



# KANSAS GUARDIANSHIP PROGRAM

## GUARDIAN OR CONSERVATOR TRAINING CHECKLIST

This checklist is used with the KGP Volunteer Training Handbook (Note Section Number References)

### CONFIDENTIALITY

I will hold in the strictest confidence all personal and business information I receive or have access to regarding the person under guardianship or conservatorship. Such information will be provided only to those directly connected with the person, and then only on a need to know basis in the furtherance of the wishes and/or in best interest of the person. I will discuss these matters only with people directly involved or those consulted for their professional knowledge and expertise.

### **KGP PROCEDURES AND PAPERWORK [I & II]**

- Agency and program information
- KGP Conflict of Interest Guideline
- KGP Contract  Stipend/No Stipend
  - No fee for services
  - IRS views stipend as income
- KGP Guardian and Conservator Monthly Reports
  - Electronic filing available
- KGP monitoring, training, support and assistance

### **ADVOCACY [IV]**

- Involve person in decision making as appropriate
- KGP Philosophy  Balancing risk versus benefit

### **COURT • LEGAL ISSUES [III & V]**

- Terminology
- Duties and responsibilities
- Limitations
  - Decisions requiring court approval
  - Admission to a "treatment facility"
- Statutory Liability Protection

#### **Accountability to the Court**

- Required Basic Instructions and Affidavit
- Conservator Inventory and Valuation
  - Annual guardian report
  - Annual conservator accounting
- Notify court of any conflict of interest
- Court oversight and review

### **INCOME, BENEFITS, FINANCIAL INFORMATION [III & VI & X]**

- SSA Representative Payee, benefits and redeterminations
- Other (VA, Railroad Retirement, Pension, Employment)
- Banking  Establishing Accounts
  - Reconciling check register with bank statement
  - Automatic bill payment
  - Improper use of funds
    - No co-mingling of funds
    - No checks written to self
    - Paper trail for all transactions

### **Department for Children and Family Services (DCF)**

- Adult Protective Services

Investigate abuse, neglect, or exploitation

### **Department for Aging and Disability Services (KDADS)**

- KanCare (HCBS Waiver(s) Home and Community Based Services)

### **Kansas Department for Health and Environment**

- KanCare Clearinghouse - Medicaid eligibility
- Resource limits and redetermination

### **PAYMENT FOR SUPPORTS AND SERVICES [VII & VIII]**

- Payment for medical care - Medicare, KanCare- Medicaid and other insurance
- HCBS Waivers (Home and Community Based Waivers)

### **MONITORING CARE, SUPPORTS AND SERVICES [IX]**

- Monitoring life issues
  - Visiting the person
- Rights Issues
- Providing or not providing consents
- Health care and medical decisions
- Participation in care plan meetings

### **ABUSE, NEGLECT, EXPLOITATION (ANE) [XII]**

- Monitoring for and reporting signs of ANE
- Guardian or conservator is mandatory reporter
- Guardian or conservator as possible perpetrator
- Penalties for ANE

### **FUNERAL AND BURIAL ARRANGEMENTS [XIII]**

- Statutory authority - guardian to make arrangements
- Guardian authority and limitations regarding cremation, organ donation and autopsy
- Court approval for conservator to pay final bills and close estate after death of the person

Volunteer Name \_\_\_\_\_

Volunteer Signature \_\_\_\_\_

KGP Signature \_\_\_\_\_ Date \_\_\_\_\_ Rev 4.2018