
**PROBATE COURT
VOLUNTEER VISITORS PROGRAM**

AN IMPLEMENTATION HANDBOOK

*Prepared for
The Administrative Office of
The Courts of Georgia*

by

The National Center for State Courts

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GA-AOC Seal



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COURT VISITOR PROGRAM PLANNING COMMITTEE

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DeKalb County Probate Court
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What is a Volunteer Visitor Program?

Volunteer Visitor Programs are Probate Court-sponsored efforts to enhance the Court's capacity to monitor the care, condition, and assets of incapacitated adults, and to assist guardians¹ in fulfilling their reporting responsibilities. These Programs utilize the donated time and energy of members of the community served by the Probate Court to:

- ✓ Assure proper care and protection for incapacitated adults
- ✓ Ensure the accuracy and completeness of Annual Returns
- ✓ Reconnect the Court with incapacitated adults subject to guardianship orders with whom the Court has lost contact
- ✓ Assist and support guardians in meeting their duties to incapacitated adults and their reporting responsibilities to the Court
- ✓ Make certain that Court guardianship records are accurate and complete

Volunteer Visitor Programs may be managed directly by the Court or through a partnership with a community organization or the local bar.

Why establish a Volunteer Visitor Program?

Although most Probate Courts, in Georgia and elsewhere, monitor guardianship cases to some extent, few have been able to monitor all their guardianship cases as fully as they would like, due to a lack of time and resources. Moreover, many caring guardians have difficulty preparing Annual Returns and Personal Status

¹ The term guardian refers to both guardians of the person and to conservators.

Reports in a timely and complete manner. A Volunteer Visitor Program is an effective way that Probate Courts in Georgia and other states have found to enhance their capacity to monitor cases and to assist guardians, without substantially increasing their staff and budgets.

Is managing a Volunteer Visitor Program difficult?

It is true that volunteers are not free. Volunteers require supervision, support, and staff time in order to perform well. Clear expectations must be established regarding schedule, assignments, timely completion of reports, scope of responsibilities, and appropriate and inappropriate conduct. However, when a Probate Court has identified the need to monitor guardianship cases more closely, using volunteers has been proven to be a cost-effective way of doing so. For example, volunteers provided 3-5 hours of service for every hour of staff time during a guardianship monitoring project organized by AARP several years ago.

In order to lessen the administrative burden of recruiting, screening, training, and overseeing volunteers and to assure adequate liability protection, several Georgia Probate Courts have entered into partnerships with community organizations or bar groups to provide and supervise the volunteers. The Probate Court of DeKalb County is working with Senior Connections; the Athens Community Council on Aging, Inc. manages the volunteer visitors for the Clarke County Probate Court; and the Fulton County Probate Court has enlisted the aid of major Atlanta law firms to recruit paralegals who volunteer to review Annual Returns and assist guardians in preparing them.

How can my Court start a Volunteer Visitor Program?

Who needs to be involved? When beginning a Volunteer Visitor Program, it is best to start with a core group rather than reaching out to all the officials and groups in the community who may be interested or affected by the Program. That core group might include:

- ✓ The Probate Court Judge
- ✓ A Clerk of the Probate Court
- ✓ A representative from:
 - * the most likely funding source(s)
 - * a community volunteer organization
 - * the primary agency (agencies) that provides services to incapacitated adults in the County

Among others who could be consulted by or added to the core planning group are:

- ✓ Bar representatives
- ✓ Guardians or the local guardians association, if any
- ✓ Disabilities organizations and organizations for older persons
- ✓ Hospitals, nursing homes, and other care providers
- ✓ Local colleges and universities with social work, nursing, gerontology, or other relevant degree programs

Where can the Court find volunteers? There are many agencies, institutions, and organizations in each County that could serve as sources for volunteers. Because incapacitated persons are likely to be scattered throughout every segment of the community, it is essential for ensuring communication among visitors, incapacitated persons, and guardians, to tap multiple sources when recruiting volunteers in order to secure a

diverse group of volunteers in terms of age, race, ethnicity, language skills, gender, location, and knowledge of disabilities and mental illnesses. Potential sources of volunteers include, but are not limited to:

