	HOW TO COMPLETE OVER 1 400	
	HOW TO COMPLETE OVER 1,400 COMPLICATED CASES A YEAR WITH TWO FTE'S; THE STORY OF	
	TECHNOLOGY AND PARTNERSHIP	
		1
Pre	esenters:	
Self-Hel	ssman, Esq. p Clinic Coordinator, Bet Tzedek	-
Directing Bonnie	ertenthal, Esq. g Attorney, California Rural Legal Assistance Rose Hough, Esq. ng Attorney, California Administrative Office of the Courts (AOC) Center liles, Children & the Courts	
for Fami	ilies, Children & the Courts	
		<u> </u>
	CONSERVATORSHIP SELF-HELP	
	Bet Tzedek	

### Clinic Overview Conservatorship Self-Help □ Probate Conservatorship/Adult Guardianship Most States □ Issues that Conservatorships Address: $\hfill \square$ Aging population □ Developmentally Disabled Adults Conservatorship Self-Help □ Why Conservatorship is a priority: □ High Cost to Litigant □ Few Available Resources □ Litigants need assistance

### Self-Help "Plus" □ Conservatorships particularly well suited to Self-Help under Bet Tzedek Model □ Technically complicated ■ Complex forms Significant information required $lue{}$ Generally uncontested Litigants do not need representation in most cases Hearings last less than ten minutes Why Self-Help "Plus"?

Forms are complicated

 Service of Notice is complicated Litigants make too many errors

Litigants need assistance

paperwork after the hearing

their own

□ Follow-Up



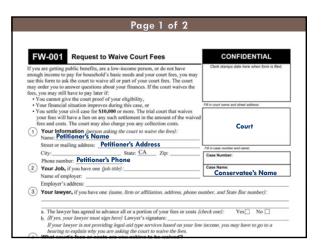
### Small Staff: Big Impact □ With just **two** full-time equivalent paid staff and up to twelve volunteers, technology allows the clinic to be broad yet efficient: □ 1400 new litigants each year □ 1000 new cases each year Over 40% of all petitions for Conservatorship in LA County □ Efficient staff work rate at 3-4 hours per □ Over **85% success rate** for litigants

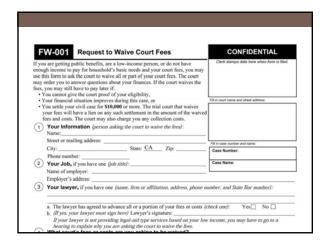
### Secrets to Success □ Innovative Use of Technology ■ Technology assists by accessing court files and for petition preparation □ Good systems make the work flow move smoother □ Best Inside the Courthouse □ Partnership with court helps identify issues early on □ Hearing scheduled in conjunction with clinic schedule Group Model □ Meet with over 25 families at once English and Spanish PowerPoint Easier to Establish no Attorney-Client Relationship Help more people Help more effectively – can go into more detail Camaraderie amongst the families Families tend to help each other Works for Limited C-ships because similar Limited C-ships are over 70% of C-ships filed in LA County. □ Partnership with Court – dropping off petitions □ Incorporate Pro Bono Partners Morgan Lewis, Sun America, Universal hosting clinics

### **Limited Conservatorship of the Person**

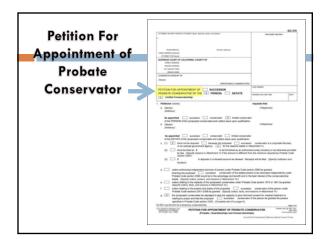
- 1. To fix the residence or specific dwelling of the limited conservatee
- 2. To have access to the confidential records and papers of the limited conservatee, including, but not limited to, Regional Center documents and school records;
- 3. To consent or withhold consent to the marriage or the entrance into a registered domestic partnership by the limited conservatee;
- 4. To control the right of the limited conservatee to contract;
- 5. To give or withhold consent to medical treatment for the limited conservatee;
- 6. To control the limited conservatee's social and sexual contacts and relationships; and
- 7. To make decisions concerning the limited conservatee's education.

