
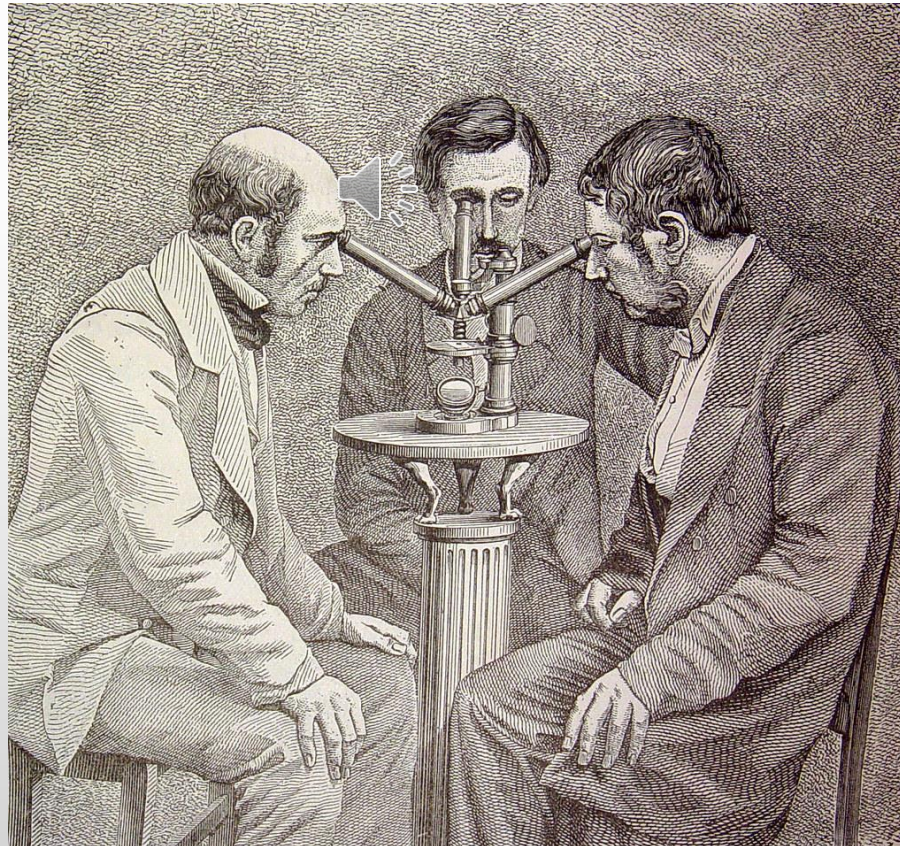


CONTINUING  
EDUCATION  
REQUIREMENTS   
FOR  
CPGCs

December  
2022

# PROFESSIONAL CONTINUING EDUCATION



## General Rule 23

*Continuing Education.  
The Board may adopt  
and implement  
regulations for  
continuing education.*

# CONTINUING EDUCATION REGULATIONS

CPGC Board Regulations – Series 200



[Regulations 200 Series](#)

Credits required and timelines for reporting, etc.

Refer to Regulations for full details





# CONTINUING EDUCATION REGULATIONS

## Credits

- ❖ 24 credits from Education Committee approved courses required over two year period
- ❖ Credits in three (3) categories - General, Ethics and Emerging Issues



# CREDITS BY CATEGORY

- **24** Total Credits Minimum Requirement over the two year reporting period
- Of 24, **4** must be Ethics Credits
- Of 24, **4** must be Emerging Issues Credit

## Newly Licensed CPGCs – Different Requirements

- ❖ CPGCs admitted in the first year of the two year reporting period – must earn **12 credits** for the reporting period.
- ❖ CPGCs admitted in the second year of the two year reporting period – are **exempt** for that reporting period.

