

## Incompetency & Adult Guardianship Proceedings for Clerks

April 26-28, 2023

### Wednesday, April 26

- 9:00 a.m.      **Check-in**
  
- 9:15 a.m.      **Welcome and Introductions**  
Meredith Smith, Associate Professor, UNC School of Government
  
- 9:45 a.m.      **The Clerk's Role in Adult Guardianship Proceedings**  
Meredith Smith, Associate Professor, UNC School of Government
  
- 11:00 a.m.     **The Role of the Guardian Ad Litem Attorney**  
Timothy Heinle, Civil Defender Educator, UNC School of Government
  
- 12:00 p.m.     *Lunch at the School of Government*
  
- 1:00 p.m.      **Screening the Case, Part 1**  
Meredith Smith
  
- 2:00 p.m.      *Break*
  
- 2:15 p.m.      **Screening the Case, Part 2**  
Meredith Smith
  
- 3:30 p.m.      *Break*
  
- 3:40 p.m.      **Interim Guardianship**  
Meredith Smith
  
- 4:30 p.m.      *Adjourn*

## Thursday, April 27

- 9:15 a.m.      **Recap and Discussion**  
Meredith Smith, Associate Professor, UNC School of Government
- 9:30 a.m.      **The Clerk's Authority to Order Access to Medical, Mental Health,  
and Substance Abuse Records**  
Mark Botts, Associate Professor, UNC School of Government
- 10:15 a.m.      *Break*
- 10:30 a.m.      **Multidisciplinary Evaluations**  
Meredith Smith  
Michelle Ball, Clerk of Superior Court, Johnston County
- 11:15 a.m.      **Adult Protective Services Records and the Role of the County Department of Social Services**  
Meredith Smith
- 12:00 p.m.      *Lunch at the School of Government*
- 12:45 p.m.      **Analyzing Capacity and Appointing a Guardian, Part 1**  
Meredith Smith
- 1:50 p.m.      *Break*
- 2:00 p.m.      **Analyzing Capacity and Appointing a Guardian, Part 2**  
Meredith Smith
- 2:50 p.m.      *Break*
- 3:00 p.m.      **Single Protective Arrangements and Single Transactions under G.S. 35A-1121**  
Catherine Wilson, Attorney, McPherson, Rocamora, Nicholson, Wilson & Hinkle, PLLC
- 4:00 p.m.      *Adjourn*

**Friday, April 28**

- 9:00 a.m.      **Recap and Discussion**  
Meredith Smith, Associate Professor, UNC School of Government
- 9:15 a.m.      **Receiving, Reviewing, and Compelling Status Reports**  
Meredith Smith, Associate Professor, UNC School of Government  
Preston Craddock, Adult Services Program Coordinator, Division of Aging & Adult Services, DHHS
- 10:45 a.m.      *Break*
- 11:00 a.m.      **Presiding Over Cases with Unrepresented Litigants**  
Beth Keever, Chief District Court Judge, retired
- 11:45 a.m.      *Lunch at the School of Government*
- 12:30 p.m.      **Effective Clerk Oversight of Guardians in Complicated Mental Health and Substance Use Cases:  
A Case Study**  
Meredith Smith  
Mark Botts
- 2:00 p.m.      *Break*
- 2:15 p.m.      **Restoration to Competency**  
Meredith Smith
- 3:15 p.m.      Wrap up; Evaluations
- 3:30 p.m.      *Adjourn*