## Request to Waive Court Fees Court Fees





		igreed to advant yer must sign he		tion of your fo s signature:	es or costs (	check one):	Yes No 🗆	
4) w	expla	inot providing in in why you are s or costs are	asking the co	urt to waive the	e fees.	v Income, you m	nay have to go to a	
X .						ees and Costs (1	form FW-001-INFO)	.)
						ourt (See Inform	nation Sheet on Waive	er of
5) Why		rt Fees and Co						
a N		ing the court				ет Пеер П	County Relief/Gener	nd.
a. DO							NF (Tribal Temporar	
							nd and Disabled)	
ь. 🗆	My gross me	onthly househol	d income (be	fore deductions	s for taxes) is	s less than the ar	mount listed below.	
		5b you must fi.						
	Family Size	Family Income	Family Size	Family Income	Family Size	Family Income	If more than 6 people	1
	1	\$1,134.38	3	\$1,930.21	5	\$2,726.05	at home, add \$397.92	
	2	\$1,532.30	4	\$2,328.13	6	\$3,123.96	for each extra person.	
c. 🗆							res. I ask the court to	
		waive all co	ourt fees	waive some of			ake payments over tir	ne
6) П (	(Explain):						u must fill out page 2.)	
						e in the last six in the last		
							nation I have provid	inet.
		achments is tr			Camorina	tillat till illioni	nation i nave provid	
Date:	Date				_			
Petitione	r Name,	based upon incom	e of proposed o			titioner Sig	n Here	
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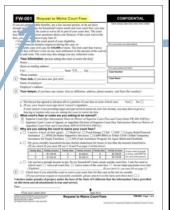


Page 1 of <i>7</i>	
	GC-310
ATTORNEY OR PARTY WITHOUT ATTORNEY glame, State day number; and address:  Petitioner's Name	FOR COURT USE ONLY
Petitioner's Address	
TELEPHONE NO. Petitioner's Phone FAX NO. (Cydrose): E-MAIL ACCRESS (Cydrose):	
ATTORNEY FOR Plannie Petitioner's Name, Petitioner in Pro Per (BT/XX) SUPERIOR COURT OF CALIFORNIA, COUNTY OF	-
STREET ACCRESS MALING ACCRESS COURT	
CITY AND ZIP CODE: BRANCH INAME: CONSERVATORSHIP OF	
(Name): Conservatee's Name	
PETITO R APPOINTMENT OF SSOR	CASE NUMBER
PRO ONSERVATOR OF THE X PERSON ESTATE	HEARING DATE AND TIME: DEPT.:
X Limited Conservatorship	
I. Petitioner (name): Petitioner's Name  a. (Name): Conservator's Name/Names	requests that (Telephone): Petitioner's
(Address): Petitioner Address	Phone
be appointed successor conservator X band conservation of the PERSON of the (proposed) conservatee and Letters issue upon qualification	l.
b. (Name): (Address):	(Telephone):
	00 140
ATTORNEY OR PARTY WITHOUT ATTORNEY Name, Stafe Bar number, and address):	GC-310 FOR COURT USE ONLY
TELEPHONE NO.: FAX.NO. (Options):	
TELEPHONE IO: FAX NO. (Optional): E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name):	
ATTORIES FOR Blance SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ACRESS.	1
STREET ACCHIESE MALENG ACCHIESE CITY AND ZIP CODE:	
CITY AND ZIP CODE: BRANCH NAME: CONSERVATORSHIP OF	
(Name):	
(PROPOSED) CONSERVATEE	CASE NAMBER
PETITION FOR APPOINTMENT OF SUCCESSOR PROBATE CONSERVATOR OF THE PERSON ESTATE	HEARING DATE AND TIME: DEPT.:
X Limited Conservatorship	
a. (Name):	requests that (Telephone):
(Address):	
be appointed successor conservator _X_ limited conservat of the PERSON of the (proposed) conservatee and Letters issue upon qualification	or
b. (Name):	(Telephone):
(Address):	
Petitioner (name): a. (Name):	requests that
a. (Name): (Address):	(Telephone):
be appointed successor conservator _X limited conservat	ior
of the PERSON of the (proposed) conservatee and Letters issue upon qualification b. (Name):	(Telephone):
(Address):	
be appoint successor conservator imited conservator of the EST conservate and Letter on qualification.	or
of the EST	or conservator is a corporate fiduciary
or an exempt government agency. X e reasons stated in A	Attachment 1c. sed surety company or as otherwise provided
by law. (Specify reasons in Attachment 1c if the amount is different fro section 2320.)	om the minimum required by Probate Code
(3) \$\int s in deposits in a blocked account be allowed. Reco	eipts will be filed. (Specify institution and
d. orders authorizing independent exercise of powers under Probate Code sec Granting the proposed successor conservator of the estate pow	vers to be exercised independently under
Probate Code section 2590 would be to the advantage and benefit and in the estate. (Specify orders, powers, and reasons in Attachment 1d.)	
<ul> <li>c. orders relating to the capacity of the (proposed) conservatee under Probate (Specify orders, facts, and reasons in Attachment 1e.)</li> </ul>	Code section 1873 or 1901 be granted.
fting to the powers and duties of the proposed success- Code sections 2351–2358 be granted. (Specify orders, facts, and	reasons in Attachment 1f.)
g. X coposed) conservatee be adjudged to lack the capacity to give inform healing by prayer and that the proposed successor conservator	ed consent for medical treatment or
specified in Probate Code section 2355. (Complete item 9 on page 6.) to NOT use this form for a temporary conservatorship.	Page 1 of 7
m Assigned for Mandatury Use Judicial Council of Cathonia (67-03-10 [New July 1, 2008]	NSERVATOR Probate Code, 55 1820, 1821, 2680-2682