See Regulation 213



# GENERAL CREDITS

## Information re:

- ✓ Business side of practice
- ✓ Personal care of clients
- ✓ Management of assets, estates and benefits

## Examples include:

- ✓ Use of forms to assist in the practice
- ✓ Tax and civil liability
- ✓ Insurance and bond issues



# GENERAL CREDITS

## Examples continued:

- ✓ Relationship with counsel and other professionals,
- ✓ Fee issues and billing practices
- ✓ Business development
- ✓ Information pertaining to personal and physical care
- ✓ Residential placement,
- ✓ Medical/psychological information
- ✓ Social/ family matters,





# GENERAL CREDITS

## Examples continued:

- ✓ 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

# GENERAL CREDITS

Also may qualify:



Matters that apply generally to guardianship and conservatorship such as:

- ✓ Roles of court visitors or guardian ad litem,
- ✓ Petitions for direction
- ✓ General civil procedure
- ✓ Role of the court



# ETHICS CREDITS

Address ethical issues and ethical conflicts relative to the legal rights, duties, or responsibilities of Guardian and Conservators

OR

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.

# EMERGING ISSUES CREDITS

New  
topics  
to  
learn  
and  
think  
about





# EMERGING ISSUES CREDITS

**Emerging Issues Credits for January 1, 2021 –  
December 31, 2022 Reporting Period:**

 Cultural Diversity

Effective Communication

Right of Association

**\*\*Sponsor may request approval of a topic outside of the  
identified topics**

# EMERGING ISSUES CREDITS

Emerging Issues Credits for January 1, 2023 – December 31, 2024  
Reporting Period:

Uniform Guardianship, Conservatorship and Other Protective Arrangements Act (UGA)

Mental Health

Sexuality and Gender

COVID-19

\*\*Sponsor may request approval of a topic outside of the identified topics

# REPORTING PERIODS

✓ Two year reporting period cycle: January 1 – December 31 the following year



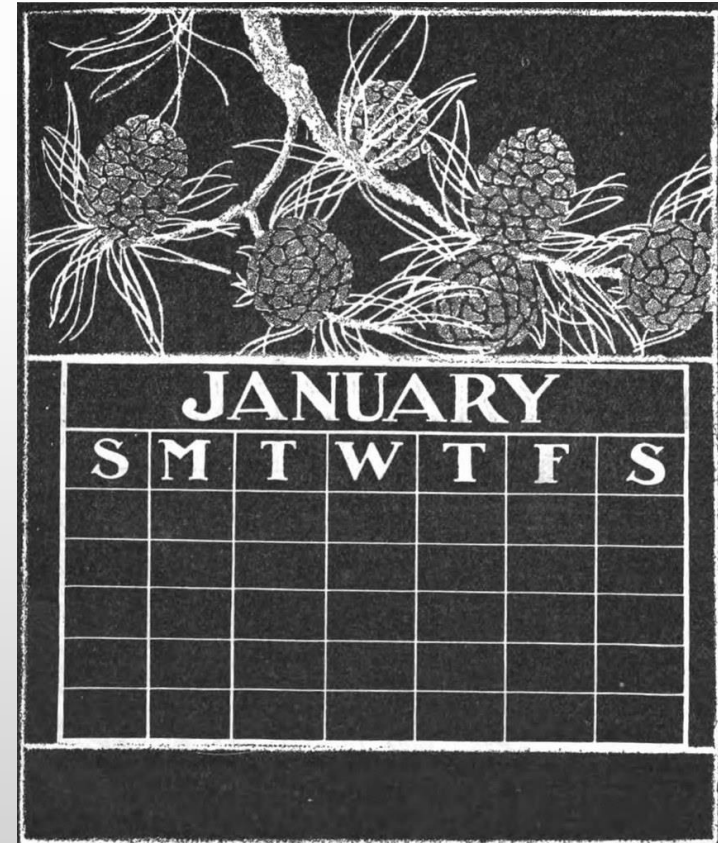
✓ **Current reporting period** –  
January 1, 2021-December 31, 2022

