

JBCC Texas Guardianship Registration and Training

Assisting the courts in protecting our most vulnerable citizens and their assets.



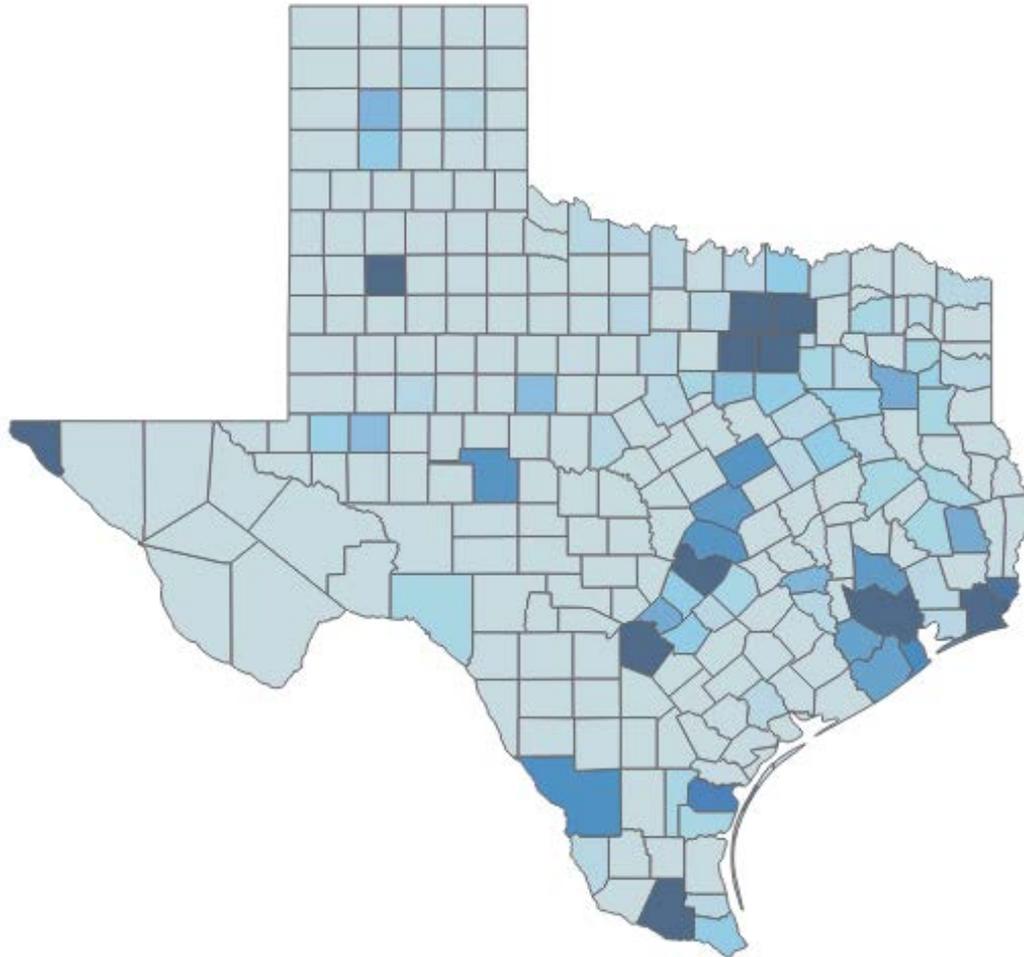
Judicial Branch Certification Commission (JBCC)

➤ *JBCC Overview*

- ✓ Registrations of Guardianships (SB 1096, June 1, 2018)
- ✓ Registrations of Guardianship Programs (SB 36, September 1, 2018)



50,000 (+) Active Guardianships



Total 254 Counties in Texas

- 10 Counties
- 18 Statutory Probate Courts
- Specialized staff, auditors and investigators

244 Counties

- County Judge
- County Court at Law Judges
- Lack personnel and resources
- Types: Family Members, Friends, Attorneys, Certified Guardians



Guardianship Compliance Project (GCP)

- Service to assist courts and clerks handling guardianship cases.
- Review all guardianship cases to identify compliance issues and reporting deficiencies by the guardian.
- Review annual accountings and report findings back to the court.
- Provides accurate list of active and closed cases.
- Prepare report for courts on findings.
- Develop best practices in managing guardianship cases.
- Prepare and send notices for the missing reports.
- Assist with compliance dockets.



