



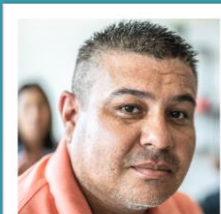
Great guardians bring skills and tools to the start of a new working relationship. Professional guardians have their favorite documents and preferred ways to begin, but may easily skip over some important tasks in haste or through lack of coaching.

Family or new guardians can be overwhelmed by a list of tasks and be unclear about the order of importance. Without guidance, steps can be missed that lead to mistakes later on.

This training was designed as part of our “Guardianship Basics Curriculum.” But please don’t think it is only for rookies. Here you will see tools or job aids in action. You can choose to download any and all of them.

## **Guardians are Decision-Makers**

*For adults who need decisional-support urgently or long-term*



**Ben Ballesta**  
39 years old

**Referred by Attorney**  
after arrest, rehab, relapse,  
diagnosed with schizophrenia,  
about to be released



**Candida Charles**  
31 years old

**Referred by DDS**  
after sudden death of  
her aunt/guardian,  
difficulties with speech,  
walking, memory, lives in  
group home since age 20



**Diana Dawes**  
66 years old

**Referred by Hospital**  
BIBA unconscious,  
ketoacidosis,  
gangrenous left foot,  
no apparent medical attention  
for decades

The first 60 days is rarely a casual “get to know you” period. Courts expect Guardians to take control and help the person immediately. This training provides steps, tools + skills.

In this virtual instructor-led training, we cover 3 large topics that answer the question “*What needs to happen to save a person’s life, or help someone’s life improve?*”

1. **Understand Your Appointment.** Actions you may take before accepting the guardianship and ideas for getting organized before your first meeting with a new client.
2. **Person-Centered Planning.** Many actions and activities that help you make on-point decisions for each specific client.
3. **Make Urgent Decisions.** How to analyze problems that need urgent attention, document your decision-making process, and explain how you made your decisions in case you need to in the future.

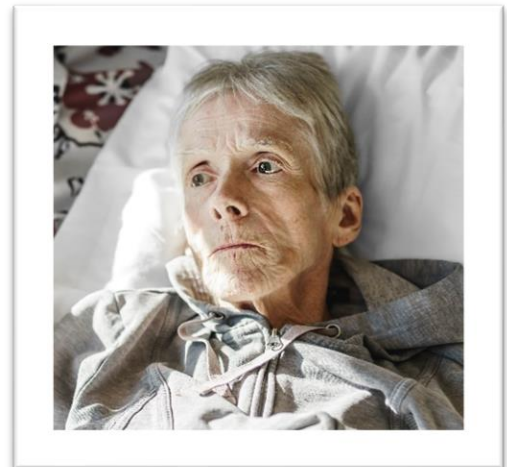
### 1-Understand Your Appointment

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If you are lucky enough to receive pre-appointment information, you may be able to request specific powers or actions be added to the order/decreed. Without this advance input, Guardians need to look closely at your decree or order when you receive it.

#### **TAKE ACTION IMMEDIATELY**

- ✓ Begin to organize information into a face sheet/fact sheet electronic form or app.
- ✓ This can cue you to ask for facts, documents and contacts so you can begin to understand this new client.
- ✓ Evidence of incapacity, petition, proposed decree, list of Diana’s people with contact info, ID number for Diana, her home address, etc.
- ✓ Take opportunity to have edits and corrections made to the proposed decree before court hearing, when possible.



#### **ORGANIZE WHAT YOU KNOW SO FAR INTO A SINGLE DOCUMENT, APP, OR PROGRAM**

Make it easy to find names, numbers, and facts all in one place.

On the next two pages you will see the document Diana’s guardian selected. It is an excel spreadsheet called a Face-Fact Sheet.

You may download this tool and use it for your own guardianship cases in Excel format or pdf format.

<https://training.guardianshipcenter.org/catalog/info/id:149>

- 66F
- BIBA to ED unconscious from apartment 4 days ago
- Diagnosed with type 2 diabetes
- Gangrene in left foot
- Cataracts
- Condition stable, foot amputation recommended
- Ex-husband local
- No children
- Room 1608

Guardianship Face-Fact Sheet

PERSONAL INFORMATION			
Person's Name	Diana Dawes	Phone	555-444-9999
Street Address	1000 Epping Way #3203	Email	
City, ST Zip	Derby, MA 55555	Other Contact Info	
Date of Birth	1/1/1958	SSN	555-111-2222
Intake date address/contact Derby Regional Hospital, Social Worker - Marilyn M, 555-909-0022; Diana in rm 1608			
Insurance Name	Medicare	Insurance ID#	MDC5555
Medicaid #		Medicare #	M55555555
Income		Income Source	SS and Pension
Education			
Military Service		Branch of Service	
<input type="checkbox"/> YES <input type="checkbox"/> NO			
Dates of Service			
Code Status <input checked="" type="checkbox"/> Full Code <input type="checkbox"/> DNR <input type="checkbox"/> DNI <input type="checkbox"/> DNH <input type="checkbox"/> CMO			
If not Full Code, date of Authority to consent to code change:			
Notes on Individual's Preferences, Habits and Current Situation			

