Revised 4/17/2024.

OFFER AR FORM

 DO NOT ADD TO CASE

Proceed with application or renewal. ONLY GUARDIAN CAN GIVE INFORMATION.

DO NOT ADD TO CASE

POA or Client can make changes and conduct signatures.

OFFER AR FORM

DO NOT ADD TO CASE

Proceed with application or renewal – ONLY GUARDIAN CAN GIVE INFORMATION - ADD TO CASE

Any Healthcare

FoodShare Only

Financial or Durable. **We may proceed.**

**YES**

**NO**

Does the order have language to manage public assistance?

Person Only

Healthcare, Medical:

POA

REP or Client can make changes and conduct signatures.

If all is correct: we may proceed

Only Client can make changes and conduct signatures.

If Incorrect: offer to send new REP form

Check REP document is completed, including proper signatures and make sure case matches REP document

Proceed with application or renewal – ONLY GUARDIAN CAN GIVE INFORMATION AND ADD TO CASE

Review order for authority and expiration date

-Estate

or

-Person and Estate

Review entire document: you are looking for verbiage stating what the Guardian or POA.

*If Conservator follow same rules as Guardian*

Hint: Scan Document and look at Headings

LEGAL

Guardian

REP

Confirm person calling is with ROI, asking for address. Once confirmed; we may give general information about case (i.e., status of case) but we can not give details about case (i.e., SSN, amount in account, etc.)

**START HERE**

 **If it’s not the client, what do I do?**

ROI

**Confirm REP by looking for document in ECF: It will be scanned as REP or LEGAL or ROI:**

**Best Practice: In Case Notes enter scan date and type of document and where you found it:**

**Example: (ECF LEGAL 01/01/2000)**