Guardianship Compliance Project as of August 31, 2018



46/32

Courts and Counties involved in the guardianship compliance project



28,931

Guardianship cases reviewed by the guardianship compliance project



18,310

Guardianship cases recommended for closure with 3,328 deceased



10,621

Active guardianship cases



2808*

Guardianship cases found to be out of compliance with statutorily required reporting



35%*

Percentage of cases with missing reports of the person



44%*

Percentage of cases with missing initial inventories



48%*

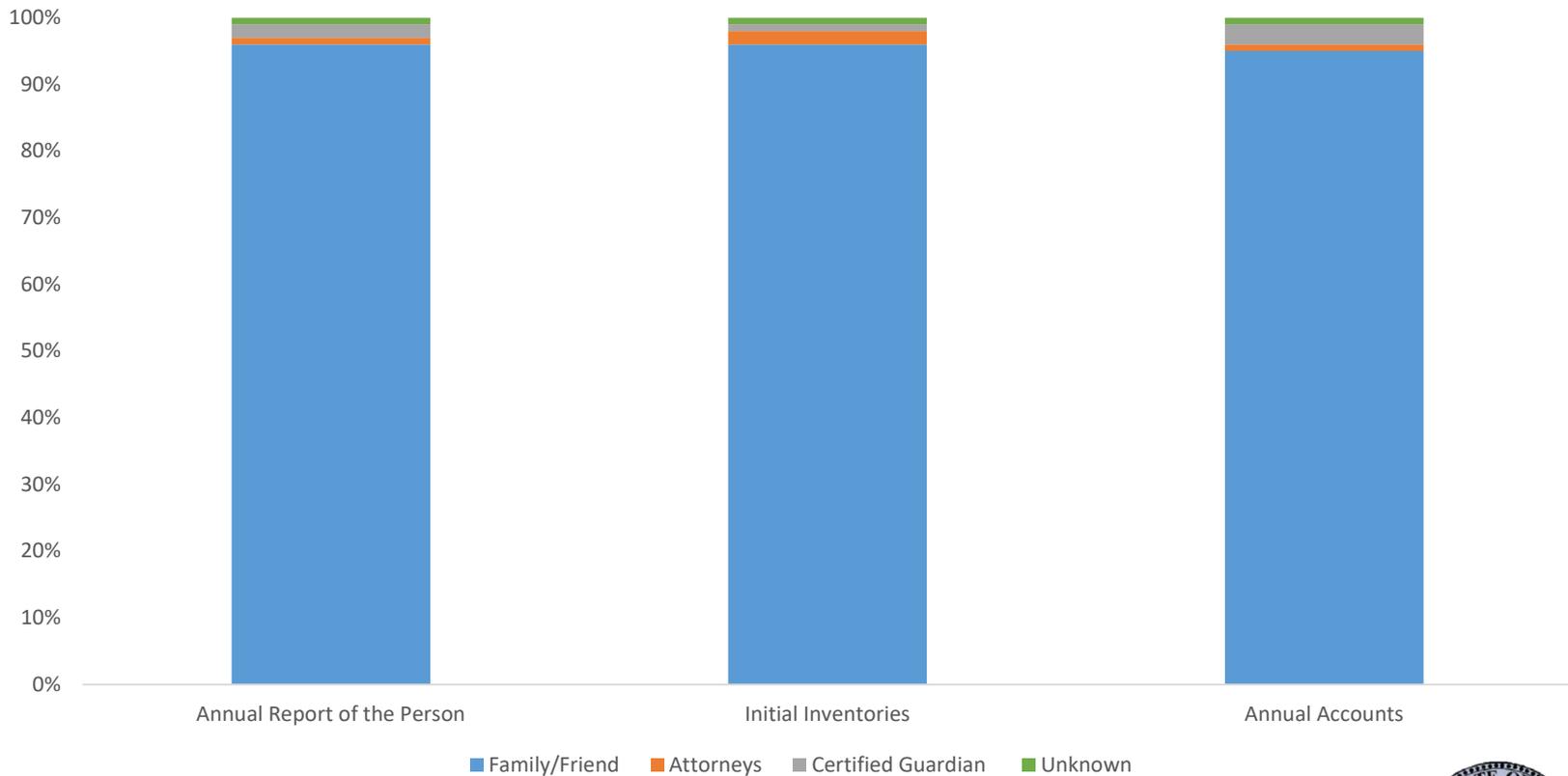
Percentage of cases with missing annual accountings

* Note: These statistics are reported for the 30 counties in which the initial review process has been completed. The number of active guardianships in those 30 counties totaled 6535. With 2,808 cases out of compliance with required reporting, the percentage of cases out of compliance is 43%.