### Curatela Limitada de la Persona

- 1. Arreglar la residencia o hogar específico de la persona bajo la curatela;
- 2. Tener acceso a los datos y papeles de la persona bajo la curatela, incluyendo, pero no limitado a, documentos del Centro Regional y de la escuela;
- 3. Consentir o no consentir al casamiento o pareja de hecho registrada por la persona bajo la curatela;
- 4. Controlar el derecho de contractar de la persona bajo la curatela ;
- 5. Dar o no dar consentimiento a tratamiento médico para la persona bajo la curatela;
- $\pmb{6}.$  Controlar los contactos sociales y sexuales y relaciones sexuales de la persona bajo la curatela; y
- 7. Hacer decisiones sobre la educación de la persona bajo la curatela.

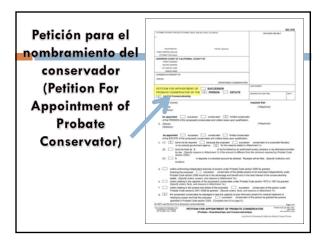
### Petición de renunciar los honorarios de la corte (Request to Waive Court Fees)



### 

FW-001 R	equest to Waiv	ve Court F	ees	CONFIDENTIAL	
f you are getting publi mough income to pay use this form to ask the nay order you to answ ees, you may still have	for household's basic e court to waive all or er questions about you e to pay later if:	needs and you part of your co ur finances. If	r court fees, you may ourt fees. The court	Clerk stamps date here when form is filed.	
	ne court proof of your ation improves during			Fill in court name and street address:	
1 Your Informat Name: Street or mailing	e court may also charg tion (person asking th g address:	e court to wai	we the fees):	FB in case number and name:	
		State: CA	_ Zip:	Case Number:	
				Case Name:	
Employer's addr					
3 Your lawyer, i		A		umber, and State Bar number):	

	(If yes, your law	yer must sign h	ere) Lawyer's				Yes□ No □	
(4) W	exple	s not providing in ain why you are as or costs are	asking the co	curt to waive the	e fees.	v income, you m	ay have to go to a	
( )	Swarrior Cour	t (See Informati	ion Sheet on I	Waiver of Supe	rior Court F		form FW-001-INFO).	
		rt, Court of App art Fees and Co.				ourt (See Inform	nation Sheet on Waive	er of
(5) W		king the court						
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	Assistance*	IHSS (In-Ho	mc oupporti	ve Services)	CalW	S or Tribal TA	NF (Tribal Temporary	1
							d and Disabled)	
ь.	(If you chec	k 5b you must fi.	Il out 7, 8 and	19 on page 2 o	f this form.)		mount listed below.	
		Family Income	Family Size	Family Income		Family Income	If more than 6 people	
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	_	47,000.00	_	44,040.00				
c.							res. I ask the court to ake payments over tin	
	(Explain):	□ waive all co	oun iees 🗆	waive some or			ake payments over til i must fill out page 2.)	ne
(6) r		you asked the o	ourt to waive	your court fee				
0		ous request is re						
					California	that the inform	nation I have provide	ed
	form and all at		ne and corre	ct.				
Date: _	La Fecha				De	mandante	Firmar Aqui	ĺ
ombre a	el demandante vint vour name l		e of proposed co os ingresos del pú		ion here			_
7								