- ✓ The County child and family coalitions that allocate child and family related grant funds
- ✓ Mental health departments
- ✓ Universities, community colleges, and technical colleges
- ✓ Local Councils on Aging
- ✓ Volunteer organizations
- ✓ Associations for persons with a disability or mental illness (e.g., local chapters of The ARC, Mental Health Association, and Alzheimers Association)
- ✓ Senior and retired citizen associations and volunteer programs
- ✓ Senior Centers
- ✓ Civic clubs and associations
- ✓ Faith-based organizations
- ✓ Local bar associations and law firms
- ✓ Historical and genealogical societies (especially for determining which incapacitated persons with whom the Court has lost contact may have died)
- ✓ Scouts and high school service clubs (especially for assistance in readying the Court's guardianship files)

How many volunteers will be needed?

The number of volunteers is determined by the number of active cases and the duties that the volunteers will perform. Many Probate Courts around the US are not able to determine easily how many guardianship cases are active, what the current address and telephone number of the guardian and incapacitated person is in each case, and whether an Annual Return and Personal Status Report has been filed for the most recent

reporting period. Accordingly, in order to obtain an accurate count of the active cases, a necessary first step is to review, organize, and update the guardianship files. (A few volunteers can be used to assist the Clerk with this process.)

Once the number of active cases is determined and the Court has decided whether volunteers will

- ✓ Visit all guardians and incapacitated persons or only those in a specific subset of cases,
- ✓ Serve as the equivalent of a Court Appointed Special Advocate (CASA) for a person alleged to be incapacitated,
- ✓ Review Annual Returns,
- ✓ Assist conservators in preparing Annual Returns,
- ✓ Assist in keeping guardianship records current, and/or
- ✓ Perform other functions,

a rough estimate can be made of the average time needed to perform each set of responsibilities, and these averages multiplied by the number of active cases in each category.

The final step in determining how many volunteers will be needed is to divide the estimate of the total number of hours needed by average time to be donated. Generally, volunteers can be asked to donate 8-10 hours each month for 10 months each year.

For example:

- ✓ If the Court has 100 active cases,
- ✓ If volunteers will be asked to visit the guardian and incapacitated person in each case once each year, and
- ✓ If conducting these visits and preparing a report will require 4 hours on average,

✓ Then at least 5 volunteers will be needed.

100 cases x 4 hours/case divided by 80 annual hours of volunteer time = $400/80 = 5$.

What are the qualifications for volunteers?

Current Programs have identified the following set of key qualifications for volunteer visitors:

- ✓ The ability to interact comfortably with people who have significant physical and mental impairments
- ✓ The ability to engage and communicate with people who come from varying socioeconomic backgrounds
- ✓ The ability to remain objective and non-judgmental in making reports to the Court
- ✓ The ability to preserve client confidentiality
- ✓ The ability to maintain a professional composure
- ✓ No record of prior conduct that would pose a threat to the physical or financial security of incapacitated persons and guardians or the integrity of the program (e.g., illegal drug use; convictions for violent crime, burglary, theft, fraud, or driving under the influence)

How should volunteers be selected? Often, finding people willing to volunteer is easy, but identifying those best able to serve as court visitors is more challenging. Investing time into winnowing out those who are not suitable at the beginning, will save time and avoid problems in the long-run. Conducting a formal selection process also tells potential volunteers that being a volunteer visitor is an important responsibility that the Court takes seriously.

Among potential problems to watch for, are individuals who:

- ✓ Have difficulty communicating orally **or** in writing

- √ See themselves as advocates rather than helpers
- √ May have difficulty remaining objective and impartial

Many current Programs use a multi-step process to select volunteers in which both the Court and the organization, agency, or educational institution that is coordinating the program, participate. It is important, at the outset to define which of the following tasks each will perform.

