PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

GUARDIANSHIP OF: _____

Case No. _____

COURT INVESTIGATOR'S REPORT ON PROPOSED GUARDIANSHIP
[R.C. 2111.041]

GENERAL INFORMATION
[To be compiled by Probate Court Investigator]

Individual's age _____ Relationship to applicant _____

Individual's residence _____

Grounds for application R.C. 2111.01 D :

The individual is alleged to be:

- ☐ mentally impaired as a result of mental illness or disability.
- ☐ mentally impaired as a result of a physical illness or disability.
- ☐ mentally impaired as a result of intellectual disability.
- ☐ mentally impaired as a result of chronic substance abuse.
- ☐ any person confined to a correctional institution within this state.

so that

- ☐ the individual is incapable of taking proper care of the individual's self.
- ☐ the individual is incapable of taking proper care of the individual's property.
- ☐ the individual fails to provide for the individual's family or other individual for whom the person is charged by law to provide.

Documentation submitted and date of evaluation _____

Referral Source: _____

INVESTIGATOR'S REPORT

I. Service of Notice

☐ Made at Individual's home

☐ Made in Hospital, Nursing Facility, or Community-Based Care Facility:

Name of Facility _____

Address of Facility _____

Administrator or representative served _____

☐ Other _____

Date of Service of Notice: _____

Others present during the contact if yes, list name and relationship) _____

_____

A. Individual's understanding of the concept of guardianship:

☐ Good ☐ Fair ☐ Poor ☐ Unable to determine. Explain:

_____

_____

B. Individual's attitude to the concept of guardianship:

☐ Consenting ☐ Opposed ☐ Unable to Determine. Explain:

_____

_____

C. Specific requests of the individual concerning enumerated rights: _____

_____

II. Mental and Physical Conditions of Individual

A. Individual's reported mental and physical diagnosis: _____

_____

Individual's reported medications: _____

Reported by whom: _____

B. Mental Status Observations: During interview were impairments noted in theIndividual's:

	Yes	No	Unable to Determine
1. Orientation Person, Place and Time)	☐	☐	☐
2. Speech	☐	☐	☐
3. Thought Process	☐	☐	☐
4. Affect	☐	☐	☐
5. Memory	☐	☐	☐
6. Concentration Comprehension	☐	☐	☐
7. Judgment	☐	☐	☐

Explain further
if necessary: _____

_____

C. Describe the Physical Condition of Individual

1. Isolation _____
2. Eating Habits _____
3. Significant Weight Loss or Gain _____
4. Sleep Habits _____
5. Motor Behavior _____

Explain further if necessary: _____

_____

D. Describe the Environmental or Living Condition of the Individual:

1. Housing Sanitation _____
2. Risk of Accidents _____

3. Physical Barriers _____

4. Resource Availability _____

Explain further if necessary: _____

III. Functional Capacities

Activities and Instrumental Activities of Daily Living

	Capable	Incapable	Unable to Determine
1. Eating	☐	☐	☐
2. Dressing	☐	☐	☐
3. Transfer from bed	☐	☐	☐
4. Toileting	☐	☐	☐
5. Bathing	☐	☐	☐
6. Handling personal finances	☐	☐	☐
7. Shopping	☐	☐	☐
8. Driving	☐	☐	☐
9. Meal preparation	☐	☐	☐
10. Doing housework	☐	☐	☐
11. Using telephone	☐	☐	☐
12. Taking medications	☐	☐	☐

Explain further if necessary:

IV. Additional Items Affecting Guardianship Plan Development

A. Are there any indications or allegations of substance abuse by the individual or significant others that could impact the guardianship issue? ☐ Yes ☐ No Explain and recommend actions needed:

B. Are there any special characteristics of the individual including aggressive, violent, or sexual behaviors, or other vulnerabilities that pose a risk to self or others, which should be considered as guardianship decisions on living arrangements and supervision are made? ☐ Yes ☐ No Explain the characteristics and make recommendations:

C. Are there any allegations or indications of abuse, neglect, or exploitation of the individual? ☐ Yes ☐ No Explain and recommend needed actions:

D. Is there a need for additional medical, psychiatric or psychological testing? ☐ Yes ☐ No if yes, give specific recommendations:

E. Are there inconsistencies between the Expert Evaluation and the Court Investigator's findings that need further review by the Court? ☐ Yes ☐ No If yes, identify the inconsistencies and make a recommendation(s to the Court:

F. Are there unresolved issues/conflicts/differences among the parties? ☐ Yes ☐ No
If yes, would mediation be of assistance? ☐ Yes ☐ No Explain:

G. Is there a power of attorney for financial affairs? ☐ Yes ☐ No ☐ Unknown
If yes, where is it located?

Who is the attorney in fact?

H. Is there a last will and testament? ☐ Yes ☐ No ☐ Unknown
If yes, where is it located?

I. Is there a durable power of attorney for health care/living will? ☐ Yes ☐ No
Unknown If yes, where is it located?

Give name and address of attorney-in-fact:

J. Is there an advance directive for mental health care? ☐ Yes ☐ No ☐ Unknown If yes, where is it located?

Give name and address of attorney-in-fact:

K. Is the individual a veteran? ☐ Yes ☐ No

V. RECOMMENDATIONS: Given the above information and Expert Evaluation s :

A. IS A GUARDIANSHIP NECESSARY?

☐ Yes
- ☐ Person Only
- ☐ Estate Only
- ☐ Person and Estate
- ☐ Limited List Duties

☐ No Explain and recommend a less restrictive alternative:

Are any of the mental, physical, or environmental conditions reversible? ☐ Yes ☐ No ☐ Unknown

If yes, explain and recommend a date for the Court to review the guardianship:

_____

B. NECESSITY FOR THE APPOINTMENT OF:

☐ Attorney ☐ Independent Expert Evaluator

Are there special urgency needs? Explain:

_____
_____
_____
_____

Remarks:

_____
_____
_____
_____
_____
_____
_____
_____
_____

I certify that I have served notice to the alleged incompetent as required by statute and I have communicated to the individual in a language and method best understandable by the individual the individual's right to be present at the hearing, the right to contest any application for the appointment of a guardian for his or her person, estate, or both, and the right to be represented by counsel.

_____ _____
Date Investigator