Compliance by Guardian Type

Figure 2: Percentage of Reports Out of Compliance by Guardian Type



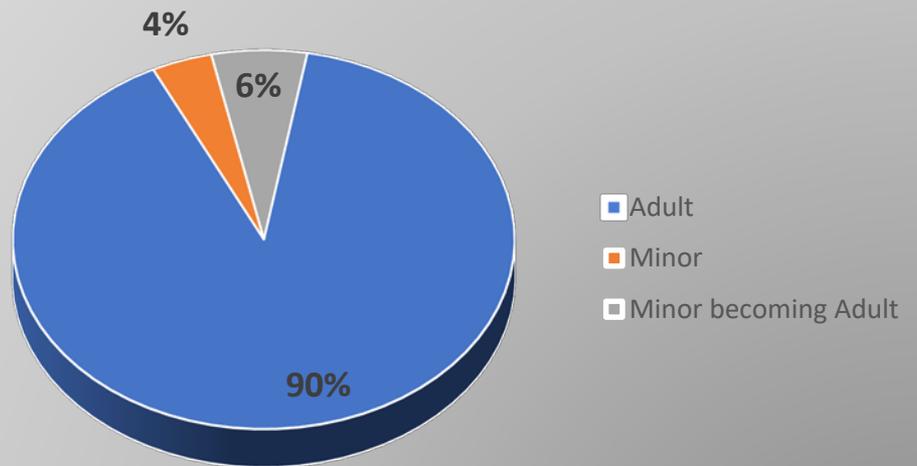
S.B. 1096

- S.B. 1096 implements recommendations from the Texas Judicial Council (TJC):
- Prior to Appointment:
 - All guardianships registered with the JBCC
 - JBCC to ensure that these guardians obtain proper training and criminal history checks.
- Registry available for query by law enforcement.
- SCOT Rules adopted
- No fee for the registration or training
- Effective June 1, 2018



Total
Registrations
Since June 1st

Total JBCC Registrations
11,677 Registered
2,959 "Learners" Completed Training



Guardianship Registration Information

- Effective June 1, 2018, each guardianship registered with the JBCC.
- Clerk of a court provides written notice of the requirement to register to each person who applies as a guardian and to each attorney who files an application.
- Each proposed guardian submits the following information to the JBCC:
 - ✓ the proposed guardian's name, and all former names;
 - ✓ the proposed guardian's physical address and mailing address if different, telephone number, email address, and other contact information, if any;
 - ✓ the proposed guardian's attorney's physical address and mailing address if different, telephone number, email address, and other contact information;
 - ✓ the name, sex, and date of birth of the proposed ward;
 - ✓ whether the proposed guardianship is of the person, the estate, or both;
 - ✓ whether the proposed guardianship is based upon incapacity or minority of the proposed ward;
 - ✓ the estimated value of the liquid assets of the proposed ward's estate;
 - ✓ the name of the court with jurisdiction over the guardianship proceeding; and
 - ✓ whether the proposed guardian is a certified guardian, attorney or a corporate fiduciary.