- √ Providing those interested in volunteering with an application form and written information regarding the role, responsibilities, and qualifications of volunteer visitors, and the anticipated time commitment
- √ Reviewing the applications to determine whether the applicants meet the basic qualification criteria and can communicate clearly in writing
- √ Conducting personal interviews to provide applicants with additional information about the program, respond to questions and concerns, and assess the applicants' motivation, time availability, familiarity with people who have significant physical and mental impairments, and personality characteristics pertinent to the job
- √ Obtaining fingerprints and initiating criminal background and reference checks for candidates who pass the initial screening, and, for those who would be reviewing Annual Returns, credit checks as well
- √ Conducting personal interviews with the candidates who have been screened and recommended to:
 - * further explain the program and its operations,
 - * discuss the sensitivity and confidentiality of the information that they may receive and have access to as court visitors, and

- * assess how well each candidate is likely to fill the role and meet the responsibilities of a Volunteer Visitor
- ✓ Requiring accepted candidates to:
 - * receive training before they start their duties
 - * provide proof of automobile insurance coverage
 - * sign a:
 - waiver of liability
 - statement that they have reviewed and agreed to abide by the applicable ethical and confidentiality standards, and
 - statement that they agree to abide by the Court's drug-free workplace policy and are willing to undergo drug and alcohol screening in accordance with that policy

How should volunteers be trained? Initial training is essential. However, volunteer visitors do not need to be experts on guardianship law, all types of disabilities, and all the services available in the community. A good initial training program will inform new volunteer visitors about: what the Program is, with whom the volunteers will be interacting, what they are expected to do, what situations and problems they are likely to encounter, and what the ground rules are. More specifically, a typical initial training program contains:

- ✓ An introduction to the Probate Court and the basic precepts, definitions, and procedures of Georgia guardianship law, including the standards for appointment and the obligations of guardians and the rights of incapacitated persons
- ✓ An explanation of the most common physical and mental disabilities of people under guardianship and how those disabilities are typically manifested

- ✓ A discussion of the ethical rules that apply to Volunteer Visitors and the confidentiality requirements that they must follow
- ✓ An explanation of the administrative procedures to be followed including how to sign in and out, what expenses are reimbursable, and how to get reimbursed for them

The training for volunteers who will be visiting guardians and incapacitated persons might also include:

- ✓ A description of how to schedule and conduct a visit including how to act, what to ask, what to look for, how to deal with guardians and incapacitated persons, and what to do if there is an emergency
- ✓ Information regarding the various types of living situations and family structure the volunteers may encounter
- ✓ Guidance in applying standard criteria appropriately and objectively
- ✓ Instructions on how to prepare a report for the court including what information to provide and when and to whom it should be submitted
- ✓ An outline of the public and private services available in the County for seniors and persons with disabilities
- ✓ Tips for assuring personal safety

The training for volunteers who will be auditing or assisting guardians with completing Annual Returns might include:

- ✓ An explanation of the information to be entered on an Annual Return
- ✓ A list of the common errors or omissions
- ✓ Instructions on the procedures when an omission, arithmetical error, or other problem is found
- ✓ Suggestions on how to deal effectively with guardians

The training for volunteers who will be helping the Court in updating its files, could cover:

- ✓ Guidance on the proper handling of case files
- ✓ An explanation of the process for checking whether a death certificate has been filed for an incapacitated person and for conducting an internet search to determine if the addresses in the court file for guardians and incapacitated persons are current
- ✓ Instructions on the procedures to follow when more current information is found.

Training programs are most effective when a variety of teaching methods are employed. Some approaches that will enhance the learning experience and make it more enjoyable are: role playing on how to conduct a visit and deal with a hostile guardian or taciturn incapacitated person; hypothetical discussion questions regarding ethical issues; and sample reports to complete. In addition, new volunteers should accompany more experienced volunteers or supervisors on one or two visits before conducting any on their own.