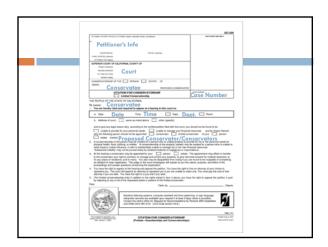
Página 1 de 7	
	GC-310
ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Star number, and address):  Nombre del demandante	FOR COURT USE ONLY
Dirección del demandante	
TELEPHONE NO. Teléfono del demandante comme	
ATTORNEY FOR PRIME. Nombre del demandante, Petitioner in Pro Per (BT/X SUPERIOR COURT OF CALIFORNIA, COUNTY OF	(X)
MALING ACCRESS: Dirección de la corte	
CITY AND ZIP CODE: BRANCH NAME:	
CONSERVATORSHIP OF (Name): Nombre de la persona bajo la curatela	
(PROPOSED) CONSERVATEE	CASE NUMBER:
PETITOR APPOINTMENT OF CSSOR PRO CONSERVATOR OF THE X PERSON ESTATE X Dimmad Conservatorship	HEARING DATE AND TIME: DEPT:
Petitioner (name): Nombre del demandante     (Name): Nombre/Nombres de los Conservadore	requests that (Telephone): Teléfono del
(Address): Dirección del demandante	demandante
be appointed successor conservator X and conservator of the PERSON of the (proposed) conservatee and Letters issue upon qualification.	
b. (Name): (Address):	(Telephone):
ATTORNEY OR PARTY WITHOUT ATTORNEY plane. Stale Star number, and address:	GC-310
	rom coom; sell ONLF
TELEPHONE NO: FAX NO. (Optione): E-MAIL ADDRESS (Optione):	
ATTORNEY FOR (Name): SUPERIOR COURT OF CALIFORNIA, COUNTY OF	
STREET ADDRESS MALING ADDRESS	
CITY AND ZIP CODE:  BRANCH NAME:  CONSERVATORS AND OF	
CONSERVATORSHIP OF (Name):	
(PROPOSED) CONSERVATEE	CASE NUMBER
PETITION FOR APPOINTMENT OF SUCCESSOR PROBATE CONSERVATOR OF THE X PERSON ESTATE	HEARING DATE AND TIME: DEPT.:
X Limited Conservatorship	
a. (Name):	requests that (Telephone):
(Address):	
be appointed successor conservator X limited conservator of the PERSON of the (proposed) conservatee and Letters issue upon qualification.	
b. (Name): (Address):	(Telephone):
Petitioner (name):	requests that
a. (Name): (Address):	(Telephone):
be appointed successor conservator X limited conservato	,
of the PERSON of the (proposed) conservatee and Letters issue upon qualification. b. (Name):	(Telephone):
(Address):	
be appoint successor conservator similar of the EST on (proposed) conservatee and Letty on qualification.	•
c. (1) X born not be required because the successo	r conservator is a corporate fiduciary
or an exempt government agency.    to be furnished by an authorize to be furnished by an authorize	decorate assessment and although the second day of
by law. (Specify reasons in Attachment 1c if the amount is different from section 2320.)	m the minimum required by Probate Code
(3) \$\square \$ in deposits in a blocked account be allowed. Receil location):	pts will be filed. (Specify institution and
d. orders authorizing independent exercise of powers under Probate Code sect	ion 2590 be granted.
Granting the proposed successor conservator of the estate power Probate Code section 2590 would be to the advantage and benefit and in the	ers to be exercised independently under
estate. (Specify orders, powers, and reasons in Attachment 1d.) e. criders relating to the capacity of the (proposed) conservatee under Probate (Specify orders, facts, and reasons in Attachment 1e.)	
fting to the powers and duties of the proposed successor	r conservator of the person under
Code sections 2351–2358 be granted. (Specify orders, facts, and n g. X roposed) conservatee be adjudged to lack the capacity to give informe	easons in Attachment 1f.) d consent for medical treatment or
healing by prayer and that the proposed successor conservator of specified in Probate Code section 2355. (Complete item 9 on page 6.)	of the person be granted the powers
Do NOT use this form for a temporary conservatorship.  From Adapted for Manieters Use Jackson Country of California  PETITION FOR APPOINTMENT OF PROBATE CON	Page 1 of 7  Probate Code, \$6 1600, 1621,
TELLIFORM OF PROBATE CON	200-2002



### **Original Citation**

-The person who gave the proposed conservatee the copy must fill out highlighted parts: (1) the date and time the conservatee was served, (2) the name and address of the person who served the conservateee, and (3) the date and signature.

-You must mail the form to the Probate Clerk in attached -envelope.



