

## 90-850.2. CONSERVATORSHIP SERVICES REFERRALS

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**A. General** This section provides information regarding referrals to conservatorship services.

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**B. Conservatorship Services** These services are provided by court order for persons who are gravely disabled (meaning a condition in which the individual is not capable of providing for his/her basic needs for food, clothing or shelter as a result of a mental disorder). The person must also be incapable, or unwilling to accept voluntary mental health treatment. In order to be eligible for conservatorship the office of Counselor In Mental Health must conduct an investigation and make a recommendation to the Superior Court regarding conservatorship of the person pursuant to Section 5350 of the W&I Code. For more information, call Public Administrator/Public Guardian at (858) 694-3500.

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**C. Referral of Conservatorship Cases to GR** Individuals in conservatorship have been found by the court system to be gravely mentally impaired and unable to provide for their own food, shelter and clothing. Most individuals qualify for SSI/SSP. If there is a delay in authorization of SSI/SSP, a Protective Social Worker (PSW) may become involved in the GR application process on behalf of the individual.

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**D. Social Worker Responsibilities** The Social Worker must take the actions in the table below for conservatorship cases.

| <b>Step</b> | <b>Action</b>   |
|-------------|---|
| 1           | Verify that the conservatee is a resident of San Diego County and has proper identification.              |
| 2           | Call the appropriate Pre-application/Intake supervisor to arrange for a screening and intake appointment. |
| 3           | Inform the supervisor of the applicant's living arrangement.  |

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Continued

### Social Worker Responsibilities (continued)

| Step | Action   |
|------|--|
| 4    | Ensure that the conservatee or applicant takes the following items to his/her application appointment: <ul style="list-style-type: none"> <li>• ID</li> <li>• Proof of residence (rent receipts, utility bills, or letters of conservatorship)</li> <li>• Verification of property (bank account statements, benefit award letters, etc.)</li> <li>• Motor vehicle registration</li> <li>• Insurance policies</li> <li>• Alien registration cards</li> <li>• Verification of unemployability (letters of conservatorship)</li> </ul> |
| 5    | Follow up all telephoned referrals with a gram or other written correspondence.  |
| 6    | Arrange to take the applicant to the appropriate FRC for the scheduled appointment, if the client is in an independent living arrangement.   |
| 7    | Notify worker of any change in case status or worker assignment.   |

### E. Supervisor Responsibilities

The table below shows the supervisor's responsibilities for conservatorship cases.

| If the ...                                       | Then the supervisor will arrange ...  |
|--|---|
| applicant/recipient is living in an institution, | a home call by a worker to complete the application process.                  |
| Social Worker cannot accompany the applicant,    | to have staff assist him/her in completing the required GR application forms. |

### F. Worker Responsibilities

The worker must take the actions in the table below for conservatorship cases.

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Continued

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**Worker  
Responsibilities**  
(continued)

| <b>Step</b> | <b>Action</b>  |
|-------------|--|
| 1           | Notify the applicant/recipient and the Social Worker via a NOA whether or not the case is granted. If the case is to be denied, the worker will contact the Social Worker first to discuss the denial. |
| 2           | Notify the Social Worker of any change in case status or worker assignment, once the case is approved.   |

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**G.  
Case Closing**

The worker must take the actions in the table below when a conservatorship case is about to close.

| <b>Step</b> | <b>Action</b>   |
|-------------|---|
| 1           | Contact the Social Worker before any conservatee's or Adult Protective Service's (APS) recipient's case is closed. He/she may assist the recipient in complying with GR regulations, or may need to be informed of new information the worker may have discovered (for example, the recipient left the county, moved without a forwarding address, etc.).                                 |
| 2           | Follow the same closing procedures as in other GR cases, in addition to notifying the Social Worker.  |
| 3           | If a case is closed because a conservatee or APS recipient has failed to provide information and the Social Worker is not notified by the worker prior to closing, the Social Worker may contact the appropriate supervisor liaison (Pre-application/ Intake supervisor). The supervisor liaison may intervene and have the case reopened as an erroneous discontinuance, if appropriate. |

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