It is not necessary for the Probate Judge, Court personnel, and the Program Director to offer all the presentations. Other speakers may include representatives from the Court, the volunteer organization, local colleges, and service providers, and the Public Guardian Office. Handouts should include:

- ✓ Lecture outlines
- ✓ Paper for taking notes
- ✓ A glossary of relevant legal, medical, and mental health terms
- ✓ Relevant forms and policies

- ✓ A list of available hotlines, and health, mental health, and social services
- ✓ A list of the telephone numbers and e-mail addresses of the individuals to whom the volunteers will be reporting, and
- ✓ A county road map

How much funding will be needed? The most significant cost for a volunteer program is the staff time required to manage the program. The amount of staff time that will be needed is directly related to the number of volunteers. Experience suggests that existing staff (whether at the Court or a volunteer agency) can usually manage up to 10 volunteers without interfering with their normal duties. Programs with 10-25 active volunteers function best with a half-time volunteer coordinator. Larger Programs may require a full-time coordinator. These estimates can be reduced, to some extent, if some volunteers assist with administrative tasks such as pulling files, preparing cases for monitoring, and other basic administrative tasks.

Other possible cost items needed to operate a Volunteer Visitor Program are:

- ✓ Space
- ✓ Computers and software
- ✓ Furniture and filing cabinets
- ✓ Postage
- ✓ Supplies
- ✓ Telephone service
- ✓ Copying capacity
- ✓ Mileage and parking
- ✓ Volunteer recognition
- ✓ A newsletter or other communication mechanism
- ✓ Supervision
- ✓ Background checks

- ✓ Drug tests
- ✓ Liability insurance

In assessing the costs of a Volunteer Visitor Program, however, the potential benefits and cost-savings should be considered as well, although they may be difficult to measure. These include:

- ✓ Lessening the burden on guardians
- ✓ Helping courts to fulfill their responsibilities more effectively
- ✓ Catching problems early, thereby avoiding the need for court hearings and institutionalization

What are the possible sources of funds to support a Volunteer Visitor Program? There are several state and local, public, and private potential sources of financial or in-kind support. Because Volunteer Visitor Programs are likely to serve many age groups and types of disabilities, funding support for the Programs must be flexible and several types of funding may be needed. Among the possible sources of funding are:

- ✓ The Division of Mental Health, Developmental Disabilities, and Addictive Diseases of the Georgia Department of Human Resources
- ✓ The Division of Aging Services of the Georgia Department of Human Resources
- ✓ Local Agencies on Aging
- ✓ The Corporation for National and Community Service (RSVP)
- ✓ County Commissions
- ✓ The United Way
- ✓ Faith-based organizations
- ✓ Local foundations
- ✓ Social work, nursing, and gerontology departments of colleges and universities

✓ Institute for Geriatric Social Work (IGSW) grants

What about confidentiality? Volunteer visitors are likely to be exposed to a substantial amount of confidential information regarding the medical/mental health and financial conditions of incapacitated persons. Both initial and follow-up training must emphasize that maintaining client confidentiality is essential and explain the federal (e.g., HIPAA), state, and court rules regarding disclosure of personal, medical, and financial information. One effective approach may be discussion of a series of scenarios illustrating inadvertent breaches of confidentiality. To reinforce this training, all volunteers should be required to sign a statement acknowledging that they have read the confidentiality requirements and agree to adhere to them, and the Volunteer Visitor Program may wish to adopt the practice of not mentioning the names of guardians and incapacitated persons' informal conversations.

Are there liability concerns? There are several potential sources of liability arising from a Volunteer Visitor Program. They may include but not be limited to:

- ✓ Intentional acts, and unintentional errors and omissions committed by volunteers
- ✓ Acts committed against volunteers
- ✓ Accidental injuries to volunteers
- ✓ Loss or damage to volunteers' property in the course of their duties

Because volunteers assisting the Courts are not considered under Georgia law to be unpaid public employees covered by judicial immunity or workers compensation, Courts may wish to explore establishing partnerships with organizations that can provide liability insurance.