✓ **Next reporting period** – January  
1, 2023 – December 31, 2024

# REPORTING DEADLINE

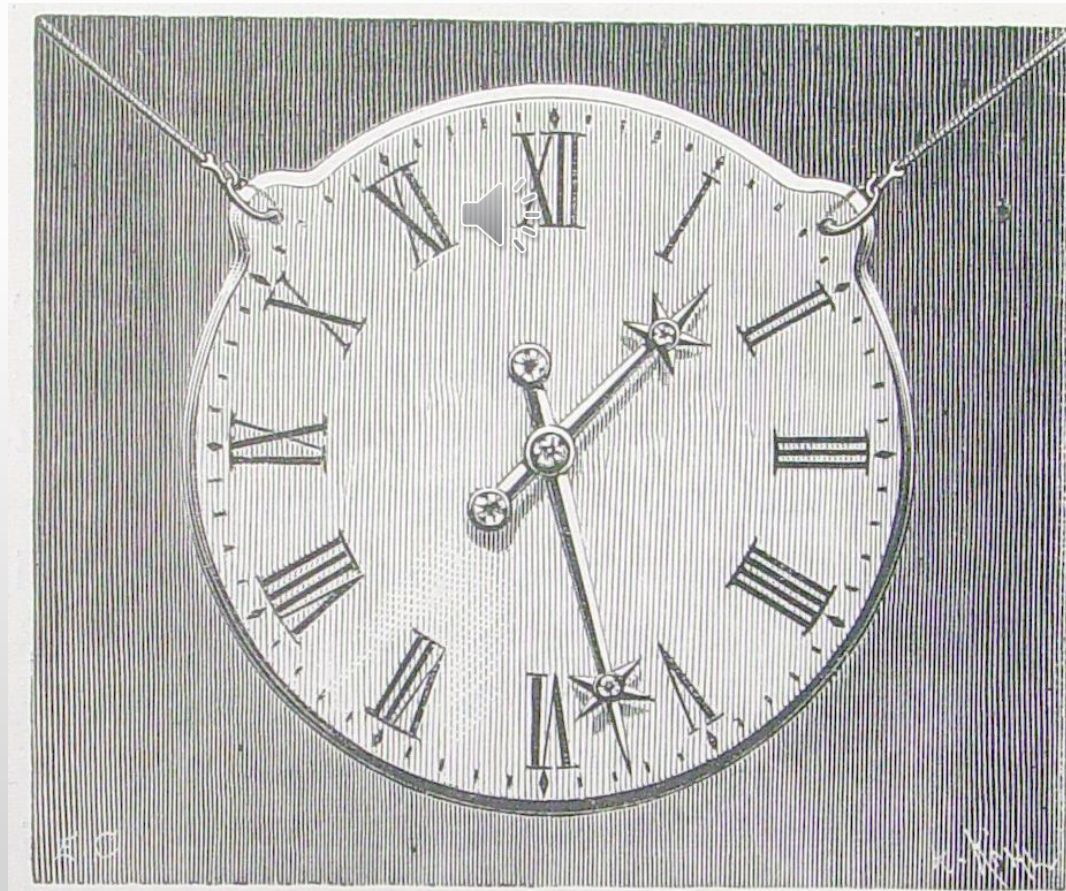
**January**   
**31<sup>st</sup>**

following the  
close of the  
two year  
reporting  
period





# DEADLINE FOR EARNING CREDITS



Current  
Reporting  
Period  
-  
**December  
31st 2022!**

# APPROVED COURSES LIST

✓ On-line options


✓ Direct Link:

<https://www.courts.wa.gov/content/publicUpload/cpg/approvedcontinuingeducationclasses.pdf>

✓ Guardian Portal location:



