



## Appointment History

Click on Appointment History to view a grid of a ward's appointment history records

Client: TEST, JOE
Face Sheet: \$0.00
Events
<b>Appointment History</b>
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Click Insert from the Appointment History grid to insert/update the client's Appointment History

Appointment History

**Insert Administration History**

Save Save and Re-Insert

**Appointment History**

Type:

Power:

Appointment Date:

Expiration Date:

Termination Date:

Save Save and Re-Insert

The Type dropdown contains the following values:

- ✓
- Emergency
- Emergency Limited
- Full
- Limited
- Standby
- Successor
- Successor Emergency Limited
- Successor Full
- Successor Limited
- Successor Standby
- Terminated

The Power dropdown contains the following values:

- ✓
- Conservator
- Guardian
- Guardian/Conservator

Save the record to update the client's face sheet

Appointment History

### Insert Administration History

Appointment History	
Type:	Limited
Power:	Guardian
Appointment Date:	04/01/2021
Expiration Date:	
Termination Date:	

The saved record will show as view only on the Face Sheet.

Appointment Date:04/01/2021 Appointment Type:Limited Guardian

For clients with multiple types/powers, like "Full Guardian/Ltd. Conservator", enter 2 records on the Appointment History with the same Appointment Date.

## Appointment History

View

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<input type="checkbox"/>		<input type="button" value="Appointment Date"/>	Type	Power	Expiration Date	Termination Date
<input type="checkbox"/>		04/01/2021	Full	Guardian		
<input type="checkbox"/>		04/01/2021	Limited	Conservator		

This will have the following result on the Face Sheet.

Appointment Date:04/01/2021 Appointment Type:Full Guardian/Limited Conservator

## EMERGENCY APPOINTMENTS

The Appointment History module is also used to track Emergency Appointments.

In this example, the client is Full Guardian/Emergency Limited Conservator

### Appointment History

View

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<input type="checkbox"/>		<input type="button" value="Appointment Date"/>	Type	Power	Expiration Date	Termination Date
<input type="checkbox"/>		04/01/2021	Full	Guardian		
<input type="checkbox"/>		04/01/2021	Emergency Limited	Conservator		

Appointment Date:  Appointment Type:

	Appointment Type	Began	Expired
Conservator:	<input type="text" value="Emergency Limited"/>	<input type="text" value="04/01/2021"/>	<input type="text"/>
Guardian:	<input type="text" value="Full"/>	<input type="text" value="04/01/2021"/>	<input type="text"/>
Adjudication Date:	<input type="text"/>		
Court County:	<input type="text"/>	Emergency Appointment Alert Date:	<input type="text"/>

If the Emergency Appointment changes, insert a new Appointment History record to track that change. For example, the Emergency Limited Conservator become Full Conservator.

Appointment History

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<input type="checkbox"/>		Appointment Date	Type	Power	Expiration Date
<input type="checkbox"/>		05/03/2021	Full	Conservator	
<input type="checkbox"/>		04/01/2021	Emergency Limited	Conservator	
<input type="checkbox"/>		04/01/2021	Full	Guardian	

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**Appointment Information**

<b>Client</b>	<b>Financial</b>	<b>Medical Insurance</b>
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	Appointment Type	Began	Expired
Conservator:	Full	05/03/2021	
Guardian:	Full	04/01/2021	

**How to Terminate a Power**

In the above example, say the Conservator terminated/ended. Insert a new Appointment History record.

Appointment History

**Insert Administration History**

<b>Appointment History</b>	
Type:	Terminated
Power:	Conservator
Appointment Date:	05/10/2021
Expiration Date:	

Appointment History

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<input type="checkbox"/>		Appointment Date	Type	Power	Expiration Date
<input type="checkbox"/>		05/10/2021	Terminated	Conservator	
<input type="checkbox"/>		05/03/2021	Full	Conservator	
<input type="checkbox"/>		04/01/2021	Emergency Limited	Conservator	
<input type="checkbox"/>		04/01/2021	Full	Guardian	

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**Appointment Information**

<b>Client</b>	<b>Financial</b>	<b>Medical Insurance</b>	
	Appointment Type	Began	Expired
Conservator:	Terminated	05/10/2021	
Guardian:	Full	04/01/2021	