What are the first steps my Court should take to Implement a Volunteer Visitor Program?

Define the duties of the volunteer visitors. The Court and the organization, agency, or educational institution that will be managing the volunteers should develop a list of the duties and responsibilities that volunteers will be expected to perform. For example, the duties applicable to all volunteers might include:

- ✓ Completing orientation and training
- ✓ Reviewing assignments with the Program director
- ✓ Updating addresses and phone numbers of incapacitated persons and guardians
- ✓ Completing assignments in a timely manner and in accordance with court procedures
- ✓ Maintaining an accurate record of time contribute

The duties of volunteers who will be visiting incapacitated persons and guardians can encompass:

- ✓ Communicating directly with the guardians
- ✓ Visiting incapacitated persons at their place of residence
- ✓ Assisting the guardian, if necessary, in completing a Personal Status Report regarding the incapacitated person
- ✓ Advising guardians when their Annual Return is or was due
- ✓ Completing a Visit Assessment Report
- ✓ Returning the Visit Assessment Report to the Program Director
- ✓ Reporting in a timely manner to the Program Director any problems with assignments

Among the specific duties of volunteers reviewing Annual Returns are:

- ✓ Reviewing Annual Returns and related financial records, noting any arithmetical errors, omissions, or other problems on a standard form
- ✓ Reporting problems in a timely manner to the Program Director
- ✓ Following-up on cases as requested by the Program Director
- ✓ Assisting guardians in completing Annual Returns

For volunteers assisting the Court to update its files, the list of specific duties could cover:

- ✓ Confirming or serving as a resource for obtaining the status and current contact information for guardians and the incapacitated persons
- ✓ Placing loose reports or other documents securely in the files in the proper place and order
- ✓ Updating the files as necessary
- ✓ Returning the file in a timely manner to the Program Director or the Clerk, and
- ✓ Contacting guardians with a delinquent Annual Return to remind them to file the document promptly

Define the duties of the Program Director. It is also prudent for the Court and the organization that will be managing the volunteers to develop a list of the duties and responsibilities for the Director of the Volunteer Visitor Program. These might include:

- ✓ Recruiting, screening, and recommending volunteers
- ✓ Coordinating the training of volunteers
- ✓ Scheduling volunteers
- ✓ Monitoring performance of volunteers
- ✓ Ensuring that case assignments are completed in a timely manner

- ✓ Reporting case-related problems to the Court in a timely manner
- ✓ Providing feedback to volunteers
- ✓ Maintaining data on program performance and reporting on performance to the Court
- ✓ Developing, overseeing, and reporting on the Program budget

Establish operating procedures. To ensure smooth operation of the Program, it is necessary to have a clear set of operating procedures that cover such topics as:

For all volunteers:

- ✓ The process for scheduling volunteers
- ✓ How volunteers receive case or work assignments
- ✓ How and to whom to file reports
- ✓ How and to whom to report emergencies or lesser problems

For volunteers who be visiting guardians and incapacitated persons:

- ✓ How to contact guardians
- ✓ What to do and look for during a visit
- ✓ How and under what circumstances should a volunteer visitor contact agencies or individuals providing services to the incapacitated person

For volunteers reviewing Annual Returns:

- ✓ How to contact conservators and other information sources
- ✓ The proper process for correcting errors or omissions

For volunteers assisting with keeping the Court's guardianship files current:

- ✓ How to can gain access to guardianship files
- ✓ Where they may be taken
- ✓ What if anything may be copied
- ✓ The process for updating or correcting information in a file, and
- ✓ To whom a file is to be returned

How will the Court know if the Volunteer Visitor Program is effective?

Establishing a Volunteer Visitor Program is an important and very visible undertaking. It is essential that the Court is able to determine whether the program is operating as intended (a process evaluation) and what affect it is having (an outcome evaluation). The best time to think through the evaluation criteria and develop a means for collecting the information needed to measure whether those criteria are being met is at the beginning of a program, rather than when a problem arises or just before the decision on funding will be made.