CONSCINENTIAL OF ANNU STATE OF	
All the time of convice I was at least 16 years of age and not a party to the conding. I served coaples of the Closion for Conservationing and the Politics for Apparetiment of Politics Conservation.	
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COLIDOR FOR CONSISTENT AND	



### **PVP Attorney Appointed**

- PVP Attorney will represent the interests of the proposed conservatee
- □ They will contact you to arrange a time to meet with the proposed conservatee
- □ They are not your attorney, but they should be helpful throughout the process

### **Regional Center Report**

- □ The Regional Center must make a report regarding the proposed the conservatee
- The court will not decide the case until this report is
- You can contact the regional center to make sure they are on top of things

### **Notice Of Hearing**

- Bet Tzedek will mail to all relatives listed on the petition a Notice of Hearing
- Bet Tzedek will also mail a Notice of Hearing to the Regional Center
- □ This will inform any interested person that a petition has been filed and when the hearing is

### **Capacity Declaration**

- □ Most likely you have already filed this
- □ This is the form that the doctor fills out
- ☐ If you have not submitted this form you must do so ASAP
- Your case will not be heard without it

### **Probate Notes**

- Not more than a week before your hearing you can check the Los Angeles Superior Court Website for Probate Notes
- ${\color{red}\blacksquare}\ {\color{blue} http://www.lasuperiorcourt.org/probatenotes/}$

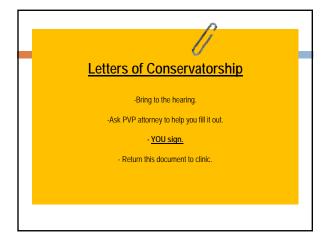


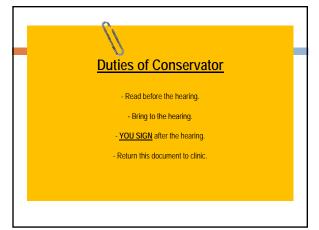




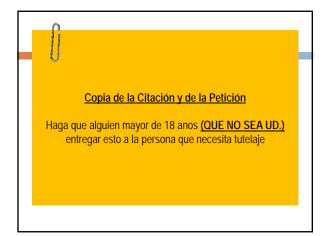








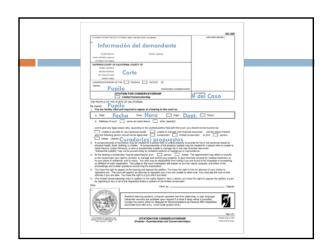




### Citación Original

-La misma persona que entrego el papeleo al que necesita tutelaje/conservatoria, tiene que llenar las partes que están señaladas: (1) fecha y hora; (2) nombre y dirección de la persona que hizo la entrega de papeles, (3) también que firme y ponga fecha.

-Ud. Necesita enviarlos de regreso a la Corte de Probate en el sobre incluido.



CONSERVATION OF PRINCE  PUPIO  PROCE OF SERVAN  The Conservation is the last the conservation of the Conse	
2. a. Passon cloud planning. Pupillo	
Preservation of the preservation of the security of the preservation of the prese	
Professional Section Annual Confession	
CITATION FOR CORRESENATORISESP Products—Guardiannings and Consentationhips)	



### **PVP** Abogado Asignado

- PVP Abogado representará los intereses del pupilo propuesta
- Les contactará para arreglar una cita de conocer el pupilo propuesta
- No es su abogado, pero debe ayudar Uds. en el proceso

### Informe del Centro Regional

- □ El Centro Regional tiene que hacer un informe en cuanto al pupilo propuesta.
- La corte no decidirá el caso hasta que el informe esté entreaado
- Ud. puede contactar el centro regional para verificar que están preparando el informe

### Aviso de una Audiencia

- Bet Tzedek enviará un Aviso de una Audiencia a todos los parientes indicados en la petición.
- Bet Tzedek también enviará un Aviso de una Audiencia al Centro Regional
- El Aviso informará cualquier persona interesado que un petición fue archivado con la corte y cuando sucederá la audiencia

### Declaración de Capacidad

- □ Es probable que ya ha archivado este documento
- □ Es el formulario que llena el doctor
- □ Si no ha archivado este documento tiene que archivarlo lo más antes que sea posible
- □ La corte no va a darle una audiencia sin el documento

### Notas de la corte de sucesiones y tutelas

- Una semana antes de su audiencia Ud. puede ver notas sobre su audiencia en el sitio de web de la corte suprema de Los Angeles.
- http://www.lasuperiorcourt.org/probatenotes/











### Cartas de Tutelaje

-Traer a la audiencia.

