

Incompetency & Adult Guardianship Proceedings for Clerks

April 24-26, 2024

Wednesday, April 24

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	[70 min]
10:55 a.m.	<i>Break</i>	
11:00 a.m.	The Role of the Guardian Ad Litem Attorney Timothy Heinle, Civil Defender Educator, UNC School of Government	[60 min]
12:00 p.m.	<i>Lunch at the School of Government</i>	
1:00 p.m.	Screening the Case, Part 1 Meredith Smith	[60 min]
2:00 p.m.	<i>Break</i>	
2:15 p.m.	Screening the Case, Part 2 Meredith Smith	[65 min]
3:20 p.m.	<i>Break</i>	
3:30 p.m.	Less Restrictive Alternatives to Guardianship Meredith Smith	[60 min]
4:30 p.m.	<i>Adjourn</i>	

Thursday, April 25

9:00 a.m.	Recap and Discussion Meredith Smith, Associate Professor, UNC School of Government	
9:15 a.m.	Interim Guardianship Meredith Smith	[60 min]
10:15 a.m.	<i>Break</i>	
10:30 a.m.	Multidisciplinary Evaluations Meredith Smith Michelle Ball, Clerk of Superior Court, Johnston County	[40 min]
11:10 a.m.	<i>Break</i>	
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	[45 min]
12:00 p.m.	<i>Lunch at the School of Government</i>	
1:00 p.m.	Analyzing Capacity and Appointing a Guardian: Part 1 Meredith Smith	[105 min]
2:45 p.m.	<i>Break</i>	
3:00 p.m.	Single Protective Arrangements and Single Transactions under G.S. 35A-1121 Catherine Wilson, Attorney, McPherson, Rocamora, Nicholson, Wilson & Hinkle, PLLC	[55 min]
3:55 p.m.	<i>Break</i>	
4:00 p.m.	Presiding Over Cases with Unrepresented Litigants Beth Keever, Chief District Court Judge, retired	[45 min]
4:45 p.m.	<i>Adjourn</i>	

Friday, April 26

9:00 a.m.	Recap and Discussion Meredith Smith, Associate Professor, UNC School of Government	
9:15 a.m.	Analyzing Capacity and Appointing a Guardian: Part 2 Meredith Smith	[90 min]
10:45 a.m.	<i>Break</i>	
11:00 a.m.	Receiving, Reviewing, and Compelling Status Reports Meredith Smith	[45 min]
11:45 a.m.	<i>Lunch at the School of Government</i>	
12:30 p.m.	Effective Clerk Oversight of Guardians in Complicated Mental Health and Substance Use Cases: A Case Study Meredith Smith Mark Botts	[90 min]
2:00 p.m.	<i>Break</i>	
2:15 p.m.	Restoration to Competency Meredith Smith	[60 min]
3:15 p.m.	Wrap up; Evaluations	
3:30 p.m.	<i>Adjourn</i>	