

**WSC ADVISORY UPDATED #2022-005**  
**TRACKING LEGAL REPRESENTATIVE INFORMATION FOR CLIENTS**  
**INFORMATIONAL**

**EFFECTIVE DATE: UPDATED FEBRUARY 23, 2022**

The Agency for Persons with Disabilities (APD) tracks client Legal Representative data through the Contacts tab in APD iConnect. Pursuant to the Developmental Disabilities iBudget Waiver Handbook, Rule 59G-13.070, F.A.C., page 2-77, Waiver Support Coordinators (WSCs) and Consumer Directed Care Plus (CDC+) Consultants are required to “maintain accurate recipient and legal representative demographics in APD iConnect. Maintain records of documentation that identifies legal representatives.” **Please review and/or update listed Contacts and upload any new or recently updated documentation identifying a legal representative for your client during the annual support planning process.**

To accurately enter Contact tab information, please use the following information:

- If an individual has a Legal Representative of any sort, please select Legal Representative as the Primary Relationship, then select one of the following types of Legal Representative, in addition to any other relationship types:
  - Guardian
  - Guardian Advocate
  - Power of Attorney or Durable Power of Attorney
  - Parent of a Minor
  - Medical Proxy
- If the individual is a minor, the Primary Relationship should still be selected as Legal Representative and then Parent may be selected from the Relationship(s) menu.
- If an adult client does not have a Legal Representative, please select the appropriate Primary Relationship that is not Legal Representative.



File																						
<b>Contact Detail</b>																						
Instructions	For ALL types of legal representative, the primary relationship must ALWAYS be Legal Representative (including the parent of a minor) so they can receive all legal notices.																					
Primary Relationship *	Legal Representative																					
Relationship(s)	<table border="1"><tr><td>Advocate</td><td>▶</td><td>Guardian</td></tr><tr><td>Attorney</td><td>▶</td><td>Sibling</td></tr><tr><td>Caregiver</td><td>▶</td><td></td></tr><tr><td>Case Manager</td><td>▶</td><td></td></tr><tr><td>CDC Representative</td><td>◀</td><td></td></tr><tr><td>Circle of Supports</td><td>◀</td><td></td></tr><tr><td>Client Advocate</td><td>◀</td><td></td></tr></table>	Advocate	▶	Guardian	Attorney	▶	Sibling	Caregiver	▶		Case Manager	▶		CDC Representative	◀		Circle of Supports	◀		Client Advocate	◀	
Advocate	▶	Guardian																				
Attorney	▶	Sibling																				
Caregiver	▶																					
Case Manager	▶																					
CDC Representative	◀																					
Circle of Supports	◀																					
Client Advocate	◀																					
Active Military Status	<input type="checkbox"/>																					
Active	<input checked="" type="checkbox"/>																					
Comments	<div style="border: 1px solid #ccc; height: 40px;"></div>																					

## UPDATE – Uploading Legal Representative Documentation

If your client has a Legal Representative of any sort, the documentation identifying the Legal Representative must be uploaded to APD iConnect on the Notes Tab.

To accurately upload this documentation, please use the following information:

Note Type: Support Plan

Note Subtype: Documentation

Description: Guardianship Documentation



File Tools

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**Notes Details**

Division *	APD ▼
Note By *	Mathews, Elizabeth ▼
Note Date *	02/07/2022
Program/Provider	▼
Note Type *	Support Plan ▼*
Note Sub-Type	Documentation ▼
Description	Guardian Documentation
Note	<p><b>B</b> <i>I</i> <u>U</u> 16px ▼ <b>A</b> ▼</p> <p>Please see the attached legal documents</p>
Status *	Complete ▼
Date Completed	02/07/2022