

# **DUTY STATEMENT**

**LGA Name:** ABC County

**Name of Claiming Unit:** Public Guardian

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## **Deputy Public Guardian**

### **DEFINITION:**

Under general direction and supervision, this flexibly staffed class investigates the medical, psychological, financial and social backgrounds of individuals referred to for conservatorship to determine and recommend to the court regarding appropriateness of conservatorship. Plans and monitors the personal and financial affairs of such persons; arranges for delivery of community support services for elderly, mentally impaired or physically disabled clients; assesses risk and provides case management for conservatives to assure their safety in the least restrictive environment; and performs other duties as assigned.

### **EXAMPLE OF DUTIES:**

- Analyzes compiled information to determine whether the person is disabled, or substantially unable to provide for their own personal care, shelter and financial needs; investigates and assesses the financial, medical, psychological, vocational and social background of persons placed under the jurisdiction of the Public Guardian.
- Explains conservatorship to proposed conservatives and wards, their families, and other involved persons or agencies, including legal representatives, physicians, health care providers and mental health professionals.
- Develops comprehensive care plans for the conservatives to address the conservatives' assessed needs and level of functioning, reviewing such plans on an on-going basis and modifying as appropriate.
- Petitions for appointment, annual reappointment and termination of Lanterman-Petris-Short (LPS) conservatorships and Probate Code Petitions based on declarations of mental health and/or other medical professionals, accepted by the court/law; causes preparation of and reviews court pleadings, inventory and appraisals, periodic and final accountings, court confirmation of sales, and petitions for special instructions; interprets and applies the Welfare and Institution and Probate Codes.
- Determines whether guardianship or conservatorship is appropriate under the applicable laws or any suitable alternatives. Prepares reports, testifies and makes recommendations to the court regarding guardianship or conservatorship referrals.
- Researches records for pertinent clinical history, diagnosis and prognosis; consults with physicians, community social services or health care services to arrange for placement of conservatives in the most appropriate and least restrictive facility; authorizes treatment and personally coordinates the placement of conservatives in care facilities; coordinates and/or visits these facilities in person, telephone, and/or video conferencing to monitor the conservatives and their current needs, to evaluate their ongoing suitability as a residence for conservatives; and arranges for transportation to court hearings when required.
- Serves as clients' rights advocate; works with community health, social services and other agencies to arrange for a delivery of services to clients; applies for all public and private financial benefits and assistance to which conservatives are eligible, such as Social Security, Veteran's and retirement benefits or social services program assistance.
- Locates, inventories and directs the marshalling of all assets, including Social Security benefits, Veterans' benefits, other income, and personal and real property; oversees appraisal of estate, including maintaining records of assets and debts for the estate; and protects the estate against loss and/or waste; collects debts due to conservatives; reviews claims against conservatives' assets; arranges for the storing of personal property and assists in disposing of real and personal property through sale, public auction or disbursement to relatives, as appropriate and provides for payment of expenses from assets and other sources of assistance.
- Collaborates with Adult Protective Services, the local law enforcement, etc. in preparing and invoking a Certificate of Authority to Take Possession or Control of Property (Probate Code Section 2900-2903) for the purpose of protecting the assets of an elder or dependent adult domiciled in ABC County from loss, injury, waste, or misappropriation by another party.
- Analyzes and makes recommendations to management concerning procedural changes such as new or revised work-related policies, procedures, and standards; serves on policy, technical, personnel, and customer group committees.

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- Prepares and maintains comprehensive, accurate and timely case reports, records, and correspondence, including petitions, court reports and chronological activity records.
- Complies with all County equipment and safety policies and procedures, and California Occupational Safety and Health Administration (CalOSHA) rules and regulations.
- Drives a County or personal motor vehicle to attend court sessions and meetings, interview people and visit case sites; may be designated to represent the County as the Public Guardian in meetings with other county or community agencies where assigned program is at issue.
- Applies for and acts as Representative Payee for conservatives.
- Consults with County Counsel to interpret sections of State and Federal regulations, Welfare and Institution and Probate Codes pertaining to Public Guardian program matters.
- Assists counsel of record on behalf of wards and conservatives in all criminal and civil hearings outside of conservatorship or guardianship.
- Notifies relatives of the death of conservatives, makes funeral arrangements and arranges for disposal of assets of deceased wards and conservatives as directed by the Probate Code.
- Develop policies and procedures in the areas of Guardianship, Conservatorship, LPS, and Estate Administration and revise as necessary with changes in local and State laws and regulations.
- Performs other duties as required.
- Outreach to the community by providing Medi-Cal information and services to Medi-Cal participants or potential Medi-Cal participants. **(Code 04)**
- Referral, Coordination, and Monitoring of Medi-Cal Services includes making referrals for, coordinating, and/or monitoring the delivery of Medi-Cal covered services. **(Code 06)**
- Facilitate the Medi-Cal application by explaining the process, assisting in completing the application, gathering information for the application, packaging all forms for the Medi-Cal eligibility determination. **(Code 08)**
- Program Planning and Policy Development for Medi-Cal Services for Medi-Cal Clients includes time spent developing strategies to increase Medi-Cal system capacity and close Medi-Cal service gaps. **(Code 15)**
- Program Planning and Policy Development for Medi-Cal Services for Medi-Cal and Non Medi-Cal Clients includes time spent developing strategies to increase Medi-Cal system capacity and close Medi-Cal service gaps. **(Code 17)**
- MAA/TCM Implementation Training includes time spent providing or attending training related to the performance of MAA or TCM. **(Code 20)**

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Employee Signature

Employee Name

Date