

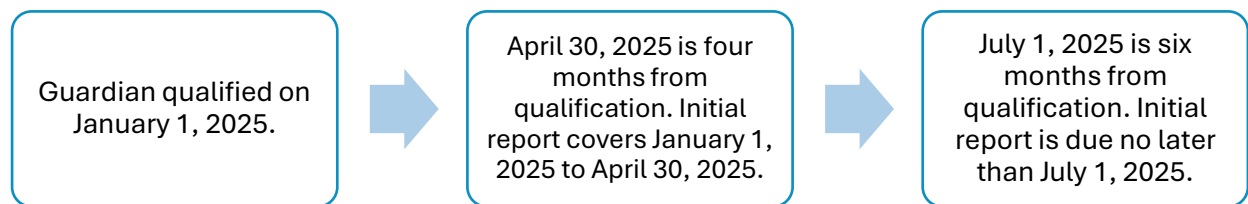
Virginia Guardian Training: Report Worksheet

In Virginia, a guardian of an incapacitated adult must submit reports to reflect the well-being, care, and services that the adult is receiving. 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 will send the report to the circuit court where the guardian was appointed to be placed in the case file.

Below is an example of the reporting timelines for initial and annual reports. Pages 2 and 3 provide instructions on how to calculate the dates for reporting. This worksheet is designed to help guardians estimate when their initial and annual reports are due. However, guardians should always confirm deadlines with [the local department of social services](#) to ensure timely and accurate reporting.

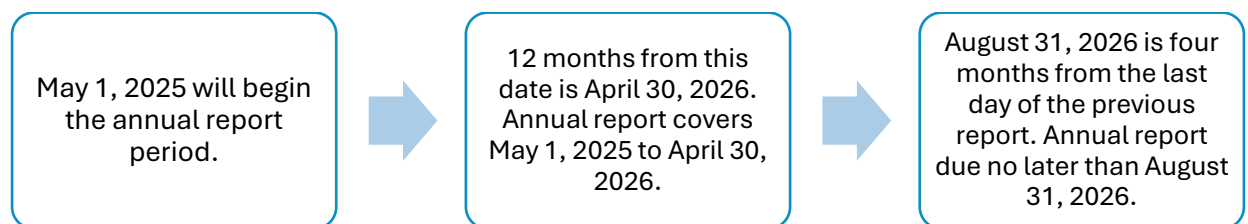
The initial report covers the first four months of the guardianship and is due within 6 months after qualification.

Initial report timeline example:



The annual report covers a 12-month period from the end of the initial reporting period and is due within four months from the last day of the previous report.

Annual report timeline example:



The timelines above for initial and annual reporting should be used as examples only.

Initial Report

Step #1 – Enter the date on the Certificate of qualification, or the date you qualified with the clerk of circuit court, in the box below. This is considered your **(a)** date and will be used again in Steps #2 and #3. This date may be different than the date on the Order of Appointment, or court order, if you did not complete the qualification process on the same day.

(a)

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.

(b)

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:

TO

(a)

(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, calculate 12 months from that date. This will be considered your **(d)** date.

(d)

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.

This worksheet is intended to help establish estimated reporting dates for guardians. Please adhere to any deadlines provided by the local department of social services, as failure to submit reports on time may result in consequences for the guardian.