Page 1 of 4

Guardianship Face-Fact Sheet

FAMILY + FRIENDS			
Marital Status <input type="checkbox"/> Married <input checked="" type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Never Married			
Spouse Name		Spouse Phone	
Spouse Street Address		Spouse Email	
Spouse City, ST, Zip		Spouse Other Contact Info	
Emergency Contact Info			
Important Contact Name	Davina Deveraux	Important Contact Phone	555-888-8888
Important Contact Street Addr	14 Mulberry Lane	Important Contact Email	
Important Contact City, ST, Zip	Toppam, MA 01555	Important Contact Other Contact Info	
LIVING ARRANGEMENTS			
Lives Alone or Not <input checked="" type="checkbox"/> Alone <input type="checkbox"/> With Family <input type="checkbox"/> With Non-Family <input type="checkbox"/> In Facility			
Facility Type <input type="checkbox"/> Nursing Home <input type="checkbox"/> Rest Home <input type="checkbox"/> Assisted Living <input type="checkbox"/> Group Home			
Facility Name		Facility Phone	
Facility Address			
Facility Nurse		Nurse Contact Info	
Social Worker		Social Worker Phone	
If anyone regularly provides personal care or does chores for the person, provide name and contact info		Additional Notes	

Page 2 of 4

Guardianship Face-Fact Sheet

**EMPLOYMENT INFORMATION**

Is individual employed?     YES     NO    \_\_\_\_\_    Title/Work Description \_\_\_\_\_

Employer \_\_\_\_\_    Address \_\_\_\_\_

Phone \_\_\_\_\_    Other Employment Info \_\_\_\_\_

**KNOWN HISTORY OF MENTAL HEALTH ISSUES?**

If yes, describe \_\_\_\_\_

\_\_\_\_\_

**IS INDIVIDUAL FOLLOWED BY AN AGENCY SUCH AS DDS OR DMH?**

If yes, describe \_\_\_\_\_

\_\_\_\_\_

Case Worker \_\_\_\_\_    Address \_\_\_\_\_

Phone \_\_\_\_\_    Email \_\_\_\_\_

Page 4 of 4

Guardianship Face-Fact Sheet

**MEDICAL DIAGNOSES + MEDICATIONS**

Diagnosis 1    Diabetes Type 2    Medication 1 \_\_\_\_\_

Diagnosis 2    Cataracts    Medication 2 \_\_\_\_\_

Diagnosis 3    Gangrene    Medication 3 \_\_\_\_\_

Diagnosis 4    \_\_\_\_\_    Medications 4 \_\_\_\_\_

Medical Diagnosis Notes    Transported by ambulance unconscious, blood pressure 70/45, ketoacetosis, blood sugar 658, gangrenous left foot, cataracts.

**PHARMACY**

Pharmacy Name \_\_\_\_\_    Pharmacy Phone \_\_\_\_\_

Pharmacy Street \_\_\_\_\_    City, ST, Zip \_\_\_\_\_

**MEDICAL CONTACTS**

PCP Name \_\_\_\_\_    PCP Phone \_\_\_\_\_

PCP Street Address \_\_\_\_\_    PCP Email \_\_\_\_\_

PCP City, ST, Zip \_\_\_\_\_    \_\_\_\_\_

Specialist 1 Specialty \_\_\_\_\_

Specialist Name \_\_\_\_\_    Specialist Phone \_\_\_\_\_

Street Address \_\_\_\_\_    Specialist Email \_\_\_\_\_

City, ST, Zip \_\_\_\_\_    \_\_\_\_\_

Specialist 2 Specialty \_\_\_\_\_

Specialist Name \_\_\_\_\_    Specialist Phone \_\_\_\_\_

Street Address \_\_\_\_\_    Specialist Email \_\_\_\_\_

City, ST, Zip \_\_\_\_\_    \_\_\_\_\_

Page 3 of 4

**UNDERSTAND YOUR ORDER or DECREE**

Even when you have seen many orders or decrees, it is worthwhile to be sure you review what the judge has ordered for the specific new client.

