



Florida State Guardianship Association

FSGA BULLETIN

Volume 5 Edition #1

FSGA's Mission — FL State Guardianship Asso. is dedicated to the protection of the dignity and rights of incapacitated persons and to increasing the professionalism of guardianship through education, networking and legislative action.

*Happy Holidays and
Best Wishes*

→ **Eldercaring Coordination: Why If a Guardian is on the Case?** ←

FSGA is excited to announce, a free training in Eldercaring Coordination. BrightStar Home Care and Medical Staffing is generously sponsoring this educational event. Session is for a professional wanting insight to Eldercaring Coordination.

Webinar will be held via **ZOOM January 21, 2022, at 12:00 Noon.**

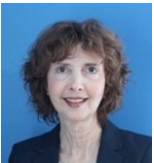
A court-ordered process for aging persons and their families, legally authorized decision-makers, and others who are court-ordered or invited to participate, that helps resolve disputes regarding ageing persons' autonomy and safety.

Approved for 1 CEU/CLE for guardians and EXAMINERS and Attorneys.



The **Honorable Michelle Morley**, Circuit Court Judge, assigned to family, probate, guardianship and Mental Health Divisions. She is Co-Chair of the FL Eldercaring Coordination Initiative.

Linda Fieldstone, M.Ed. Co-Chair of the Association of Conflict Resolution/Florida Chapter of Family and Conciliation Courts Elder Justice Initiative on Eldercaring Coordination.



Jennifer Branch, BSW, Court Counselor, 13th Judicial Circuit's Elder Justice Center. Teaches guardianship training courses, is the Program Site Administrator for the Eldercaring Coordination Project.


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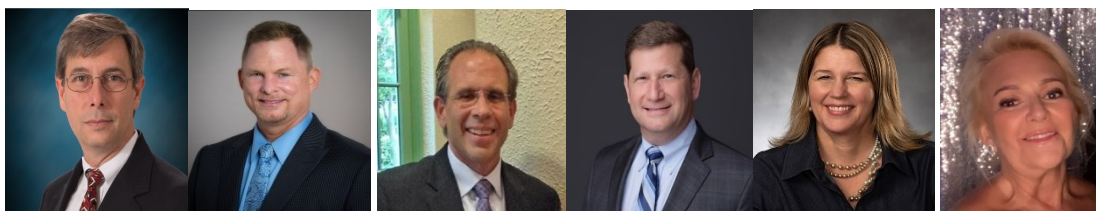
Register Here

The Florida State Guardianship Association, Inc. is a nonprofit corporation, an affiliate of the National Guardianship Association.

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THANK YOU TO OUR SPEAKERS AND SPONSORS

Lance M. McKinney, PA, Dr. Brian Kiedrowski, David Mangiero, Esq., and Mark Vernick, Shannon Miller, Esq., Jody Leslie, Esq.



Vernick
Financial



Sundae



PRESIDENT'S CORNER

Hello folks,

From all the feedback received, it appears everyone that attended in-person or virtually appreciated the recent Annual Conference. We definitely had a great group of presenters and very good topics specifically tailored for FSGA. Thank you again to all those that assisted with the event, and also to all those that attended and participated as well as to all the sponsors!

The Events/Conference and Education Committees have already started working on 2022. Please note these **"Save-the-dates"** at this time:

- the 3rd Annual Ethics Symposium March 11, 2022 (virtual format);
- and the 35th Annual Conference July 21-22, 2022, 2-day event in-person Sarasota Hyatt and Hybrid.

FSGA is continuing to improve. Soon there will be a roll-out of additional member benefits, one of which we first mentioned during the conference. Stay tuned!

As we all know, the last year and half has been quite problematic. What we do is never easy. The pandemic has been terrible. And too many unfortunately spend a great deal feeding false and misleading narratives. FSGA stood up to some of this during a recent effort with an ill-conceived task force.

