

9525.3065 MONITORING AND EVALUATION.

Subpart 1. **Annual review.** Under Minnesota Statutes, section 252A.16, the county staff acting as public guardian shall conduct an annual review of the status of each ward. The county staff acting as public guardian shall submit to the department by the annual birthday of each ward, a copy of the annual review for each ward receiving public guardianship services during the past calendar year. The annual review must be in writing in the form determined by the local agency and must minimally include a description of the ward's:

- A. physical adjustment and progress;
- B. mental adjustment and progress;
- C. social adjustment and progress; and
- D. legal status based on items A to C.

The annual review required under parts 9525.0004 to 9525.0036 may be used to fulfill the annual review requirement of this subpart only when that review contains all of the criteria required under items A to D. The county staff acting as public guardian must review and sign all annual reviews.

If the county staff acting as public guardian determines that the ward is no longer in need of guardianship or is capable of functioning under a less restrictive conservatorship, the local agency shall petition the court for a termination or modification of public guardianship as specified in part 9525.3085.

Subp. 2. **Quarterly review of records.** Under Minnesota Statutes, section 252A.21, subdivision 2, the county staff acting as public guardian shall review the records from the day, residential, and any support services on a quarterly basis. The quarterly review of records must be in writing in the form determined by the local agency. The quarterly review must contain any data about the use of aversive and deprivation procedures under part 9525.3045 and psychotropic medications under part 9525.3050. In conducting the quarterly review, the county staff acting as public guardian shall indicate in writing whether:

- A. the ward is satisfied with the services;
- B. the services are in the best interest of the ward;
- C. the services are being provided according to the ward's individual service plan;
and
- D. the services continue to meet the needs of the ward in the least restrictive environment.

The local agency shall maintain a record of all quarterly reviews according to the local agency's record maintenance schedule and submit copies to the department upon request.

Subp. 3. **Additional reports.** The county staff acting as public guardian shall provide additional reports as requested by the department.

Statutory Authority: *MS s 252A.21; 256B.092*

History: *17 SR 2276; 18 SR 2244*

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