

**INVESTIGATIVE REPORT
FOR
POTENTIAL CHAPTER 54 AND CHAPTER 55 CASES**

Investigator:
Case Manager:
Dates of Contact:

Phone Extension:
Phone Extension:
Date of Report:

IDENTIFYING INFORMATION

Name: DOB:
Home Address:
Home Phone Number:
Current Placement:
Marital Status: Social Security #
Source(s) of Income:
Amount of Income:
Liquid Assets:
Property:
Medical Assistance No.:
Other Insurance Carrier:

RELATIVES:

NAME	ADDRESS/PHONE	RELATIONSHIP

SECTION I

1. Primary Disability: (Check One)

☐ Developmental Disability
☐ Degenerative Brain Disorder

☐ Serious and Persistent Mental Illness
☐ Other Like Incapacities
Specify:
2. Approximate Date of Onset:
3. Previous commitments or court findings of incompetence:

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4. Previous related hospitalizations:
5. Treating Physicians, Psychiatrists or Psychologists:
6. Diagnosis:
7. Current Caretaker(s):
8. Agencies who are providing or who have provided services to subject. Include type of services:

SECTION II

SUBJECT'S CHARACTERISTICS:

	<u>YES</u>	<u>NO</u>	<u>COMMENTS</u>
Inability to care for the home			
Poor personal hygiene			
Nutritional Concerns			
Delusional			
Hallucinations			
Paranoid			
Confusion			
Disoriented			
Substance Abuse			
Poor Money Management			
Argumentative			
Oppositional			
Criminal History			
Cooperative			
Pleasant			
Aggressive			
Non-Verbal			
Incontinent			
Ambulation Problems			

SECTION III

RECOMMENDED COURT ACTION (CHECK All that Apply)

<input type="checkbox"/>	Temporary Guardian	<input type="checkbox"/>	Person
<input type="checkbox"/>	Permanent Guardian	<input type="checkbox"/>	Estate
<input type="checkbox"/>	Successor Guardian	<input type="checkbox"/>	Protective Services
<input type="checkbox"/>	Current Guardian (Name & Address)	<input type="checkbox"/>	Protective Placement

Petitioner: Boyd Schwartz

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SECTION IV

1. Abuse/Neglect Victim:
2. Explain circumstances of case and identify any alleged perpetrator:
3. Is subject able to travel to doctor's office?
4. Would subject travel to doctor's office voluntarily?
5. Is a court order necessary to get the subject to doctor's office?
6. Is a court order necessary to get the subject to court hearing?
7. Proposed Guardian:
8. Proposed Standby Guardian:
9. Durable Power of Attorney for Finances: None
Power of Attorney for Health Care: None

COMMENTS: