

633.669 Reporting requirements — assistance by clerk.

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

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

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

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

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

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

b. 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 medical, dental, and other professional services provided to the protected person.

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

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

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

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

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

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

c. 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.

[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](#)

2019 amendment takes effect January 1, 2020, and applies to guardianships and guardianship proceedings for adults and conservatorships and conservatorship proceedings for adults and minors established or pending before, on, or after that date; 2019 Acts, ch 57, §43, 44

For all adult guardianship cases in which the guardianship was established and the guardian was appointed prior to January 1, 2020, the initial care plan required by subsection 1, paragraph "a", shall be filed with the previously scheduled annual report; the annual report must comply with the requirements set forth in section 633.669, subsection 1, paragraph "a"; guardians appointed prior to January 1, 2020, have continuing authority to perform acts concerning the protected person that were authorized prior to January 1, 2020, through the date of the guardian's previously scheduled annual report; 2020 Acts, ch 1047, §1 - 3