This graphic reminds us what guardians of the person are assigned to make decisions about, typically. It shows us what guardians of the estate are assigned to make decisions about, typically. Your state may use the term “guardian” or the term “conservator” differently than is shown. The important message here is to be sure you understand what is expected of you. Expectations include whether the authority is full or limited, and due dates for reporting.

**Do not take for granted that all orders/decrees are the same**

**Find the specific decisions assigned + get clarification, if needed**

**Make copies**

**Mark your calendar**

## Understand Your Order/Decree



**Guardian**

  
housing

  
medical

  
services

  
rep payee

**Conservator**

  
assets

  
income

  
property



**Full or Limited Authority**



**Report Due Dates in your calendar**

Why is your calendar important enough to include as a “tool” or “job aid?”

**BE MEETING READY**

What might a great guardian bring to a first meeting?

Is it okay to drop in at the hospital and meet with Diana at your convenience, or are there people you should schedule time with?

**2-Person-Centered Planning**

---

How well do you understand “person-centered planning?” Which is the best definition?

- A. A documentation and planning process that focuses on an adult’s best interests; considers past decisions and relationships and makes decisions that provide change to improve safety, security and health.
- B. A court-tested program of approaches for decisional-support that includes identifying a person’s areas of challenges; relieving the person of the burden of being involved in upsetting decision-making; instituting changes to keep person safe and happy; minimizes conflict.
- C. Approaches designed to guide change in an adult’s life; carried out in alliance with the person; providing positive control over the life the person desires and finds satisfying; values the person’s current and future contributions to their community and supports respectful relationships.

Why is person-centered planning at the heart of a guardian’s work?


**5 ACTIVITIES SUPPORT PERSON-CENTERED PLANNING**

These 5 activities are not always completed in this specific order. However, it is wise to visit, observe, assess and interview before making urgent decisions.


2

Person-Centered Planning


These 5 activities are not always completed in this specific order. However, it is wise to visit, observe, assess and interview before making urgent decisions.




Visits




Observation



Assessments



Interviews



Urgent Decisions

**VISITS**

2

Person-Centered Planning



Visits

Build Rapport

- Wear business casual clothes.
- Exchange names and make eye contact.
- Find common ground with easy topics such as weather, food and entertainment.
- Use words the person can understand.
- Make meeting more social by bringing pastry or tea, if allowed. Then learn the person's preferences.

Respond to Concerns

- Take the approach that you "meet people where they are." Avoid arguing or trying to change someone until understanding and trust are built.
- "It sounds like you want..."
- "I can see you need me to..."
- "Let me see how I can get that for you."
- "I am on your side and here for you."

Reassure

- Open body language.
- Compassionate words.
- Written handouts that describe guardianship.
- Explain your work and intentions.



Record

- When and where
- People you met
- Observations
- Information you learned
- Action items

Download Contact Notes <https://training.guardianshipcenter.org/catalog/info/id:150>

### Contact Notes

CA TEGORIES	YOUR NOTES
<b>Docket #</b>	<i>Find this on Guardian Decree. You will need it to complete annual Care Plan Report.</i>
<b>Guardian Name</b>	<i>You.</i>
<b>Client Name</b>	<i>Adult with guardian.</i>
<b>Today's Date</b>	<i>Date you are making these notes, Or date range these notes cover.</i>
<b>Name of Contact + Relationship to Client</b>	<i>Family relationship, provider's service, or person's role in the adult's life.</i>
<b>Type of Contact</b>	<i>In person (where)? By phone? Virtually?</i>
<b>Purpose of Contact</b>	<i>Why did you spend time with this person? What were you hoping to accomplish, learn or share?</i>
<b>Time Spent</b>	<i>How much time did you spend?</i>
<b><u>Describe the adult's current physical condition.</u></b>	<i>Make notes any way that is meaningful to you. Keep in mind that these notes will end up being used to complete Section 1 of your first care plan (after 60 days) and then your annual care plan (every year on the date of appointment). Keeping page after page of good notes will help you explain what you have done and how the client has progressed/changed.</i>
<b><u>Describe the adult's current mental condition.</u></b>	<i>Make notes any way that is meaningful to you. Keep in mind that these notes will end up being used to complete Section 1 of your first care plan (after 60 days) and then your annual care plan (every year on the date of appointment). Keeping page after page of good notes will help you explain what you have done and how the client has progressed/changed.</i>