Nevertheless, we've done good and very gratifying work throughout. Our hopes are high for next year. Please continue to be safe, prudent, and healthy.

Your individual participation and feedback is always needed and welcomed. ***The merriest of holidays, and best wishes to everybody!***

Thank you!

Carlos McDonald

FSGA President



IN THE NEWS



You may recall listening to Dr. K discussing this very topic during our October Annual Conference. Trend certainly important to watch and see.

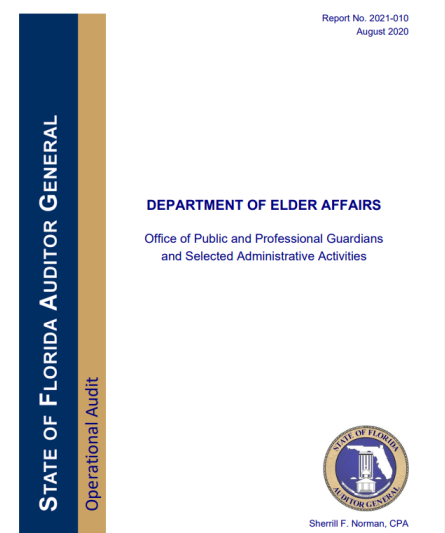
"Physician pay cuts are another threat to independent practices" — 11/13/21

On Nov. 2, Medicare announced that surgeons will see a 9 percent cut in payment for medical services starting Jan. 1, 2022. Obviously, physicians aren't excited about this, but these types of political decisions have enormous consequences for our entire healthcare system. [READ MORE](#)

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Florida's Auditor General released an Operational Audit regarding OPPG within Dept. of Elder Affairs back in August 2020. Interesting read and for your information.

For the complete report, please [click here](#).



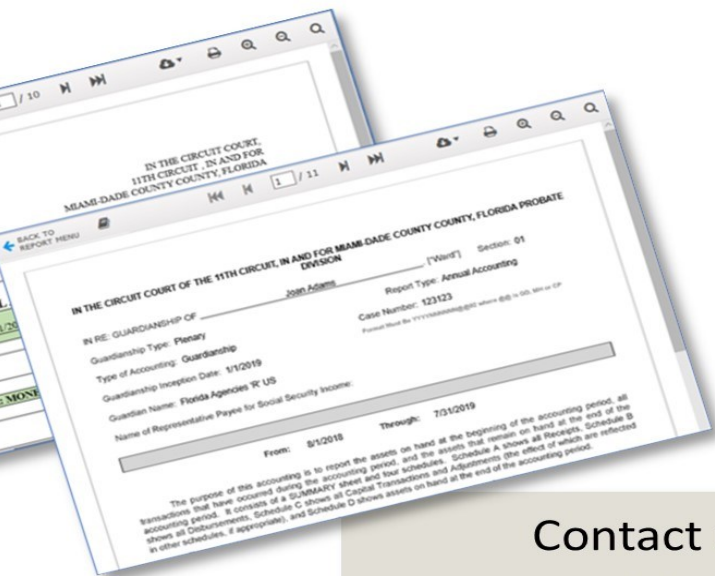
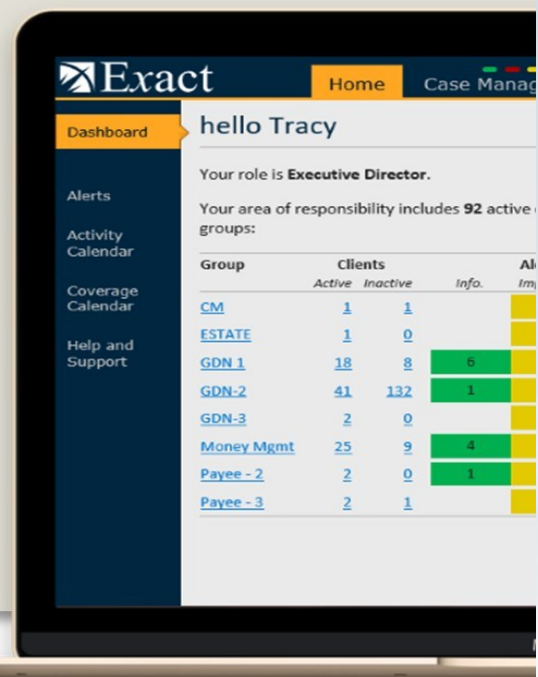