Among the process evaluation measures that a Court may want to use are:

- ✓ How many volunteers were selected
- ✓ How many volunteers were trained
- ✓ How many hours of training were provided
- ✓ What were the number of hours contributed by volunteers
- ✓ What percentage of volunteers continued serving for one year
- ✓ How many visits were conducted
- ✓ How many Annual Returns were reviewed
- ✓ How many guardianship files were updated
- ✓ How many guardians were assisted

- ✓ How satisfied were the volunteers, guardians, and service providers with the program and what suggestions did they have for improving it
- ✓ What was the cost of the program per visit conducted, per Annual Return reviewed, and per file updated

Possible outcome measures include:

- ✓ A decrease in the number of letters and citations sent to guardians of estates (when volunteers assist the guardians in preparing the Annual Return)
- ✓ An increase in the number of letters and citations sent to guardians of incapacitated persons (when volunteers serve as visitors)
- ✓ An increase in the percentage of guardians in contact with the Court
- ✓ The number of problem situations corrected
- ✓ An increase in referrals for services
- ✓ The number of guardians removed
- ✓ A decrease in the number of delinquent Personal Status Reports and Annual Returns
- ✓ An increase in the review and timeliness of review of Annual Returns
- ✓ The number of guardianship orders modified
- ✓ The number of volunteers who completed their obligations
- ✓ An increase in the percentage of files with current information

In evaluating the results, it is important to remember that it is not only data but also the impact on people's lives that illustrate the effectiveness of the Program. Neither data nor anecdotes by themselves will convey what a Volunteer Visitor Program is accomplishing; together, they can offer a clear and powerful message.

SAMPLE FORMS

***Memorandum of Understanding between the
Court and Volunteer Organization***

Volunteer Visitor Job Description

Volunteer Application Form

Ethics Code & Confidentiality Statement

Substance Abuse Policy Statement

Court Visitor's Report – example 1

Court Visitor's Report – example 2

Court Visitors Form Checklist

Orientation Outline – example 1

Orientation Outline – example 2

**MEMORANDUM OF UNDERSTANDING
Court Visitor Program**

Whereas [Agency] desires to participate in the Court Visitor Program (the Program) with the Probate Court of _____ County (the Court), the parties hereby enter into this agreement on the _____ day of _____, 200_.

The duration of this agreement is one year.

The parties agree to abide by the following basic provisions:

[Agency] will:

1. Provide Court Visitor volunteers.
2. Recruit, interview, and enroll volunteers for the Program, providing the Court a copy of each volunteer's confidentiality statement.
3. Provide an orientation and training course that will adequately prepare volunteers to perform their duties, which are:
 - a. To update contact information for wards and their guardians;
 - b. To contact the guardian directly for an appointment to visit the ward;
 - c. To visit the ward at his place of residence;
 - d. To assist the guardian in completing a Personal Status Report;
 - e. To complete a Court Visitor's Report;
 - f. To submit the originals of both reports to the Court, making no copies; and
 - g. To maintain a time record of volunteer hours.
4. Accept full responsibility for assigning visits and returning completed reports to the Court in a confidential and timely manner.
5. Provide day-to-day supervision of volunteers.

[Agency]

Name

Title

Date

Probate Court of _____ County

Name

Title

Date



The Court Visitor Volunteer Assignment Description

OBJECTIVE: To provide the court, in a confidential manner, first hand information about the ward's personal situation and the care that is being provided to the ward by the guardian.

QUALIFICATIONS:

Ability to interact comfortably with people who have significant physical and mental impairments.

Ability to engage people who come from varying socioeconomic backgrounds.

Ability to remain objective and non-judgmental in making reports to the court.

Ability to maintain Client Confidentiality.

Must maintain a professional composure.

RESPONSIBILITIES:

Contacting the court appointed guardian of the ward.

Visiting the ward at the ward's place of residence in the presence of the guardian.

Assisting the guardian in completing the Personal Status Report (if needed).

