

2023 Instructions for Sponsors of Guardian/Conservator Continuing Education

Course Submission Requirements

1. The Application for Approval of Continuing Education Activity and resumes or bios of instructors should be submitted electronically to guardianshipprogram@courts.wa.gov.
2. If a complete application is received more than thirty (30) days prior to the seminar, the fee is \$25 per occurrence. If the application is received less than thirty (30) days prior to the event, the fee is \$50 per occurrence. Approval will not be granted if the application for approval is received by the Board more than thirty days after the course has been held. *All fees are non-refundable and non-transferable.*
3. Checks should be made out to the Administrative Office of the Courts (AOC) and mailed along with the completed Continuing Education Course Approval Request Invoice to:

Samar Malik
Administrative Office of the Courts
PO Box 41170
Olympia, WA 98504-1172

4. All courses must be open to all Certified Professional Guardians and Conservators (CPGCs). The sponsoring agency will allow the Certified Professional Guardianship & Conservatorship Board (Board), a member thereof, or a designee of the Board, to audit the program.

Guardian/Conservator Continuing Education Course Content Requirements

According to Continuing Education Regulation 200, CPGCs are required to participate in ongoing education to maintain their certification. The training requirement is a minimum of 24 credit hours per the two (2) year reporting period, with the minimum time allocated among education and skills training in three (3) continuing education categories: General, Ethics and Emerging Issues. A "credit hour" equals one (1) clock hour (60 minutes) of actual attendance.

- **General**

To qualify for "General credit," a course or subject must encompass training and information pertaining to the business side of a Guardian/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 & Conservator should be familiar. It also includes matters that apply generally to guardianships and conservatorships such as the roles of Court Visitors, petitions for direction, general civil procedure, or the role of the court.

- **Ethics**

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/Conservator or must include discussion, analysis, interpretation, or application of the Standards of Practice, judicial decisions interpreting the Standards of Practice or guardianship ethics, and/or ethics opinion published by the Board.

- **Emerging Issues**

The Board selected The Uniform Guardianship Act (UGA), Covid-19, Mental Health, and Sexual Identity and Gender for the emerging issues topics for 2023 – 2024

To qualify for “Emerging Issues credit,” a course or subject must encompass training and information pertaining to a topic specifically identified by the Board. A CEU application sponsor may request Emerging Issues credit for a proposed course that does not fall under on the Board’s pre-approved Emerging Issues categories provided below if the sponsor includes a short explanation that establishes that the proposed course:

- (1) Concerns an issue of substantial importance to the guardianship/conservatorship profession; and
- (2) The issues discussed have arisen during the two years prior to date of the proposed course.

All courses shall:

- (a) Have significant intellectual or practical content and its primary objective shall be to increase the attendee's professional competence as a CPGC.
- (b) Constitute an organized program of learning, dealing with matters directly relating to the guardianship/conservatorship practice and/or to the professional responsibility or ethical obligations of a CPGC.
- (c) Be taught by faculty members qualified by practical or academic experience to teach a specific subject.
- (d) Utilize high quality, readable, and carefully prepared written materials for distribution to all attendees at/or before the time the course is presented. It is recognized that written materials are not suitable or readily available for some types of subjects. The absence of written materials for distribution should, however, be the exception and not the rule. Providing students the materials electronically is encouraged.
- (e) Be conducted in a setting physically suitable to the educational activity of the program. A suitable writing surface should be provided where feasible.
- (f) Be open to all CPGCs.

Post Course Requirements

Course Evaluation

The sponsor shall obtain course evaluations from participants and submit them within thirty (30) days after the class.

The Board may evaluate the performance of any continuing education instructor, course, or sponsor through observation, review of qualifications, or adherence to Board continuing education requirements.

Reporting Attendance

The sponsor of a continuing education course shall monitor the attendance of each approved course and maintain an attendance log which lists the name and certification number of every CPGC who attends a course.

The program sponsor shall submit the attendance log to the Board within thirty (30) days after completion of the course. The log shall serve as proof that the CPGCs listed completed the sponsor’s course. Attendance logs should reflect the actual arrival and departure time.