**Contact Notes**

CATEGORIES	YOUR NOTES
<p><b><u>Describe the adult's current social condition.</u></b></p>	<p><i>Make notes any way that is meaningful to you. Keep in mind that these notes will end up being used to complete Section 1 of your first care plan (after 60 days) and then your annual care plan (every year on the date of appointment). Keeping page after page of good notes will help you explain what you have done and how the client has progressed/changed.</i></p>
<p><b><u>Living arrangement + your observations about living arrangement.</u></b></p>	<p><i>Current address of client (how recently has this changed). Notate observations about the living situation so you can describe them to the court or a family member, if asked.</i></p>
<p><b><u>Notes on your visits including conversations with client, observations or conversations with caregivers.</u></b></p>	<p><i>Describe what you talked about so you can refer back to it, if needed.</i></p>
<p><b><u>Decisions or changes client has requested or agreed to.</u></b></p>	<p><i>Sometimes things change. Describe changes if they have occurred or if they are about to happen.</i></p>


**Contact Notes**


CATEGORIES	YOUR NOTES
<p><b>Summary of <u>financial activities</u> during this period.</b></p>	<p><i>Funds must not be commingled between client and any other person, including guardian. If you have financial responsibilities, use this space to describe anything new or noteworthy that you will need to recall for your annual report.</i></p>
<p><b>Notes</b></p>	<p><i>Add anything else you want to remember or refer back to.</i></p>
<p><b>Action Items</b></p>	<p><i>List immediate action items here.</i></p>

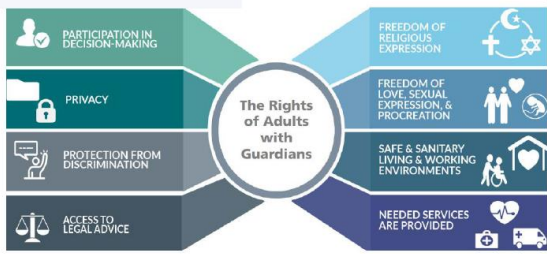
Download Guidelines Card here: <https://training.guardianshipcenter.org/catalog/info/id:267>

## GUARDIANSHIP GUIDELINES WHAT YOU CAN EXPECT FROM YOUR GUARDIAN

- Trusted, respectful listener and advocate
- Questions to understand your preferences + needs
- Actions to protect you from physical or emotional harm
- Advocacy and support to secure services to help you
- Dedication to provide what is important for you, and what is important to you
- Support for your goals and independence, as appropriate
- Several visits in the first 60 days
- Pre-scheduled monthly visits on mutually agreeable days and times
- Available during business hours for unexpected challenges
- Documentation of activities and changes reported to the court







## WHAT YOUR GUARDIAN EXPECTS FROM YOU

*GUARDIAN NAME*

---

*BEST CONTACT PHONE*


---

*BEST CONTACT HOURS*

---

*EMAIL*

- Calm, honest, respectful discussions
- Facts about your current situation, needs, wants, expectations and fears
- Alert to changes that concern or affect you
- Information including contact names, numbers, etc.
- On-time attendance at scheduled meetings
- Willingness to hear professional advice and consider recommendations from medical, social, or housing experts
- Courtesy toward service providers
- Reporting on conflicts or challenges in order to get help
- Participation in selected programs or treatments
- Mail, documents or information received that pertain to guardian's decision-making



Download Bill of Rights Job Aid here: <https://training.guardianshipcenter.org/catalog/info/id:259>



**BILL OF RIGHTS for ADULTS who have a GUARDIAN**

### ACCESS TO JUSTICE

1. You have all rights the court has not granted to your guardian
2. Right to hire lawyer who advocates for outcome you want
3. Right to be present + participate in court hearings
4. Right to tell court your concerns or complaints about your guardianship
5. Right to ask court to review your guardianship for changes
6. Right to evaluation of what you can do + if you should have some or all rights restored
7. Right to the support + accommodations you need to effectively communicate with court and to understand court proceedings
8. Right to have your rights explained to you in your preferred method of communication, and in language you choose



### CORE HUMAN RIGHTS

9. Right to be treated with dignity and respect
10. Right to be free from abuse, neglect, exploitation + discrimination
11. Right to remain as independent as you can
12. Right to express + practice your religion
13. Right to personal privacy
14. Right to humane, safe, sanitary living, learning + work environments
15. Right to sexual expression + to your gender identity
16. Right to competent guardian who advocates for your goals, needs + preferences with respect for your desires, including medical treatment preferences, cultural practices, + religious beliefs



### DECISION-MAKING RIGHTS

17. Right to fully participate in decisions, especially your care, where you live, your activities + social interactions to the extent you wish to be involved + are able to be
18. Right to receive needed services + rehab, within available resources, in least restrictive conditions
19. Right to have your guardian prudently manage your resources
20. Right to fully participate in decisions about how your property is managed, to the extent you wish to be involved and are able to be
21. Right to keep confidential those matters which you wish to keep confidential unless that information is necessary to obtain services, to prevent abuse, neglect or exploitation, or to modify guardianship order





## BILL OF RIGHTS for ADULTS who have a GUARDIAN

### RESTRICTIONS

THE COURT MAY RESTRICT 1 OR MORE OF THESE RIGHTS, BUT ONLY WITH DUE PROCESS.