Completing a Court Visitor's Report on the visit.

Providing up to date contact information on both the guardian and the ward.

Maintaining the confidentiality of the guardianship.

TRAINING: All volunteers must attend initial orientation and an additional training with the court.

TIME REQUIRED: At least 8-10 hours/month for one year.

SUPERVISOR: Director of Volunteer Resources



COURT VISITOR VOLUNTEER APPLICATION FORM

Name:

Last, First, M.I.

1. What interests you about the volunteer position you have designated?

2. What life experiences have you had which relate to this volunteer position? (i.e., care of elderly or developmentally disabled relative or friend, extended educational studies in this area of interest)

3. Please check what your current status is:

- Student Retired Seeking employment
 Employed

4. Please describe your employment history

Name of Employer Position Held Dates of Employment

1. _____

2. _____

3. _____

5. Please check the highest educational level completed:

- High school Some college or technical training
 College/University Advanced degree

6. Please list any education or courses which are specifically related to the volunteer position:

Court visitors are asked to make a one-year commitment. Barring unexpected emergencies, are you willing and able to commit to the duration expected of you?

- Yes, I am willing to commit for one year.
 No, I can only commit to _____. (# of months)

Please include any other information you would like here.

Due to the sensitive nature of these positions, the court may do a background records check on qualified applicants. If you agree, please write your social security number in the space below.

Signature _____ Date _____

CODE OF ETHICS & CONFIDENTIALITY STATEMENT

Code of Ethics

All employees, volunteers, and contractors of _____ are prohibited from:

- › Using the clients' car for personal reasons
- › Consuming the clients' foods or beverages
- › Using the clients' telephone for personal calls
- › Discussing political or religious beliefs, or personal problems with the client
- › Accepting gifts or financial gratuities (tips) from the client or client representative
- › Lending money or other items to the client; borrowing money or other items from the client or client representative
- › Selling gifts, food, or other items to or for the client
- › Purchasing any item for the client unless directed in clients' care plan
- › Bringing other visitors (i.e.: children, friends, relatives, pets, etc.) to the clients' home
- › Smoking in the clients' home, with or without permission from the client or client representative
- › Reporting for duty under the influence of alcoholic beverages or illegal substances
- › Sleeping in the clients' home
- › Remaining in the clients' home after services have been rendered
- › Misrepresentation of the agency in a deceitful manner to confuse and guide client in order for self gain.

Confidentiality Statement

Your job may entail working with some personal client information. It is imperative that this information be kept strictly confidential. This confidential information should be discussed only with people who are authorized to receive this information. Under no circumstances should you reveal any of this information to those unauthorized to receive it. Confidentiality is of utmost importance.

Therefore, a violation of these guidelines may result in disciplinary action up to and including immediate termination.

I have read the CODE OF ETHICS & CONFIDENTIALITY STATEMENT and agree to the above stated policies.

Name

Date Signed

SUBSTANCE ABUSE POLICY STATEMENT

The [Agency] is committed to providing a safe work environment and to fostering the well-being and health of its volunteers. That commitment is jeopardized when any volunteer illegally uses drugs or alcohol on duty; reports for duty under the influence; possesses, distributes, or sells drugs while on duty; or abuses alcohol while on duty. Therefore, the [Agency] has established the following Substance Abuse Policy:

It is a violation of organization policy for any volunteer to use, possess, sell, trade, offer for sale, or offer to buy illegal drugs or otherwise engage in the illegal use of drugs or alcohol while on duty.

It is a violation of organization policy for anyone to report for duty under the influence of illegal drugs.

It is a violation of organization policy for anyone to use prescription drugs illegally.

The consumption or possession of alcoholic beverages while on duty is prohibited. A volunteer whose normal faculties are impaired due to the consumption of alcoholic beverages, or whose blood alcohol level tests positive while on duty, shall be guilty of misconduct, and shall be subject to termination.

Failure to submit to a substance abuse test is misconduct. Time of submission shall be within 24 hours or as specified at the time of the drug screening request. Failure to comply shall be a reason for termination.