-Pregunte al abogado que le ayude a llenarlas .

-Ud. Las Firma

-Regresar a la clínica.

### Deberes del Conservador

-Traer el día de la audiencia

<u>-Firmar</u> después de la audiencia

-Regresar a la clínica

### Determinacion del Nivel de Cuidado Adecuado del Pupilo -Llenar antes de audiencia. -Regresar a la clinica después de la audiencia.

# Impact Of Technology

### **Old Process**

- Preparing the forms for Conservatorship without technology:
  - □ Took 1-5 hours per case to prepare
  - Memo for Volunteers to Complete the forms
  - Litigants had to come back for appointment once forms processed by hand



### **New Process**

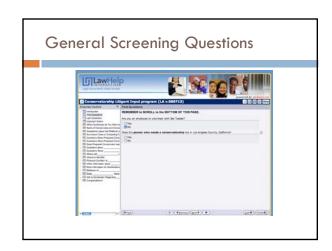
- Customized Computer Program for Conservatorships saves several hours of work per case:
  - Harry Jacobs
  - Using LawHelp Interactive
  - □ Input simple Questionnaire into program
  - □ Prepare all forms in 15-30 minutes!
  - □ Automate all forms

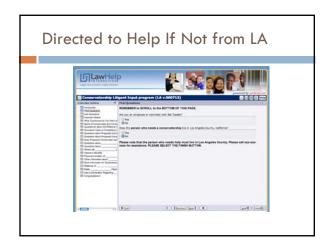


Law Help Interactive "LHI" Program	
For the control halong \$1.0 May 1 miles have \$2.000 for the control of the contro	
Technology Means More Services  New Pasadena Courthouse System Volunteer based Litigants put on the computer directly Cuts out manual transfer by volunteers Remote supervision by attorney to review the forms online! Removes need for additional meetings with litigant	
Emerging Uses of Technology  New Technologies Means Extended Reach and Greater Efficiency  Antelope Valley Very little volunteers used at the Court. Litigants put on the computer Remote supervision by volunteers and attorney from our office	
Remote supervision by volunteers and afforney from our office     More Pro Bono/Volunteers available in Urban areas than Rural areas like the Antelope Valley     Done by mail and the Phone     Now for Limited Conservatorships – will expand later to Non-Limited Conservatorships	





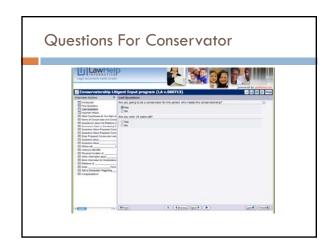


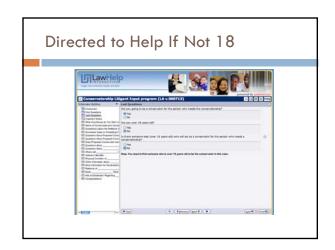






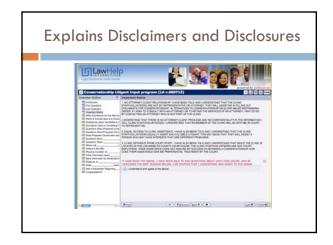






# Directed to Help If Large Estate | Consequence | Conseque





The Future	
Provide More Access to Services	
<ul> <li>Allow litigants to start process at home, work, or other locations.</li> <li>Fill out intake documents</li> <li>Schedule appointments</li> </ul>	
□ Track activity on their case. □ Adds convenience, reduces errors	
Expand to Other Counties	
<ul> <li>Work with other non-profit groups and courts to make conservatorship and other services for seniors available in more counties</li> <li>This program has already been adapted by the AOC to expand to Santa Barbara</li> </ul>	
Statewide Vision	
<b>Bonnie Hough</b> , Managing Attorney, California Administrative Office of the Courts	

Questions?	
Discussion	
Statewide Replication	
Statewide Replication	
Replication in other states?	
	-
<u> </u>	1
More Information	
□ Check out Making Self-Help Work: Bet Tzedek's	
Conservatorship Clinic:  http://povertylaw.org/communication/advocacy-	
stories/bertenthal  Contact:	
Josh Passman, jpassman@bettzedek.org	
<ul><li>Philip Bertenthal, pbertenthal@crla.org</li><li>Bonnie Hough, Bonnie.Hough@jud.ca.gov</li></ul>	