

Checklist for Newly Appointed Guardians in Virginia

During the first 6 months, a guardian should...

Understand Decision Making Authority ☐



- Review the Order of Appointment in detail.
- Establish ongoing communication plan with other decision makers, such as conservator, if applicable.

Communicate with Service Providers ☐



- Notify service providers, physicians, and pharmacies of guardianship.
- Submit copies of court documents to providers if necessary.

Update Contacts ☐



- Determine where mail should be sent and update address as necessary.
- Change the address and phone number on file with service and medical providers.

Begin Care Planning ☐



- Learn about the incapacitated person's values, lifestyle, religious or cultural beliefs, wishes and goals.
- Determine and act on immediate needs of the person (i.e. medical care, housing)

Submit Initial Report of Incapacitated Person ☐



- Initial report covers the first four months of guardianship after qualification.
- Initial and annual reports are submitted to the local department of social services where the incapacitated person resides.

Complete Virginia Guardian Training ☐



- Training must be completed within 120 after qualification.
- Keep a copy of the certificate of completion for your records.