As a condition of serving as a volunteer, volunteers must abide by the terms of this policy and must notify the

_____[Agency]_____ in writing of any conviction of a violation of a criminal drug statute occurring while on duty no later than five calendar days after such conviction.

In accordance with the Georgia State Laws prohibiting the operation of a motor vehicle while under the influence of mood altering chemicals, any volunteer in violation of this substance abuse policy shall be subject to immediate termination if his or her duties include operation of an organization vehicle or other vehicle while on duty.

I have read the SUBSTANCE ABUSE POLICY STATEMENT and agree to the above stated policies.

Name **Date Signed**

Court Visitor's Report – Example 1

Ward's Name and Address: County:	Guardian's Name and Address: Phone:
Estate No.	Date of Visit:

Assessment of Ward's Residence:

I was not able to visit the ward at her/his place of residence because:

I visited the ward at her/his place of residence and found the living conditions to be as follows:

Assessment of the Guardianship:

I recommend that the Court accept the PSR as filed by the Guardian.

I recommend that the Court further investigate this guardianship.

Report:

I hereby agree to maintain the confidentiality of any and all information I have or know of in regards to the above named Ward and Guardian.

Court Visitor Date
Phone _____ - _____ - _____

Court Visitor's Report – Example 2

Ward's Name and Address: County:	Guardian's Name and Address: Phone:
Estate No.	Date of Visit:

Assessment of Ward's Residence:

- I was not able to visit the ward at her/his place of residence because:

- I visited the ward at her/his place of residence and found the living conditions to be as follows:

Assessment of Ward's Safety:

- I did not see any reasons to be fearful for the ward's safety.
- I saw something that caused me concern about the possibility of abuse and neglect.

Assessment of the Guardianship:

- I recommend that the Court accept the PSR as filed by the Guardian.
- I recommend that the Court further investigate this guardianship regarding: (check all that apply)

- incapacitated person's circumstances or condition
- guardian's circumstances or condition
- incapacitated person's property or finances

Report:

I hereby agree to maintain the confidentiality of any and all information I have or know of in regards to the above named Ward and Guardian.

_____ Date

Court Visitor

Phone - _____ - _____

Training Packet Checklist

- Agenda
- Volunteer Organization Brochure
- Application
- Court Visitor Brochure
- Volunteer Assignment Description
- Volunteer Application
- Code of Ethics/Confidentiality Statement
- Confidentiality Statement
- Community Resource List
- Referral Form
- Personal Status Report
- Court Visitor's Report
- Guardian Handbook

Orientation Outline – Example 1

Volunteer Organization Director

- Introductions
- General Overview of organization programs and services
- Background check
- Hours report
- Explanation of the Court Visitor's Information Packet
 - Volunteer assignment description
 - Volunteer Application
 - Code of Ethics & Confidentiality Statement
 - Court Visitor's Report
 - Personal Status Report

Probate Court Judge

- Handbook for Guardians
- Guardianship Law
- Personal Status Report
- Court Visitor's Report
- Case Assignment
- Form Reporting
- Emergency Contacts

Volunteer Organization Deputy Director

- Follow up services
 - Community Resource List
 - Referral Form
- When Problems Occur
- Basic Safety Issues

Orientation Outline – Example 2

1. Purpose
 - a. Monitoring by Court
 - b. Completion of PSR
 - c. Court Visitor Report – objectivity
 - d. Modification of Guardianship

2. Legal Overview
 - a. Guardian’s Oath
 - b. Handbook for Guardians
 - c. Georgia Law

3. How to
 - a. Selection of Cases
 - b. Assignments
 - c. Procedures with Guardian and Ward
 - d. Submitting Reports – no copies, originals

4. Safety
 - a. Personal Safety
 - b. Public Relations
 - c. Confidentiality

5. Auxiliary Services
 - a. Senior Programs
 - b. Court Orders
 - c. Adult Protective Services
 - d. Other