Can ONLY SIGN. Client has to give information. Nothing can be shared for HC - OFFER AR FORM

DO NOT ADD TO CASE

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

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

Any Healthcare

FoodShare Only

POA or Client can make changes and conduct signatures.

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

**YES**

**NO**

Does the order have language to manage public assistance?

Person Only

Can SIGN if activated. Pend for signature and request verification – OFFER AR FORM

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)**