1. Apply for or maintain a driver's license
2. Be educated
3. Be employed
4. Communicate and interact with others
5. Change your marital status
6. Maintain your reproductive health and procreation
7. Travel
8. Vote



Due process of law means a state applies all legal rules + principles pertaining to the case so all legal rights that are owed to the person are respected.

### GUARDIAN AUTHORITY

THE COURT MAY AUTHORIZE YOUR GUARDIAN TO MAKE DECISIONS FOR THE FOLLOWING ON YOUR BEHALF, BUT ONLY WITH DUE PROCESS.

1. Acquire the benefits, services and supports you need
2. Consent to or refuse your medical and mental health treatment
3. Determine where you live
4. Determine your social environment and social aspects of your personal life
5. File and defend lawsuits
6. Make contracts
7. Make gifts of your money
8. Manage your money and property



### **OBSERVATION + ASSESSMENTS**

We combine these two activities because observation skills are needed to use assessment tools.

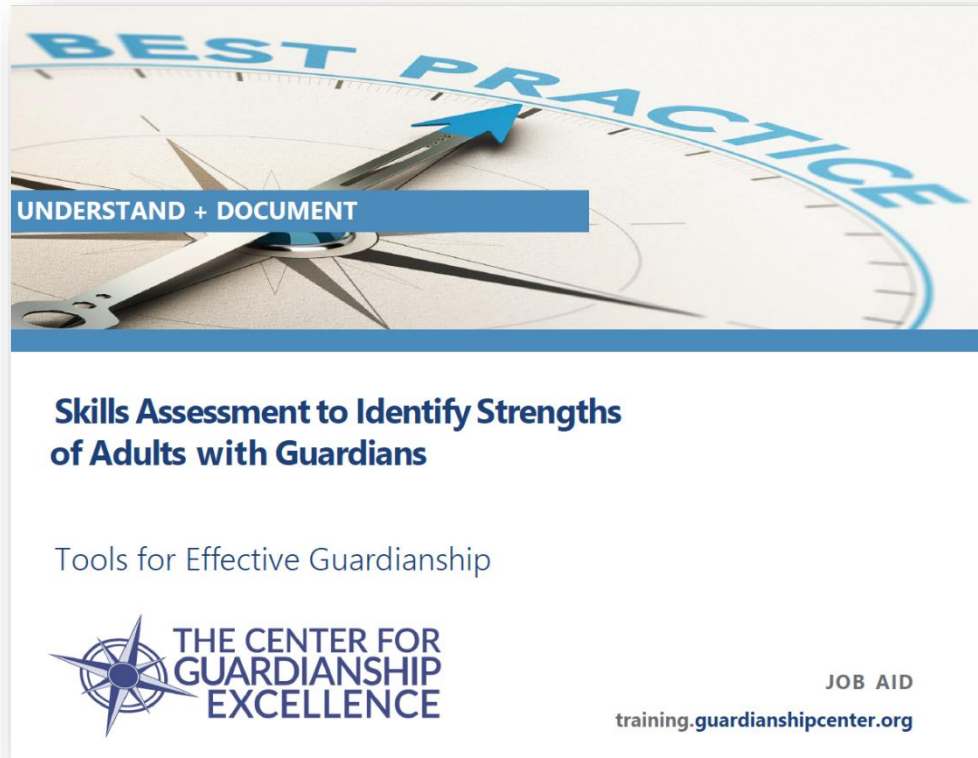
Observation skills involve looking, listening and understanding facts. We can observe what someone is doing (activities, body language) or saying (words and tone). We can observe someone's appearance (clothes, cleanliness, change of hairstyle or piercings, and physical injuries).

Documentation requires facts. Observations are facts. Include verbs of action. Not general descriptions or judgments.

#### **Read each statement. Is it an observation or a judgment?**

1. Diana looked alert when Dee entered the room.
2. Diana moved her hands out from under the blanket and waved.
3. She has no appetite.
4. Diana opened the lid on her breakfast tray only after being prompted, then closed it without eating anything.
5. She is not taking care of herself.
6. I noticed her front left tooth is brown and has a crack in it.
7. Diana is estranged from her family.
8. Tears filled Diana's eyes when she described the mean things she said to her brother.
9. She does not understand what's happening to her.
10. She stated, "I thought I had a black sock on and couldn't get it off."

Download this tool at <https://training.guardianshipcenter.org/catalog/info/id:151>



These 5 categories of adult living skills help guardians observe very specific client activities and gain a picture of what the person can do.

