

CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (name): <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> PROPOSED CONSERVATEE	CASE NUMBER:
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**EVERYDAY ACTIVITIES ATTACHMENT TO CONFIDENTIAL CAPACITY ASSESSMENT
AND DECLARATION—PROBATE CONSERVATORSHIP (FORM GC-335)**

This form is for optional use in a probate conservatorship proceeding, in conjunction with *Confidential Clinical Assessment and Declaration—Probate Conservatorship* (form GC-335), to indicate the ability of the person described in item 1 to perform activities of daily living and instrumental activities of daily living.

The person whose abilities are described on this form

1. a. Name:
- b. Address:
 Telephone number: _____ Email address: _____
 Date of birth: _____

The person who is completing this form

2. a. Name:
- b. Office address:
 Telephone number: _____ Email address: _____
3. a. I am a California-licensed physician psychologist nurse practitioner physician assistant
 registered nurse clinical social worker occupational therapist
 other licensed professional (*specify profession*): _____
- b. My license number is: _____

4. *Check the box or boxes that apply to you.*

- a. I am the clinician who conducted the assessment of the person named in item 1 documented on the *Confidential Clinical Assessment and Declaration—Probate Conservatorship* (form GC-335) to which this form is attached, and I completed that form. The conclusions and opinions given in this form are based on the same assessment.
- b. I work or consult with the clinician who completed the *Confidential Clinical Assessment and Declaration—Probate Conservatorship* (form GC-335) to which this form is attached, and I participated in that clinician's assessment of the person named in item 1. The conclusions and opinions in this form are based on my participation in that assessment.
- c. The conclusions and opinions given in this form are based on the application of my knowledge, experience, and training to my personal observations of the person named in item 1, as described below.

Items 5–11 describe my conclusions about the ability of the person named in item 1 to perform activities in each of the listed categories based on information gathered as described in item 4.

Activities of Daily Living (care of self and related activities)

5. **Maintain adequate hygiene** (for example, bathing, grooming, dressing, caring for teeth, going to the toilet)
 Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know
 Comments below in Attachment 5.

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Activities of Daily Living (care of self and related activities)

6. Prepare meals and eat for adequate nutrition

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 6.

7. Identify abuse or neglect and protect self from harm

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 7.

Instrumental Activities of Daily Living

8. Financial (if appropriate, note dollar limits)

a. Protect and spend small amounts of cash

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 8a.

b. Manage and use checks; pay monthly bills

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 8b.

c. Enter into a contract (including, for example, to buy, sell, or lease real property or to obtain and use a credit card)

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 8c.

9. Resist fraud or undue influence (for example, has a history of being a victim of fraud or undue influence)

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 9.

10. Medical

a. Choose and direct caregivers

Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 10a.

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10. b. Admit self to health-care facility

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 10b.

c. Manage own medication (take proper dose as scheduled; refill or renew prescriptions as needed)

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 10c.

d. Contact help if ill or in an emergency

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 10d.

11. Home and community life

a. Maintain a reasonably safe and clean home or other living environment; arrange for home maintenance or repair

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 11a.

b. Recognize and avoid common hazards (for example, a hot stove or poisons)

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 11b.

c. Access transportation (for example, drive a car or use public transportation)

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 11c.

d. Initiate and follow a schedule of daily activities

- Able; fully independent
 Able with advice and passive support
 Able only with active assistance
 Unable, even with assistance
 I don't know

Comments below in Attachment 11d.

CONFIDENTIAL

GC-335A

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12. Other information regarding my assessment of the person's ability to perform activities of daily living or instrumental activities of daily living, including any significant impairments to that ability, is given below in Attachment 12.

13. Number of pages attached: _____

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

 (TYPE OR PRINT NAME)

 _____
 (SIGNATURE OF DECLARANT)

