

Legal Status Addendum

Data Field	Legal Status Addendum
Organization and Program Name	Record the names of the Organization and the Program if applicable
Individual's Name	Record the first name, last name, and middle initial of the Individual being served. Order of name is at agency discretion.
Record #	Record your agency's established Record number for the Individual.
Date of Birth	Record the date of birth of the Individual. (e.g. MM/DD/YYYY)
Representative Payee	Note if Individual served has a designated Representative Payee. If so, document Representative Payee's name or name of the agency, phone number and relationship to Individual served.
Legal Guardian	Note if Individual served has a legally appointed guardian. If so, document guardian's name, phone number, and relationship to Individual served. Also, indicate if it is permanent or temporary by checking the appropriate box. If temporary, provide detail, including the expiration date.
Conservatorship	Note if Individual served has a Conservatorship. If so, document the name or name of the agency, phone number, and relationship to Individual served.
Special Needs Trust	Note if Individual served has a Special Needs Trust. If so, document the name of the Trustee, phone number, and relationship to Individual served.
Completed By-Print Name, Credentials, Signature, Date	Legibly print name, credential(s), and signature of individual completing the form. Record the date of signature.