

**Checklists for Report on Appointments and Fees Approved**

***District and County Courts***

To enable compliance by district clerks and county clerks with the reporting requirements of Section 36.004 of the Government Code:

These requirements apply to all case types for appointments as attorney ad litem, competency evaluator, guardian, guardian ad litem, or mediator.

In order to get the clerks the information they need to prepare the report, it is recommended that:

* Each appointment be made by written order or some other process to document the appointment.
* Each approval of the payment be accomplished by a separate written order or similar process.

|  |  |  |
| --- | --- | --- |
| CHECKLIST for appointments | | |
|  | Case number and style |  |
|  | Name of person or entity appointed |  |
|  | Position to which appointed |  |
|  | Relationship to ward or deceased, if relevant | Indicate: Attorney, private professional guardian, public guardianship program or friend/family member |
|  | Date of appointment |  |

|  |  |  |
| --- | --- | --- |
| CHECKLIST for orders approving payment | | |
|  | Case Number and Style |  |
|  | Name of person or entity appointed |  |
|  | Position to which appointed |  |
|  | Relationship to ward or deceased, if relevant | Indicate: Attorney, private professional guardian, public guardianship program or friend/family member |
|  | Date of approval of fee |  |
|  | Source of fees |  |
|  | Amount of fees approved |  |
|  | If fees exceed $1,000: |  |
|  | Number of hours billed for work performed |  |
|  | Billed expenses |  |

For more information about the reporting requirements, visit <http://www.txcourts.gov/reporting-to-oca.aspx>.