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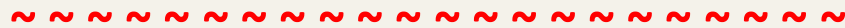
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FSGA WORKING FOR YOU IN TALLAHASSEE



Meetings of various Legislative Committees concluded in early December. The actual Legislative Session commences soon on January 11th. Much activity has revolved around reapportionment, or the redrawing of all the legislative districts per the 2020 Census.

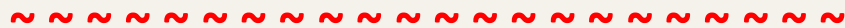
One piece of legislation filed so far of interest is the “Florida Guardianship Jurisdiction Act”. Sponsors are Senator Danny Burgess from Zephyrhills (SB 1032), and Representative Traci Koster from Safety Harbor (HB 845). In essence this is the “Uniform Guardianship Act” (UAGPPJA) across state lines.



Dept. of Elder Affairs Secretary Richard Prudom is retiring from Florida state government after a long career in public service. Secretary Prudom was always available to meet with FSGA, and to discuss the issues of interest for which we have expressed appreciation. We wish him the best.



Michelle Branham of Jacksonville Beach, was named by the Governor to succeed as Secretary. She has served as vice president of public policy for the Florida Alzheimer’s Association, has earned her bachelor’s degree in political science from Stetson University and her master’s degree in theological studies and human relations from Emory University. We welcome Secretary Branham and look forward to being of assistance to the new Secretary.



As noted previously, there will be many “musical chairs” played out, and many battles fought over the newly redrawn districts in 2022. Nonetheless, it is imperative that all of FSGA’s Chapters continue every effort possible to engage with legislators, and even your respective Clerks.

Recently Pam Wiener attended a Palm Beach Legislative Delegation meeting and spoke on everyone’s behalf. (seen in photo)

Others such as Lesley Holman and Bambi Nikolas-Williams have held meetings with their area legislators. Also Barbara Stone and Sara Fuentes met with legislative staff, while Valerie Grim and Robin Phemister have made efforts as well.

FSGA is always available to assist Chapters make connections with their Legislators. It is integral to the associations’ Mission Statement.



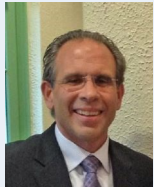
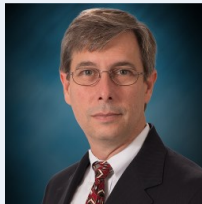
FSGA EDUCATION OFFERINGS

AN INDEPTH LOOK AT GUARDIANSHIP TOPICS

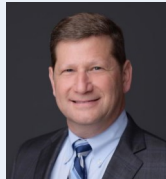
ONLINE CEU OFFERINGS

Visit FSGA's video library for opportunities available. These offerings take a more in-depth approach to featured topics. Great for new and seasoned guardians. Don't forget to login for your member discount which allows you to shop for \$25.00 per credit hour.

**Ethics in Guardianship;
also Conflict of Interest**
Lance Mc Kinney, Esq.



Fiduciary Duty
*David Mangiero, Esq.,
and Mark Vernick*



Physicians view and Guardians
Dr. Brian Kierdrowski

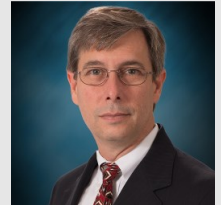
[CLICK HERE FOR MORE INFORMATION](#)



EXAMINING COMMITTEE TRAINING

4 -hour Initial Examining Committee Course

Join Elder Law Attorney,
Lance M. Mc Kinney, Esq., for
the Florida Examiners initial
4-hour training course for
Examining Committee Members.