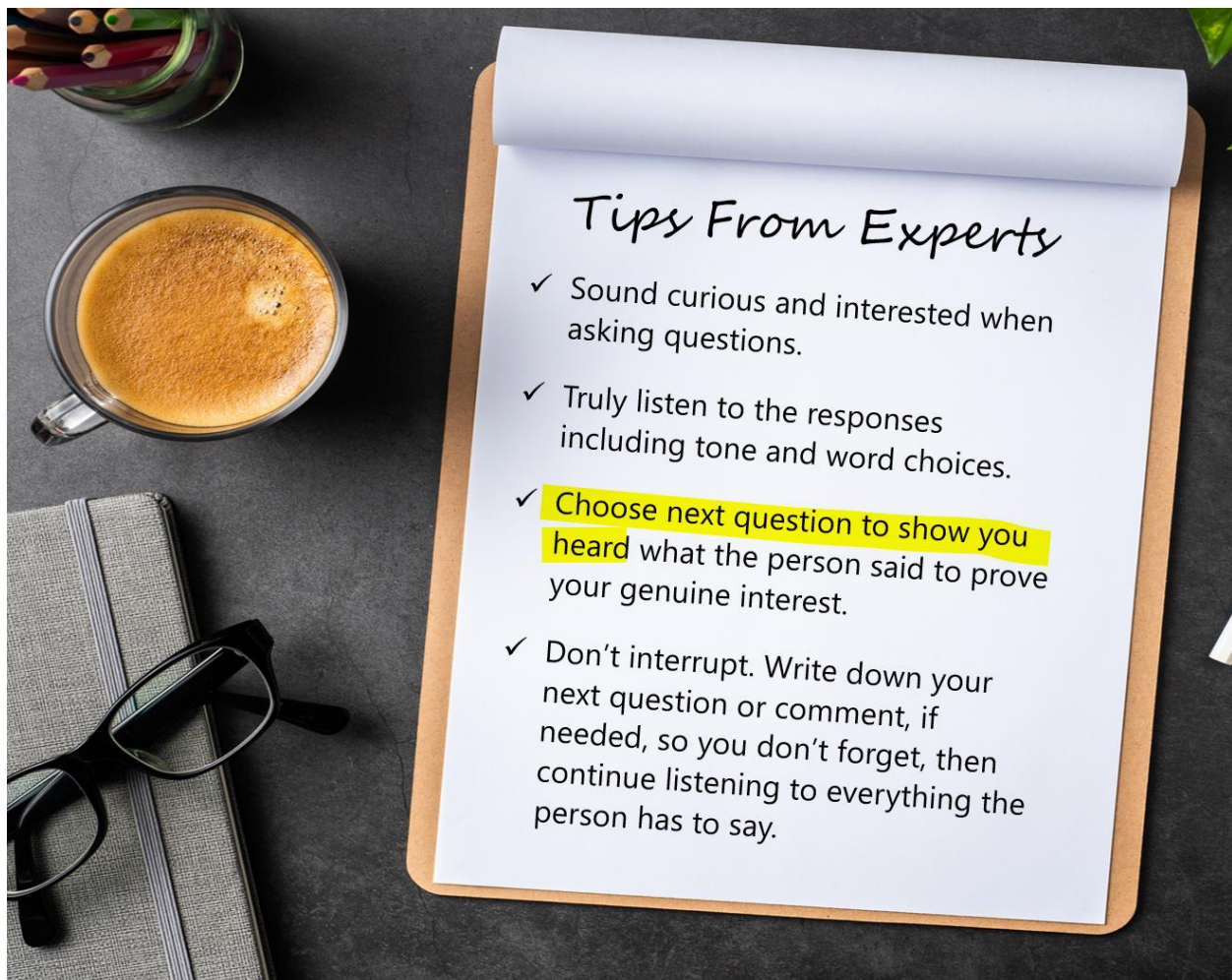
- I. Home, Safety + Comfort Skills
- II. Social + Personal Skills
- III. Healthcare + Medical Decision-Making Skills
- IV. Financial Management Skills
- V. Values, Goals, Preferences, Dreams + Worries

How does a skills assessment help with person-centered planning?

**INTERVIEWS**

Great guardians uncover information from clients + others. Interviews are different than observations and assessments.

