COURT OF COMMON PLEAS
_____ COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

REPORT OF GUARDIAN OF THE PERSON

Estate of: _____, an Incapacitated Person
Name of Incapacitated Person

Case File No: _____

DATE COURT APPOINTED YOU AS GUARDIAN: _____

PART I. INTRODUCTION

1. Name(s) of Guardian(s):
2. Is this a limited Guardianship? ☐ Yes ☐ No
3. Report Period

☐ This is the **Report** for the period from _____ to _____ (the **"Report Period"**); or

☐ This is the **Final Report** for the period from _____ to _____ (the **"Report Period"**) and is filed for the following reason:

☐ The death of the Incapacitated Person.
Date of Death: _____
Name of Executor/Administrator: _____

☐ The Guardian was discharged by a court order dated: _____

☐ Order for Adjudication of Capacity dated: _____

☐ Limited Duration Order Expired, dated: _____

☐ Transfer of Guardianship to: _____
Date of court order approving transfer: _____

IF THIS IS A FINAL REPORT, ONLY COMPLETE PARTS I AND V.

PART II. PERSONAL INFORMATION ABOUT THE INCAPACITATED PERSON

1. Incapacitated Person's date of birth: _____/_____/_____

2. Incapacitated Person's Current Residence:

   _____
   _____
   _____

3. Nature of Residence of the Incapacitated Person (Select One)

   ☐ Incapacitated Person's home (☐ with part-time home health care aide *or* ☐ 24/7 assistance)

   ☐ Your home

   ☐ Relative's home
   Relative's Name: _____ Relationship: _____

   ☐ Domiciliary Care
   Facility Name: _____
   Is this a Memory Support Facility? ☐ Yes ☐ No

   ☐ Personal Care Boarding Home
   Facility Name: _____
   Is this a Memory Support Facility? ☐ Yes ☐ No

   ☐ Group Home
   Facility Name: _____
   Is this a Memory Support Facility? ☐ Yes ☐ No

   ☐ Assisted Living Facility
   Facility Name: _____
   Is this a Memory Support Facility? ☐ Yes ☐ No

   ☐ Nursing Home Facility
   Facility Name: _____
   Is this a Memory Support Facility? ☐ Yes ☐ No

   ☐ Other: _____

4. The Incapacitated Person has been in the residence noted in question 3 since: _____

5. Has the Incapacitated Person moved during the **Report Period?**

☐ Yes

☐ No

If **yes**, date of move: _____

If **yes**, please provide:

Reason for move: _____

Previous residence/address: _____

PART III. MEDICAL INFORMATION

1. List the medical professionals who have seen the Incapacitated Person during the **Report Period**:

	Name
Medical Doctor	
Dentist	
Eye Doctor	
Ear Doctor	
Psychologist or Psychiatrist	
Physical Therapist	
Occupational Therapist	
Social Worker	
Geriatric Caseworker	
Other	

2. The major medical or psychiatric problems of the Incapacitated Person are as follows:

_____

_____

_____

3. Describe any social, medical, psychological and support services the Incapacitated Person is receiving:

_____

_____

_____

4. Has the Incapacitated Person been hospitalized during the **Report Period**?

   ☐ Yes

   ☐ No

   If **yes**, date(s) of hospitalization: _____

5. Has the Incapacitated Person received a mental health assessment during the **Report Period**?

   ☐ Yes

   ☐ No

   If **yes**, date(s) of evaluation: _____

PART IV. GUARDIAN'S OPINION

1. Should the guardianship be:

   ☐ Continued

   ☐ Continued with modifications

   ☐ Discharged

2. Provide the reasons for your opinion. List specific recommended modifications.

   _____

   _____

3. Have you filed a petition for modification or termination?

   ☐ Yes

   ☐ No

PART V. INFORMATION ABOUT THE GUARDIAN

1. On average, how often did you visit the Incapacitated Person during the **Report Period**?

   ☐ I live with the Incapacitated Person

   ☐ None

   ☐ Quarterly

   ☐ Monthly

   ☐ Weekly

   ☐ Daily

2. What is the average length of a visit?

☐ Less than 15 minutes

☐ Between 15 minutes and 1 hour

☐ Between 1 and 2 hours

☐ More than 2 hours

☐ Not applicable

3. Have you maintained a log of your activities as guardian?

☐ Yes - Attach a copy

☐ No

4. During this **Report Period**, did any guardian participate in guardianship training?

☐ Yes

☐ No

If **yes**, provide the following information:

Guardian Name	Dates of Training		Provider	Training Description
	Starting	Ending		

5. During this **Report Period**, was any guardian charged with or convicted of a crime?

☐ Yes - Please describe ☐ No

Guardian Name *Description*

_____ _____

_____ _____

6. During this **Report Period**, was a Protection from Abuse Order or Protection from Sexual Violence or Intimidation Order entered against any guardian?

☐ Yes - Please describe ☐ No

Guardian Name *Description*

_____ _____

_____ _____

7. Is there any reason any guardian cannot continue to serve as guardian?

☐ Yes - Please describe ☐ No

Guardian Name *Description*

_____ _____

_____ _____

8. Did the Guardian receive compensation during the **Report Period**?

☐ Yes - Complete the table below ☐ No

Amount	Guardian Name	Is Amount Based on Hourly, Monthly or Annual Fee?	If Hourly, # of Hours

9. Was the compensation approved by the court?

☐ Yes - Date of Court Order: _____

☐ No - Explain why court approval was not obtained:

_____

_____

_____

I verify that the foregoing information is correct to the best of my knowledge, information and belief; and that this verification is subject to the penalties of 18 Pa.C.S. §4904 relative to unsworn falsification to authorities.

I further acknowledge the Notice of Filing must be served within 10 days of the filing of this report pursuant to Pa.R.O.C.P. 14.8(b). Service shall be in accordance with Pa.R.O.C.P. 4.3.

Date

Signature of Guardian of the Person

Name of Guardian of the Person (type or print)

Address

City, State, Zip

Home Phone Number

Office Phone Number

Cell Phone Number

Email

Date

Signature of Co-Guardian of the Person (if applicable)

Name of Co-Guardian of the Person (type or print)

Address

City, State, Zip

Home Phone Number

Office Phone Number

Cell Phone Number

Email