# DEADLINE FOR REPORTING CREDITS AND COMPLETING AFFIDAVIT

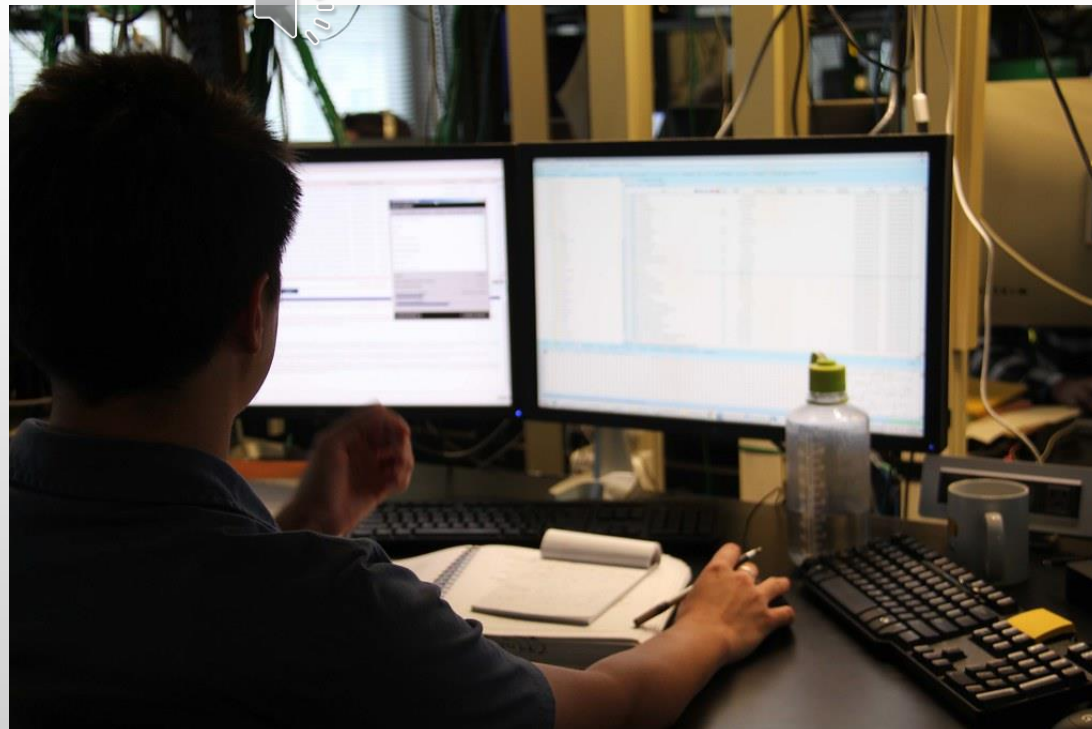
Report Credits and  
Complete Affidavit by:  
 January 31, 2023!





# AFFIDAVIT FOR COMPLETING CREDITS

Affidavit can be completed  
on-line.....





# ONLINE AFFIDAVIT

#1

**CPGC Program**



Home

About Guardianship



Application & Account Maintenance



Rules, Regulations & Standards

Ethics Advisory Opinions

Disciplinary Proceedings



Continuing Education Classes



#2

Application & Account Maintenance



Start Individual Application

Start Agency Application

Continue an Application

Recertify

Continuing Education Units

Rules, Regulations & Standards

Ethics Advisory Opinions


# ONLINE STEPS

Log in with license # and password



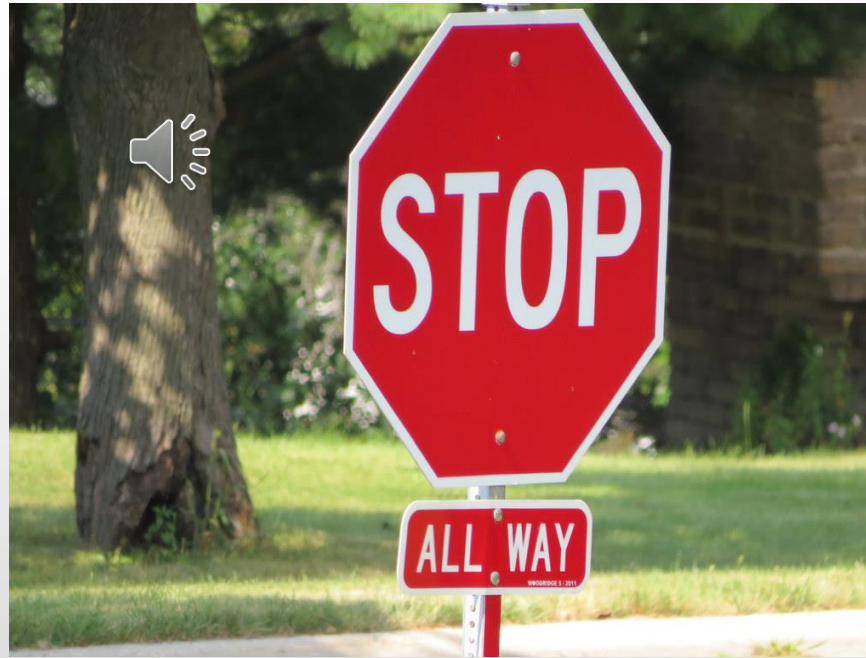
Password assistance needed? Contact:  
Samar Malik at # 360-705-5308 or  
[Samar.Malik@courts.wa.gov](mailto:Samar.Malik@courts.wa.gov)

