

Marion County Probate Department
Instructions for Court Visitor Report Templates

Marion County includes three templates for visitor's reports: one template for the temporary guardianship, one for minor guardianships and one for a adult guardianships.

The instructions on the forms are in italics. After following the instructions on the form, delete the italics and any options not selected or other extraneous text.

To check a box, right click on the box you wish to check, select "properties," and change the "default value" to "checked." Make sure a box is checked for every question.

The large boxes after questions are for comments or to include narrative information the question requests. They have no limits for the length of text they can include, so give complete answers.

Some of the questions have "Unk" as a possible response. This is short for "unknown." Use this answer when the Respondent is unable to respond or responds inconsistently. Also use this response for questions the Visitor is unable to answer. For example, the Visitor may not be able to determine whether the Respondent is able to attend a hearing (Question 1(g) of the regular guardianship template).

Some of the questions have "N/A" as a possible response. That means that the question is not applicable to the situation. For example, Question 1(e) of the regular guardianship template begins with, "If the Respondent does not plan to retain counsel" If the Respondent *does* plan to retain counsel, N/A is the appropriate response.

Another example of when N/A is an appropriate response is for statutory options that are not requested in the Petition. For example, the Petition may request a regular guardianship alone, or may also request a temporary guardianship or a conservatorship, both. If the Petition only requests a regular guardianship, check N/A for Questions 5(c), 5(d), 5(e), 5(f), and 5(g). If the Petition requests a regular guardianship and either a conservatorship or a temporary guardianship, check N/A as appropriate. Likewise, in a temporary guardianship proceeding, if a temporary conservatorship is not requested, check N/A for Questions 3(e), 3(f), and 3(g).

Please note that the position of the "Yes/No" boxes changes, depending on the question. A box that is checked in the far right position indicates that special attention may be required by the Court. For example, if Questions 1(d) or 1(e) are checked "Yes", the Court may need to appoint an attorney for the Respondent.