2 -hour Examining Committee Update Course



Join Elder Law Attorney,
Enrique Zamora, Esq., and
**AHH, Clinical Services Director,
Beth Halprin, MSN, RN APRN,
PMHNP** for a thorough Florida
Examiners 2-hour update course for
Examining Committee Members.



Upon completion a certificate of completion will be issued. (Courses may be just one of several requirements to serve as an examiner. Contact the Clerk of the Court in the circuit of practice for the full requirements)

CASE STUDY

Martha

A guardianship/case management agency received a call from Lillian, regarding her sister Martha. Lillian lives in Colorado and was concerned because she hadn't been able to reach Martha in more than a week.

Up until then, Martha had been living independently in her own condominium. But a neighbor had noticed that her home was unlivable due to her frailty, incontinence and hoarding lifestyle. It also appeared she had not eaten for a few days. Concerned, he called 911 and Martha was admitted to the hospital. Subsequently, she was discharged to a small group home. A few days later, Martha called for a private medical transport to take her home, but instead they delivered her to a different hospital. Upon discharge from that hospital, she was sent to a rehabilitation center.

They were unable to properly provide therapies because of Martha's mental state and dementia, so they arranged for her discharge, despite the sister's pleas to keep Martha as she believed it was unsafe for Martha to live alone. She was sent via a private medical transport back to her condominium, even though she had no keys to the home, no wallet and no fresh food in the home.

At this point, Lillian petitioned for an Agency to be guardian of Martha and her petition was granted by the court. The guardian cleaned out her condominium and sorted through her documents to find her key information and accumulated bills. The guardian was able to piece together her finances, as Martha had been unable to fully manage them properly for some time. The guardian found Martha a safe and clean assisted living community and sent Lillian a photo of Martha once she settled in. Lillian was appalled at how much weight Martha had lost since she last saw her, which triggered a complete health work-up, only to discover Martha had cancer. With the physician and the community's wellness team, the guardian created a treatment plan for her, but Martha was so weak she never improved enough to begin the treatment, subsequently dying.

Lillian stayed in contact with Martha until her passing. Lillian was very grateful that a guardian was able to step in and improve the end of Martha's life.





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Expert Tip: Use Check Lists

Ever gone to the store for bread and come home with two bags of groceries and no bread? This happens more times than we like to admit. In our busy lives, we are often distracted. That's the beauty of a checklist! By definition, "a checklist is a type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task." So, if a checklist can ensure that we come home from the store with a loaf of bread, how can we apply the same idea to the business of guardianship?

We talk a lot about best practices in Guardianship, but without a tool to help put those practices into play—consistently—we are subject to the limits of memory and attention. Using software with a checklist feature

overcomes those shortcomings by providing the framework to create a work flow process and track activity progress. SEM Applications Guardianship Software provides customizable checklist options that display activity due dates on the calendar and provide reports to list outstanding items.

A good Checklist doesn't need to be elaborate; it needs to be duplicable. Create checklists for accountability in court required activities, to establish a progression for assigned tasks, and as a way to define company procedures. Check List items should be meaningful activities and actions or items that are critical to success. A checklist that is too long or complex to comfortably manage or one that includes items that are only rarely necessary will be frustrating to update and maintain. Conversely, a checklist that is vague or overly generalized may not provide enough direction to be helpful.

Start with one set of vital tasks or focus on a process that has court required activities or tasks that could be easily missed or forgotten. Order the tasks by priority and then refine the list to contain only items critical to success. For example, a New Client Checklist would only need to include a task to "Close existing bank accounts" rather than multiple tasks to "Close Checking account" and "Close Savings account". A task to "Marshall all assets" might prove to be too general. It might be wiser to include options for specific types of assets (i.e. cash assets, real estate, etc.).

With customization options, you can make course corrections as you go until you have a Checklist that fits your needs perfectly!

Interested in other expert tips? Visit www.sem97.com or call 660-446-3031 to learn more about the features of our guardianship software.