

**North Carolina Department of Health and Human Services  
Division of Aging and Adult Services**

2101 Mail Service Center • Raleigh, North Carolina 27699-2101  
Tel 919 733-3818 • Fax No. 919 715-0023

Beverly Eaves Perdue, Governor  
Lanier M. Cansler, Secretary

Dennis W. Streets, Director  
919-733-3983

July 31, 2009

**DEAR HEALTH DEPARTMENT DIRECTOR  
DEAR DEPARTMENT ON AGING DIRECTOR**

**SUBJECT: Mid-Year DHHS Blanket Bond Reconciliation**

**Midyear Reconciliation**

The Adult Services Section of the Division of Aging and Adult Services (DAAS) is responsible for management of the Department of Health and Human Services (DHHS) Blanket Bond for Disinterested Public Agent Guardians. As part of this responsibility, we are preparing for the 2009 mid-year accounting with the insurance carrier. This accounting requires that accurate information be submitted to the insurance carrier regarding the names of all wards represented by public agent guardians and the amount of each ward's bond. It is important that our records be kept up-to-date to maintain valid coverage for each ward registered in the DHHS Blanket Bond system.

North Carolina General Statute 35A-1239 requires bond coverage for all disinterested public agents appointed to serve as guardians, whether they are appointed to serve as guardian of the person, estate or general guardian. You are responsible for notifying DAAS of any changes in the status of each ward throughout the year. We appreciate your taking time to review the enclosed information so that we may keep our records updated.

**Making Changes and Updates to Your List of Wards**

The attached "*Wards by Agency Report*" lists the wards for whom our records indicate you have guardianship responsibility. The report was current as of July 30, 2009, the date it was printed. We request that you closely review each entry on the report, paying particular attention to the following items:

- Wards you are no longer responsible for and whose names should be deleted from your list.
- Wards you are responsible for but whose names are not on the list.
- Wards' dates of birth.
- Date of the guardianship appointment.

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<http://www.nccarelink.gov/>

- The amount of estate and bond coverage listed for each ward.
- The name and position of the public agent guardian.

If you need to make changes and updates to your DHHS Blanket Bond list, you must submit the changes on a DHHS-7016 (rev. 1/04) form. A copy of this form is attached for your convenience. Please make additional copies if you are updating the status of more than one ward. A copy of the interactive form may also be obtained at <http://info.dhhs.state.nc.us/olm/forms/doa/DAAS-7016ia.pdf>

In addition to the wards being covered by DHHS Blanket Bond, we are also requesting you complete the DHHS-7016 for wards who are covered by a private bond. Wards who are covered by a private bond are not included in the report submitted to the insurance carrier, but accurate data is essential when responding to the legislators. It is also important that we maintain an accurate account of all active wards receiving service from public agent guardians. Please write "Private Bond" on Line 14 when completing the DHHS-7016.

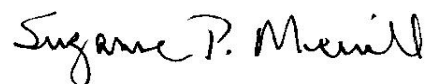
All DHHS-7016 forms containing necessary changes and updates to your list of wards should be forward by email to [michelle.wilder@dhhs.nc.gov](mailto:michelle.wilder@dhhs.nc.gov) or mailed to:

Michelle Wilder-Baker, Guardianship Program Consultant  
Division of Aging and Adult Services  
Adult Services Section  
2101 Mail Service Center  
Raleigh, NC 27699-2101

**PLEASE SUBMIT ALL CHANGES AND/OR UPDATES BY August 25, 2009.**

If you have questions or need additional information, please contact Mrs. Baker at (919) 733-3818.

Sincerely,



Suzanne P. Merrill, Chief  
Adult Services Section

SPM/mwb

AFS-8-2009

Attachments