# Massachusetts Probate and Family Court

# Module 8: How to File and Distribute Guardian and Conservator Reports

## Welcome

Welcome to the Massachusetts Probate and Family Court's orientation program for guardians and conservators of adults.

In this training module you will learn:

* How to file guardian and conservator reports; and
* How to distribute them

## Guardian’s Care Plan Report (MPC 821)

### Who is entitled to a copy

Before you file the completed Guardian’s Care Plan Report (MPC 821), a copy of it must be sent to all persons entitled to it. The persons entitled to a copy of the report are:

* The adult.
* Any attorney who represents the adult; and
* Any conservator of the adult.

### How to send a copy

Send a copy of the report to the adult either by handing it to them or by mailing it to their current address stated on page 1 of the report.

Send a copy of the report to any attorney who represents the adult either by handing it to them, by mailing it to their primary business address, or by emailing it to their primary business email address.

Send a copy of the report to any conservator of the adult either by handing it to them or by mailing it to the address they provided to the Court.

### How to file the Report

After you have sent a copy of the Guardian’s Care Plan Report to each person entitled to it and completed the Certificate of Service, file the original report with the Court. You can file it in person, by mail, or by e-filing. There is no fee to file this report.

A list of all Divisions of the Probate and Family Court and their addresses can be found on the Probate and Family Court webpage at mass.gov. Information about how to e-file can also be found there.

## Conservator’s Inventory (MPC 854 OR MPC 854a)

### Who is entitled to a copy

Before you file the Inventory (MPC 854 or MPC 854a), a copy of it must be sent to all persons entitled to it. The persons entitled to a copy of the Inventory are:

* The adult;
* Any attorney who represents the adult; and
* Any guardian of the adult.

### How to send a copy

Send a copy of the Inventory to the adult either by handing it to them, or by mailing it to their current address.

Send a copy of the Inventory to any attorney who represents the adult either by handing it to them, by mailing it to their primary business address, or by emailing it to their primary business email address.

Send a copy of the Inventory to any guardian of the adult either by handing it to them or by mailing it to the address they provided to the Court.

### How to file the Inventory

After you have sent a copy of the Inventory to each person entitled to it, file the original Inventory with the Court. You can file it in person, by mail, or by e-filing. There is no fee to file this report.

A list of all Divisions of the Probate and Family Court and their addresses can be found on the Probate and Family Court webpage at Mass.gov. Information about how to e-file can also be found there.

## Conservator’s Account (MPC 853 OR MPC 853a)

### How to file the Account

The (MPC 853 or MPC 853a) and the proper Petition for its allowance can be filed with the Court in person or by mail. At this time, neither the Account nor the Petition for its allowance can be e-filed. There is a fee to file the Account and the Petition. More information on these filing fees can be found on the Probate and Family Court webpage at Mass.gov.

A list of all Divisions of the Probate and Family Court and their addresses can be found on the Probate and Family Court webpage at Mass.gov. Information about how to e-file can also be found there.

### How to send a copy

The Account and the Petition for its allowance are filed with the Court before you send copies to anyone. After you file the Account and the Petition for its allowance, the Court will issue a citation to you. A citation is a Court Order telling you how to serve the Petition on interested persons. You must follow the instructions on the citation.

There is an additional fee for the issuance of the citation. More information on the citation fee can be found on the Probate and Family Court webpage at Mass.gov.

### Who is entitled to a copy

A copy of the citation must be sent to all interested persons. Certain persons always are interested. They include:

1. The adult;
2. Any attorney who represents the adult;
3. The adult’s guardian, if any;
4. The adult’s spouse; and
5. The Veterans Administration or the Department of Developmental Services if they have any involvement with the adult.

Other persons may be interested if they have a property interest in the adult’s estate. The Court always may order additional service.

If the Court appoints a Guardian ad litem to represent the adult, you must also send a copy of the Account, the Petition, and the citation to the Guardian ad litem.

After you have had the Petition and the Account served as ordered in the citation, you must complete the Return of Service section on the second page. Then, return the original completed citation to the Court. You can file it in person, by mail, or by e-filing.

## Resources

Remember, there are resources available to help you in your role as guardian or conservator.   
Click on the icons to see the various resources available.

* Court: If you have questions, you may always ask the Court for direction.
* OAGCO: You may also reach out to the OAGCO, that is the Office of Adult Guardianship and Conservatorship Oversight in the Administrative Office of the Probate and Family Court.
* Email: We are here to help you. You can contact us by email at OAGCO@jud.state.ma.us
* Webpage: You can visit us on the Probate and Family Court webpage at mass.gov to learn more about the OAGCO and how it can assist you as a guardian or conservator.

*Chief Justice John D. Casey:*

*“Thank you for becoming a guardian or conservator for an adult who needs your help.”*

This module was supported, in part, by a grant (No. 90EJIG0023-01-0) from the Administration for Community Living (ACL), U.S. Department of Health and Human Services (DHHS). Grantees carrying out projects under government sponsorship are encouraged to express freely their findings and conclusions. Therefore, points of view or opinions do not necessarily represent official ACL or DHHS policy.