

Incompetency & Adult Guardianship Proceedings for Clerks

April 15-17, 2026

Wednesday, April 15

- 9:15 a.m. **Check-in**
- 9:30 a.m. **Welcome and Introductions**
Meredith Smith, Associate Professor, UNC School of Government
- 10:00 a.m. **The Clerk's Role in Adult Guardianship Proceedings**
Meredith Smith, Associate Professor, UNC School of Government
- 11:15 a.m. *Break*
- 11:30 a.m. **The Role of the Guardian Ad Litem Attorney**
Timothy Heinle, Civil Defender Educator, UNC School of Government
- 12:30 p.m. *Lunch at the School of Government*
- 1:15 p.m. **Screening the Case, Part 1**
Meredith Smith
- 2:15 p.m. *Break*
- 2:25 p.m. **Screening the Case, Part 2**
Meredith Smith
- 3:00 p.m. *Break*
- 3:15 p.m. **Guardianship and Advanced Medical Planning: Capacity, Authority, and Coordination**
Professor Hugh M. Lee
- 4:30 p.m. *Adjourn*

Thursday, April 16

- 9:00 a.m. **Recap and Discussion**
Meredith Smith, Associate Professor, UNC School of Government
- 9:15 a.m. **Less Restrictive Alternatives to Guardianship**
Meredith Smith
- 10:15 a.m. *Break*
- 10:30 a.m. **Interim Guardianship**
Meredith Smith
- 11:10 a.m. *Break*
- 11:15 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
- 12:15 p.m. *Lunch at the School of Government*
- 1:00 p.m. **Multidisciplinary Evaluations**
Meredith Smith
- 2:00 p.m. *Break*
- 2:15 p.m. **Analyzing Capacity and Appointing a Guardian, Part 1**
Meredith Smith
- 3:15 p.m. *Break*
- 3:25 p.m. **Analyzing Capacity and Appointing a Guardian, Part 2**
Meredith Smith
- 4:45 p.m. *Adjourn*

Friday, April 17

- 8:45 a.m. **Recap and Discussion**
Meredith Smith, Associate Professor, UNC School of Government
- 9:00 a.m. **Single Protective Arrangements and Single Transactions under G.S. 35A-1121**
Meredith Smith
- 10:00 a.m. Break
- 10:15 a.m. **Effective Clerk Oversight of Guardians in Complicated Mental Health and Substance Use Cases:
A Case Study**
Meredith Smith
Mark Botts
- 11:30 a.m. *Lunch at the School of Government Break*
- 12:15 p.m. **Receiving, Reviewing, and Compelling Status Reports**
Meredith Smith
- 1:15 p.m. *Break*
- 1:30 p.m. **Restoration to Competency**
Meredith Smith
- 2:30 p.m. Wrap-up; Evaluations
- 2:45 p.m. *Adjourn*