

Incompetency & Guardianship Proceedings for Clerks

May 6-8, 2019

School of Government, Chapel Hill, NC

Monday, May 6

- 11:00am** *Check-in, Boxed Lunches Available*
- 11:15am** **Welcome and Introductions**
- 11:45am** **The Clerk's Role in Adult Guardianship Proceedings**
Meredith Smith, Associate Professor, UNC School of Government
- 1:00pm** **Screening the Case**
Meredith Smith
- 3:00pm** **Break**
- 3:15pm** **Mental Health and Substance Abuse Conditions that Impair Capacity**
Jodi Flick, Clinical Associate Professor, UNC School of Social Work
- 5:15pm** **Adjourn**

Tuesday, May 7

- 8:30am** **Recap and Discussion**
Meredith Smith
- 8:45am** **The Clerk's Authority to Order Access to Medical, Mental Health, and Substance Abuse Records**
Mark Botts, Associate Professor, UNC School of Government
- 10:00am** **The Role of the Guardian Ad Litem Attorney**
Angela Lassiter, Attorney
- 11:00am** **Break**
- 11:10am** **Presiding Over Cases with Unrepresented Litigants**
Chief District Court Judge Beth Keever, Fayetteville, retired
- 12:00pm** **Lunch (SOG Dining Hall)**
- 12:45pm** **Multidisciplinary Evaluations**
Meredith Smith
Michelle Ball, Clerk of Superior Court, Johnston County

- 1:30pm Analyzing Capacity and Appointing a Guardian**
Meredith Smith
Tonya Leggett, Clerk of Superior Court, Martin County
- 3:20pm Break**
- 3:30pm The Aging Brain: Dementia and Other Conditions that Impair Capacity in Older Adults**
Michele A. Haber, MD, MS, MPH, FACP,
Geriatrics Consulting Services, Greensboro
- 5:00pm Adjourn**

Wednesday, May 8

- 8:30am Recap and Discussion**
Meredith Smith
- 8:35am Identifying Supports and Moving from Guardianship to Limited Guardianship to Restoration**
Jonathan Martinis, Senior Director for Law & Policy, The Burton Blatt Institute at Syracuse University
Co-Project Director, National Resource Center for Supported Decision-Making
- 10:35am Accessing APS Records and the Role of DSS**
Aimee Wall, Professor, UNC School of Government
- 11:20am Break**
- 11:30am Receiving, Reviewing, and Compelling Status Reports**
Meredith Smith
Evelyn Pitchford, Guardianship Consultant, NC DHHS Division of Aging and Adult Services
- 12:15pm Lunch (SOG Dining Hall)**
- 1:00pm What a Guardian Can and Can't Do: Consent to Treatment**
Mark Botts
- 1:30pm The Law and a Story of Restoration to Competency**
Meredith Smith
Chris Hodgson, Staff Attorney, Disability Rights NC
- 2:30pm Break**
- 2:45pm Mock Hearing**
Meredith Smith
- 4:25pm Evaluations; Wrap-up**
- 4:30pm Adjourn**

Any lunch or dinner provided as part of this program is paid for by the NC Judicial College or the Administrative Office of the Courts. When claiming reimbursement for expenses for this program, the portion of the daily travel allowance allocated for lunches provided by the program may not be claimed.

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