

BASIC WARD INFORMATION CHECKLIST

WARD'S BASIC INFORMATION:

- Full legal name
- Address
- Phone number
- Birth certificate
- Social Security card

WARD'S MEDICAL INFORMATION:

- Medical coverage
- Physician diagnoses
- Allergies to medications
- Advance directives or known wishes regarding medical and end of life care
- Funeral plans and burial accounts
- Assessments regarding the ward's past and present medical, psychological, or social functioning
- Medication information, including:
 - All over-the-counter and prescription medications
 - Dosage
 - Reason why it's being taken
 - Name of prescribing doctor

CONTACT INFORMATION FOR THE PERSON RESPONSIBLE FOR OVERSEEING OR DISPENSING MEDICATIONS

- Contact information to immediately access any medication information 24 hours/day

A LIST OF SERVICE PROVIDERS WITH:

- Contact information for each
- Description of services provided by each
- Progress and status reports

- ANY AND ALL LEGAL DOCUMENTS INVOLVING THE WARD, INCLUDING THE GUARDIANSHIP ORDER AND LETTERS, AND COPIES OF THE REPORTS SENT TO THE COURT**

- A LIST OF KEY CONTACTS**

- NOTES THAT DETAIL CONTACTS MADE AND WORK DONE WITH OR FOR THE WARD, INCLUDING CONTACTS WITH SERVICE PROVIDERS, FAMILY, ETC**

- THE GUARDIANSHIP PLAN AND/OR PRIMARY SERVICE PROVIDER PLAN**

- REHABILITATION PLAN OR PERSONAL GOALS**

- THE WARD'S KNOWN VALUES, LIFESTYLE PREFERENCES, RELIGIOUS AND OTHER CULTURAL TRADITIONS, AS WELL AS A SOCIAL HISTORY**

- A PHOTOGRAPH OF THE WARD**



**GUARDIANSHIP
TRAINING**

A FINANCIAL FILE THAT INCLUDES:

- AN INVENTORY OF ALL THE WARD'S ASSETS AND PERSONAL PROPERTY THAT INCLUDES:**
 - Account numbers and institutional contact information
 - Balances that are checked and regularly updated
 - Appraisals of large-value assets
 - Locations of property kept outside of the home
 - Listing of all debts

- DESCRIPTION OF SHARED ASSETS, AND WHO IS MANAGING THE ASSET**

- DESCRIPTIONS OF TRUSTS AND ANNUITIES OR INVESTMENT FUNDS, INCLUDING COPIES OF ANNUAL REPORTS AND CONTACT INFORMATION FOR THE MANAGERS**

- BANK STATEMENTS, INVOICES, RECEIPTS, PURPOSES FOR PURCHASES**

- A BUDGET FOR THE NEXT 12 MONTHS AND INTO THE FUTURE**

- THE WARD'S FINANCIAL GOALS**

- BENEFITS RECEIVED INCLUDING APPROVAL DECLARATIONS AND COMMUNICATIONS WITH THE PROVIDERS**

- INSURANCE POLICIES**

- TAX RETURNS**