# ONLINE STEPS

- Verify that all credits earned have been entered 
- If all credits earned are recorded, **complete certification affidavit online**

# ONLINE STEPS

If all your credits are not reflected..



Contact: Samar Malik at: # 360-705-5308 or [Samar.Malik@courts.wa.gov](mailto:Samar.Malik@courts.wa.gov) to correct first!



# AFFIDAVIT FOR COMPLETING CREDITS

<b>CPGC Program</b>	▲
Home	
About Guardianship	▼
Application & Account Maintenance	▼
Rules, Regulations & Standards	
Ethics Advisory Opinions	
Disciplinary Proceedings	▼
Continuing Education Classes	↗
<b>Guardianship Forms</b>	

## **Continuing Education Reporting Forms**

- [Affidavit Reporting Continuing Education Credits](#)

# IF NOT COMPLETING AFFIDAVIT ONLINE

- Complete paper affidavit form
- Email completed affidavit by January 31 to [Samar.Malik@courts.wa.gov](mailto:Samar.Malik@courts.wa.gov)
- Mail (post-marked by January 31) to the AOC at the following address:

**Administrative Office of the Courts C/O Samar Malik**

**PO Box 41170**

**Olympia, WA 98504-1170**

# TEACHING CREDITS

❑ Regulation 201.7 permits credits for teaching

❑ Teaching Time/Preparation Time –  
computed separately

❑ Computation of these credits are detailed in the Regulations

❑ Regulation 203.5.1- computation rules

# PARTICIPATION CREDITS

- ❖ Participation credits are different than credits earned by attending a course
- ❖ Participation credits are only earned by either: (i) **acting as a planning and organizing chair of an approved educational activity**, or (ii) **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.**



# PARTICIPATION CREDITS

☐ Regulation 201.8 permits credits for participating



☐ Participation Time/Preparation Time – computed separately

☐ Computation of these credits are detailed in the Regulations

☐ Regulation 203.5.2- computation rules

# CARRYOVER CREDITS

- May carryover to the next reporting period excess credits
- Maximum of 12 credits may be carried forward
- Ten (10) general and two (2) ethics credits can be carried forward. Excess emerging issues credits can be carried forward as general credits, but not as emerging issues credits

# INSUFFICIENT CREDITS



Options if sufficient credits are not earned by the end of the reporting period

# LATE COMPLIANCE REPORT

Complete credits by **March 31**  
immediately following reporting period

**AND**



Submit Reporting Affidavit by **April 1**  
immediately following reporting period

**AND**

Pay Late Compliance Report Fee

See Regulation 208.2.1 – for full text



# REQUEST A WAIVER

Regulation 210 - The Committee may grant extensions, waivers, or modifications of these regulations **in cases of undue hardship, infirmity, or other good cause**. Requests for extensions, waivers, or modifications shall be made in writing

*If requesting a waiver, strongly encouraged to submit the request by January 31 following the reporting period*

# QUESTIONS OR ASSISTANCE?

Contact: [Samar.Malik@courts.wa.gov](mailto:Samar.Malik@courts.wa.gov)