INTERVIEWS	OBSERVATIONS + ASSESSMENTS
<ul style="list-style-type: none"> <li>• One-to-one conversations where specific questions are asked so guardian can learn:               <ul style="list-style-type: none"> <li>○ Facts from one person’s viewpoint on various topics</li> <li>○ Opinions and past experiences that clarify one person’s viewpoint</li> <li>○ Stories and anecdotes that enhance your understanding</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Facts seen and heard by the guardian</li> <li>• Client skills compared to commonly used scales of adult capabilities for independent living</li> </ul>





### CONVERSATION STARTER Questions List

*Get to know your client. Create interactive conversations that draw out facts to help you know someone well. Use this list as a starting point for interviewing clients, their loved ones, caregivers, etc.*

1. CURRENT SITUATION + IMMEDIATE PAST HISTORY
  - What can you tell me about the the situation that brought you here? [What happened to NAME?]
  - Have you been struggling with this for a while? [How long has NAME been struggling with this?]
2. HEALTH
  - How are you feeling? [Have you noticed changes in NAME's health? What? When?]
  - Are you better today?
3. FOOD/APPETITE
  - How is the food? [What can you tell me about NAME's appetite or eating habits?]
  - Are you hungry?
  - What are your favorite foods?
4. PETS
  - Do you have pets, do they need attention right now? [Does NAME have any pets that need to be taken care of right now?]
5. HOME LIFE
  - How do you like where you live? [Does NAME say anything about wanting to move or feeling dissatisfied about where she/he/they lives?]
  - Is there someone you want to live near?
6. UNMET NEEDS
  - What do you need? Is there anything I can bring you? [What do you think NAME needs?]
7. ACTIVITIES + FREEDOM
  - What do you like to do with your time? [What do you and NAME do together? Can you tell me about activities she/he/they enjoys?]
8. IMPORTANT PEOPLE
  - Who are the most important people in your life? [Who are the most important people in NAME's life?]
  - Anyone you need me to contact?
  - Who can help me get to know you better?
  - Who do you trust to talk with me?
  - Anyone you don't want me to talk to?
9. EMERGENCY SITUATIONS
  - I see you have [name] listed as your emergency contact. Is it okay if I contact [name]?
  - Who else might you want to know about what's happening with you?
10. PLANS FOR AGING + DEATH
  - Have you made any arrangements for the future such as a living will or plans for burial? [Have you and NAME discussed plans for aging such as a living will or funeral?]
  - Would you like to tell me about how you feel about long-term care if you get very sick? What you will or will not want to have happen to you?
11. SAFETY
  - Do you feel safe where you are now? [How safe is NAME where she/he/they lives now? Does she/he/they have guns or are there people around her/him/them with weapons?]
  - Do you feel safe at home?
  - Anyone or anyplace you want to avoid?
  - Do you own any weapons?

Visits typically help to uncover urgent actions.



What urgent issues or actions have been uncovered for Diana Dawes?