Sponsors will provide each attendee with a copy of the CEU Attestation Form at the continuing education course. If a guardian/conservator does not attend the full course, they are still responsible for completing this form. The sponsor will send all forms to the AOC within thirty (30) days after completion of the class.

CERTIFIED PROFESSIONAL GUARDIANSHIP AND CONSERVATORSHIP BOARD APPLICATION FOR APPROVAL OF CONTINUING EDUCATION ACTIVITY

Please type or print legibly

1. Sponsor Name:
- Sponsor Address:
- Sponsor Phone:
- Sponsor Email:
- Contact Person of Sponsor:

For Board Office Use Only

General Credits _____

Ethics Credits _____

Emerging Issues Credits _____

Approved ____ Yes ____ No

Initials _____

2. Title of Educational Activity:

3. Date, time (start and end) and exact location (address including building or room) of presentation:

| Start Date/Start Time | End Date/End Time | Location (Address, Building, Room) |
|-----------------------|-------------------|------------------------------------|
| | | |

Is this class a webinar? Yes No Is this webinar interactive? Yes No

Note: The sponsor is responsible for informing attendees that group viewing of the class is not acceptable. Each individual attendee must log in separately, as sponsor login records are used to verify attendance.

4. Number of continuing education credit hours requested:
 - General:
 - Ethics:
 - Emerging Issues: _____
 - Uniform Guardianship Act:
 - Covid-19:
 - Mental Health:
 - Sexual Identity & Gender:

(See CPG Continuing Education Regulation 201)

5. Have you requested approval of this course before? Yes No
If yes, when
6. Registration fee for activity:
7. Faculty: Attach a document containing all the information below for all faculty members.
- Name
 - Resume/Bio/Credentials (Include professional and educational background, teaching experience
 - Topic they're teaching
8. Complete description of all materials to be distributed to participants.
9. Description of physical facilities (e.g., classroom or theater seating, availability of writing surface, etc.):
10. Method of evaluation of program (e.g., participant critique, independent evaluator, etc.):
11. Please complete "Outline of Course Presentation" on Page 8 with a description of each session.
12. Estimated number of attendees:

Sponsor agrees: (1) to allow the Certified Professional Guardianship & Conservatorship Board, a member thereof, or such other person as it shall designate, to audit the program in question; and (2) within **thirty (30) days** following the activity send to AOC a list of all CPGCs who attended the activity, any Attestation Forms received, and all evaluations. **Attendance logs should reflect the actual arrival and departure time.**

NOTE: On the date of the continuing education activity, the sponsor must provide a copy of the CPGC course approval form to each CPGC in attendance.

**Return this form along with \$25 if filed more than thirty (30) days prior to the activity.
If filed less than thirty (30) days before the activity, return the form with \$50.
Return the form to:**

**Certified Professional Guardianship & Conservatorship Board
Administrative Office of the Courts
Attn: Samar Malik
PO Box 41170
Olympia, WA 98504-1170**

Outline of Course Presentation

(Rows one and two are examples)

| Start and End Times (Each Segment) | Subject Title and Description | Content (Must indicate type of credit per segment, General, Ethics or Emerging Issues; Ethics must include the SOPs that will be discussed) | Total Time Spent on Subject (Each Segment) | Faculty Name |
|--|--------------------------------------|---|--|---------------------|
| 7:30A – 8:30A | Developing a Care Plan | General | 1 hour | Jane Doe |
| 8:30A – 9:30A | Conflicts of Interest | Ethics | 1 hour, SOP 406 | John Doe |
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Certified Professional Guardianship & Conservatorship Board Continuing Education Course Approval Request Invoice

Contact Information of Provider of Continuing Education:

Name:

Address:

Phone:

Course Title:

Date of Course:

Check the appropriate box below:

\$25 Enclosed (If received thirty (30) days before the date of the training).

\$50 Enclosed (If received less than thirty (30) days before the date of training).

Please return this form with check made out to the "Administrative Office of the Courts" to:

**Certified Professional Guardianship & Conservatorship Board
Administrative Office of the Courts
Attn: Samar Malik
PO Box 41170
Olympia, WA 98504-1170**

Please direct questions to:

Samar Malik
(360) 705-5308
Samar.Malik@courts.wa.gov

FOR INTERNAL USE ONLY

Provide Date Received, Check Number and Amount