

## Guardianship and Conservatorship Program Regulations

### 201 Regulation Definitions

As used in these regulations, the following definitions shall apply:

201.1 "Certified Professional Guardian and Conservator" (Guardian and Conservator, or CPGC) shall mean any person admitted to practice as a Guardian and Conservator under Washington Supreme Court Rule GR 23.

201.2 An "approved education activity" shall mean an individual seminar, course, or other continuing education activity approved by the Continuing Education Committee of the Certified Professional Guardianship and Conservatorship Board ("Board" hereinafter).

201.3 A "credit hour" equals one clock hour of actual attendance.

201.4 The "Committee" shall mean the Continuing Education Committee of the Board.

201.5 The "staff" shall mean the staff of the Administrative Office of the Courts (AOC).

201.6 "GR 23" shall mean General Rule 23, which is the Supreme Court Rule adopted for certifying Professional Guardian and Conservators, together with any subsequent amendments thereto, as adopted by the Supreme Court of the state of Washington.

201.7 "Teaching" in an approved continuing education activity shall mean and encompass the preparation and/or delivery of a prepared talk, lecture, or address at such activity.

201.8 "Participating" in an approved continuing education activity shall mean and encompass: 1) acting as a planning and organizing chair of such activity, or 2) taking part in such activity as a member of a panel discussion, without the preparation of written materials or the delivery of a prepared talk, lecture, or address.

201.9 "Reporting period" shall mean a two-year period from January 1 to December 31 the following year.

201.10 To qualify for "ethics credit," a course or subject must deal with the ethical issues and ethical conflicts relative to the legal rights, duties, or responsibilities of Guardian and Conservators or must include discussion, analysis, interpretation, or application of the Standards of Practice, judicial decisions interpreting the Standards of Practice or guardianship and conservatorship ethics, and /or ethics opinion published by the CPGC Board.

201.11 To qualify for "general credit", a course or subject must encompass training and information pertaining to the business side of a Guardian and Conservator's practice, the personal care of Guardian clients, and/or the management of assets, estates and benefits. Topics qualifying for general credit include, but are not limited to the following:

the use of forms to assist in the practice, tax and civil liability, insurance and bond issues, relationship with counsel and other professionals, fee issues and billing practices, business development, information pertaining to personal and physical care, residential placement, medical/psychological/social/family matters, marshalling/management/sale of/maintenance of assets, entitlement to state/federal benefits, estate planning, and other issues and activities with which a Guardian and Conservator should be familiar. It also includes matters that apply generally to guardianship and conservatorship such as the roles of guardian ad litem and court visitors, petitions for direction, general civil procedure or the role of the court.

201.12 To qualify for "emerging issues credit," a course or subject must encompass training and information pertaining to a topic specifically identified by the Board. The Board will determine for each reporting period which emerging issue(s) should be addressed in guardianship and conservatorship education. Emerging issues shall be identified by the Board at least five months prior to the topic's corresponding reporting period. A CEU Sponsor may choose to include with their CEU application a written request that the Board approve a topic outside of the preapproved Emerging Issues categories as Emerging Issues credit. The request must provide explanation as to how the topic is of important significance to the guardianship and conservatorship profession and that the topic or issue has arisen during the current reporting period. AOC Staff have discretion to approve or deny a request for a topic to be approved as an Emerging Issues credit. Any approval or denial of a topic as Emerging Issues must be ratified by the Education Committee. A credit that is denied as an Emerging Issue may be approved as a General credit)