

Virginia Guardian Report Worksheet

In Virginia, a guardian of an incapacitated adult must submit reports to reflect the well-being, care, and services for the adult. Initial guardian reports are required within the first six months after *qualification* and the reporting period covers the initial four months of guardianship. After the initial guardian report, annual reports are required from the date of the last reporting period. Initial and annual guardian reports must be sent to the local department of social services where the incapacitated adult resides. Once reviewed, the local department send the report to the circuit court where the guardian was appointed to be placed in the case file.

This tool is intended to help guardians *estimate* when their initial and annual reports are due. Always check with the local department of social services where the incapacitated person resides for the most accurate due dates.

Initial Report

Step #1 – Enter the date you qualified with the clerk of circuit court in the box below. This will be considered your **(a)** date for Step #3.

Date Qualified by Clerk:	
--------------------------	--

Step #2 – The initial report covers the first four months of guardianship. Using the date **(a)** above, calculate 4 months from that date. This is considered your **(b)** date for Step #3.

Step #3 – Enter date **(a)** and date **(b)** in the spaces below. Your initial report as guardian will cover the period between these dates. You will reflect these dates on page 1 of the report.

Your initial report will cover the period of:

--

(a)

TO

--

(b)

Step #4 – Initial reports are due within 6 months after the date you qualified with the clerk of circuit court. Using date **(a)** from Step #1, calculate 6 months from that date. This is considered your **(c)** date and your due date. Enter it below.

Your initial report is due no later than:

(c)

Annual Report

Step #5 – Once the initial report is submitted, you will submit a report on an annual basis. Using date **(b)** from Step #2 above, calculate 12 months from that date. This will be considered your **(d)** date.

Step #6 – Enter date **(b)** and date **(d)** in the spaces below. Your first annual report will cover the period between these dates. You will reflect these dates on page 1 of the report.

Your annual report will cover the period of:

(b)

TO

(d)

Step #7 – Annual reports are due within 4 months from the end of the annual reporting period. Using date **(d)** from Step #5, calculate 4 months from this date. This is considered your **(e)** date and is your annual report due date. Enter it below.

Your annual report is due no later than:

(e)

The dates created in Step #6 and Step #7 may be used each year after the first annual report is submitted.

As a reminder, this worksheet was created to provide estimated dates for guardian reporting. Please follow any date provided by the local department of social services.

Reports must be submitted timely. Guardians may face consequences for failing to submit a report timely.