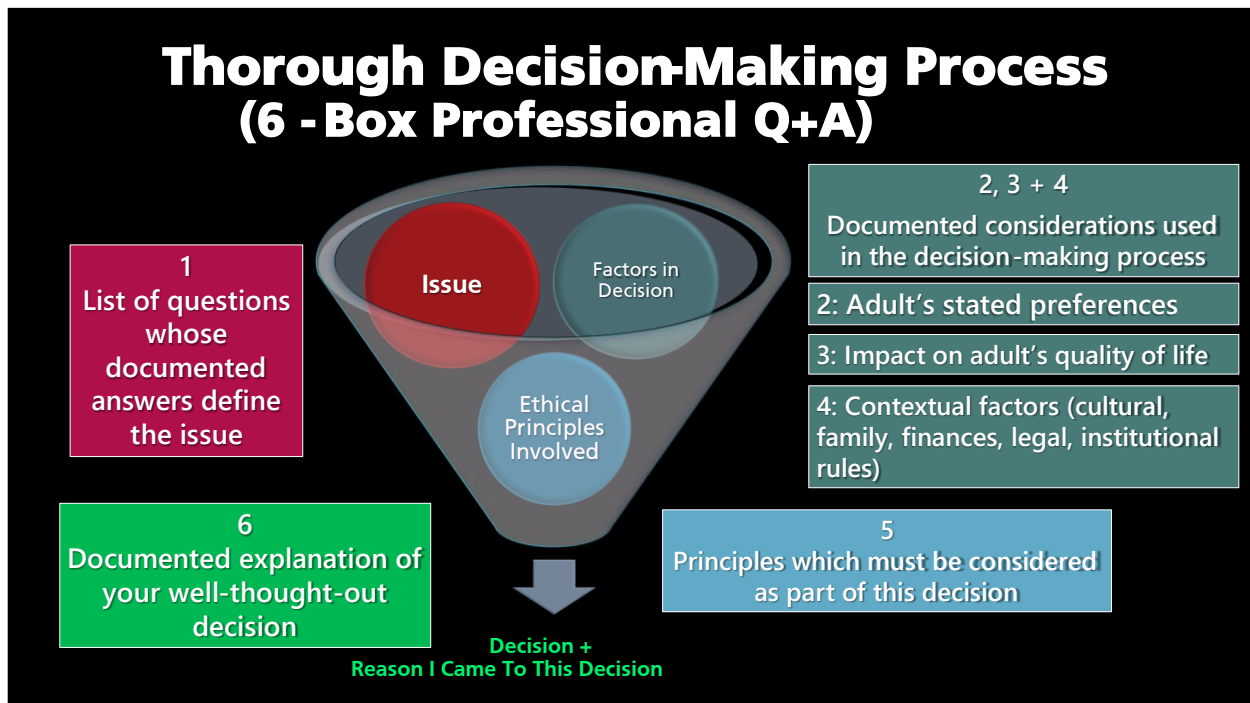
### 3-Making Urgent Decisions

#### DEFINITION

In guardianship, urgent decisions can be defined as topics to take action first or immediately.

In business, urgent decisions can be defined as actions taken ~~without the usual due diligence or process.~~

For guardians, even though speed is necessary, thorough decision-making is required.



You may download this tool as an Excel Spreadsheet and use it for your guardianship work. Find it here:

<https://training.guardianshipcenter.org/catalog/info/id:260>

**DIANA’S DIABETIC NEUROPATHY** (is a name you might choose for this file)

Use this space for notes on this case:

Section 5 of the “6-Box Professional Q+A” reminds guardians to refer to the “Standards of Practice” or published by NGA. Our version capsulizes the standards into an easy-to-use job aid we call “Ethical Principles.”

Which of the 21 “ethical principles” apply to this decision we are discussing?

Download this job aid at <https://training.guardianshipcenter.org/catalog/info/id:208>

Client Advocacy	Medical	Business + Financial
<ol style="list-style-type: none"> <li>1. Preserve individual’s dignity</li> <li>2. Create safe, secure environment</li> <li>3. Understand needs, values + goals</li> <li>4. Support growth + achievement of goals</li> <li>5. Select least restrictive alternatives</li> <li>6. Maximize independence</li> <li>7. Seek termination or limitation of guardianship, if capacity regained</li> </ol>	<ol style="list-style-type: none"> <li>8. Beneficence</li> <li>9. Non-Malevolence</li> <li>10. Best Interest</li> <li>11. Substituted judgment</li> <li>12. Informed consent</li> <li>13. Justice</li> </ol>	<ol style="list-style-type: none"> <li>14. Detailed accounting</li> <li>15. No commingling of funds</li> <li>16. No financial benefit to conservator</li> <li>17. No estate planning nor asset sales without court approval</li> </ol>
<div style="border: 1px solid white; padding: 5px; background-color: #4a7ebb; color: white; text-align: center;"> <p><b>All 3 Categories</b></p> <ol style="list-style-type: none"> <li>18. Comply with laws + court orders</li> <li>19. Involve individual in decisions</li> <li>20. Strict confidentiality</li> <li>21. Documented support for every decision</li> </ol> </div>		



**THE CENTER FOR  
GUARDIANSHIP  
EXCELLENCE**

# Ethical Principles



**CLIENT CASES ARE VERY DIFFERENT FROM ONE ANOTHER. TOOLS & PROCEDURES CAN BE THE SAME.**

## Guardians are DecisionMakers

*For adults who need decisional-support urgently or long-term*



**Ben Ballesta**  
39 years old

Referred by Attorney  
after arrest, rehab, relapse,  
diagnosed with schizophrenia,  
about to be released



**Candida Charles**  
31 years old

Referred by DDS  
after sudden death of  
her aunt/guardian,  
difficulties with speech,  
walking, memory, lives in  
group home since age 20

Each client deserves immediate and thorough attention in the first 60 days.

The guardian's skills and tools allow for consistency and habits to be formed even though the cases are dramatically different.

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### Final Review

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1. The first 60 days is rarely a casual “get to know you” period. Courts expect Guardians to take control and help the person immediately.
2. Explanatory “leave behinds” can help someone get comfortable with your good intentions, availability, and the facts about guardianship.
3. Assess a client’s capabilities rather than focus on challenges or incapacities. Find the coachable skills and the right people to do the coaching to bring positive change to someone’s life.
4. Interview everyone but make it conversational.
5. Document every conversation/contact to help you with accurate reporting.
6. Person-centered planning requires visits, observation, assessment, interviews and the making of urgent decisions. This can mean a dozen contact records (or more) are completed during early weeks.
7. Urgent decisions must involve thorough decision-making procedures. The “6-Box Professional Q+A” tool can help you make decisions then explain them to others, if needed.
8. If written tools (that we offer at no charge) are not for you, look for software and apps that get and keep you organized.