

633.669 Reporting requirements — assistance by clerk.

1. A guardian appointed by the court under [this chapter](#) shall file with the court the following verified reports which shall not be waived by the court:

a. The reports must be based on the needs of the protected person and take into account the best interest of the protected person as well as the protected person's preference, values, and prior directions to the extent known to, or reasonably ascertainable by, the guardian.

b. An initial care plan filed within sixty days of appointment. The information in the initial care plan shall include but not be limited to the following information:

(1) The current residence of the protected person and the guardian's plan for the protected person's living arrangements.

(2) The guardian's plan for payment of the protected person's living expenses and other expenses.

(3) If applicable, the protected person's health status and health care needs, and the guardian's plan for meeting the protected person's needs for medical, dental, and other health care needs.

(4) Whether the protected person has a living will or health care power of attorney.

(5) If applicable, the guardian's plan for other professional services needed by the protected person.

(6) If applicable, the guardian's plan for meeting the educational, training, and vocational needs of the protected person.

(7) If applicable, the guardian's plan for facilitating the participation of the protected person in social activities.

(8) The guardian's plan for facilitating contacts between the protected person and the protected person's family members and other persons significant in the life of the protected person.

(9) The guardian's plan for contact with, and activities on behalf of, the protected person.

(10) The powers that the guardian requests to carry out the initial care plan.

c. An annual report, filed within sixty days of the close of the reporting period, unless the court otherwise orders on good cause shown. The information in the annual report shall include but not be limited to the following information:

(1) The current living arrangements of the protected person.

(2) The sources of payment for the protected person's living expenses and other expenses.

(3) A description, if applicable, of the following:

(a) The protected person's physical and mental health status and the health services including medical, dental, and other professional services provided to the protected person.

(b) The protected person's employment status and the educational, training, and vocational services provided to the protected person.

(c) The guardian's facilitation of the participation of the protected person in social activities.

(d) The contact of the protected person with family members and other persons significant in the life of the protected person.

(e) The nature and extent of the guardian's visits with, and activities on behalf of, the protected person.

(4) The guardian's changes to the care plan for the protected person for the next annual reporting period.

(5) The powers that the guardian requests to carry out the care plan for the protected person for the next annual reporting period.

(6) The guardian's recommendation as to the need for continuation of the guardianship.

(7) The ability of the guardian to continue as guardian.

(8) The need of the guardian for assistance in providing or arranging for the provision of the care and protection of the protected person.

d. A final report within thirty days of the termination of the guardianship under [section 633.675](#) unless that time is extended by the court.

2. The court shall develop a simplified uniform reporting form for use in filing the required reports.

3. The clerk of the court shall notify the guardian in writing of the reporting requirements and shall provide information and assistance to the guardian in filing the reports.

4. Reports of guardians shall be reviewed and approved by a district court judge or referee.

5. If the court finds that there are reasonable grounds to believe that the guardian has committed the offense of older individual assault under [section 708.2D](#), theft against an older individual under [section 714.2A](#), consumer fraud against an older individual under [section 714.16A](#), elder abuse under [section 726.24](#), financial exploitation of an older individual under [section 726.25](#), or dependent adult abuse under [section 726.26](#), the court shall refer the matter to the appropriate county attorney for consideration of the initiation of criminal charges.

[C66, 71, 73, 75, 77, 79, 81, §633.669]

[84 Acts, ch 1299, §17](#); [85 Acts, ch 29, §9](#); [2007 Acts, ch 134, §16, 28](#); [2016 Acts, ch 1108, §72](#); [2019 Acts, ch 57, §35, 43, 44](#); [2024 Acts, ch 1009, §30, 31](#)

Referred to in [§633.635](#)