JBCC Website

The screenshot shows a web browser window with the URL www.txcourts.gov/jbcc/. The page header includes the text "Texas Judicial BRANCH" and a navigation menu with items: Home, Courts, Rules & Forms, Organizations, Publications & Training, Programs & Services, Judicial Data, eFile Texas, and Media. Below the navigation is a search bar labeled "Site Search". The main content area is titled "Judicial Branch Certification Commission" and includes a breadcrumb trail: Home / Organizations / Policy & Funding / Judicial Branch Certification Commission. On the left, there is a sidebar titled "JBCC HOME" with a list of links: Register a Guardianship, Court Reporters Certification, Guardianship Certification, Guardianship Programs, Process Server Certification, Licensed Court Interpreters, JBCC Statutes, Rules & Policies, Commission Members, Advisory Boards, Meetings & Agendas, Complaints, Request for Records, and Latest News & Updates. The main content area features a photo of the commission members with the caption: "Left to Right: Don Ford, III; Judge Polly Spencer; Velma Arellano; Judge Ben Woodward; Chairman Lee Hamilton; Judge Migdalia Lopez; Judge Sid Harle; Ann Murray Moore; and Mark Blenden". Below the photo is a text box stating: "The Judicial Branch Certification Commission (JBCC) oversees the certification, registration, and licensing of court reporters and court reporting firms, guardians, process servers, and licensed court interpreters." The footer contains contact information for Physical Address (205 W. 14th, Ste. 600, Austin, TX 78701), Mailing Address (PO Box 12066, Austin, TX 78711-2066), Phone (Main: 512-475-4368, Fax: 512-463-1117), Email (jbcc@txcourts.gov, ContinuingEd@txcourts.gov), Finance (Where the Money Goes, Report Fraud, Waste and Abuse), and Resources (Careers, Site Policies, Texas Homeland Security, Texas Veterans Portal, Texas.gov, TRAIL).



JBCC Guardianship Registration

TJB | JBCC | Register a Gu... x

Not secure | www.bxcourts.gov/jbcc/register-a-guardianship/

Apps TJB | JBCC ALIS - Online Licensing Texas Guardianship Tr... Egote Login Oracle | PeopleSoft Ent

Texas Judicial
BRANCH

Home Courts Rules & Forms **Organizations** Publications & Training Programs & Services Judicial Data eFile Texas Media

Register a Guardianship

Site Search

Home / Organizations / Policy & Funding / JBCC / Register a Guardianship

REGISTER A GUARDIANSHIP HOME

- Guardianship Training
- Criminal History Information
- Pre-existing Guardianships
- Guardianship Registration Rules and Resources
- JBCC Home

Registration of Guardianships (Effective June 1, 2018)

With our new guardianship registration program we are experiencing a high volume of applications and inquiries. Turnaround times are longer than usual. We thank you for your patience and apologize for the inconvenience.

- Please note – For guardians appointed after June 1, 2018, the deadline for the JBCC to provide notice to the clerk that a proposed guardian has submitted registration information and fulfilled the training and criminal background requirements is 10 days before the hearing. Nothing in statute or rule makes this notice a prerequisite to setting a hearing.
- Guardianship registrations will be processed in the order in which they are received.
- We are unable to expedite the registration processing based on a hearing date not being set by the Court.

JBCC Online Instructions & Registration

1. Select the "Guardians" tab, then select "Guardianship Registration: To Register a Guardianship".
2. Create a login name and password.
3. Enter the guardians profile with contact information.
4. Enter the guardianship information.
5. You must read, complete, and sign the attestation page prior to submitting your application.
6. Once you enter the online registration information, complete the online guardianship training.
 - Use Google Chrome to complete the training.
 - Mobile and Apple devices may be incompatible to complete this training.
 - The course will take approximately 1 hour.
 - Currently the training is only available in English. We are working on a Spanish version of the training.
7. Provide your training certificate to the court.
8. Register a Guardianship and complete the Guardianship Training Module using the red buttons below.

REGISTER A GUARDIANSHIP

GUARDIANSHIP TRAINING MODULE



ALiS - Online Licensing System - Internet Explorer
 https://jbcctexas.txcourts.gov/DefaultTexas.aspx

Work Queue Search | TJB | JBCC | Register a Guardia... | ALiS - Online Licensing System

File Edit View Favorites Tools Help
 Convert Select
 Google Search Share More >> Sign In

StudentLoans JBCC Licensing System TJB JBCC Portal System Login NCSC guardianship training ... OCA-2017 Session Trello



Texas Office of Court Administration Judicial Branch Certification Commission (JBCC)

Online Certification and Licensing System



USER LOGIN

Login Name

Password

[Forgot Login/Password](#) Login

Password is case sensitive.

SITE LINKS

To Search for Certified Guardians:
[Click Here](#)

To search for an approved Continuing Education Course for Guardian:
[Click Here](#)

For any questions please contact us at guardians@txcourts.gov. For more information, please [Click Here](#)

Court Reporters
Process Servers
Court Interpreters
Guardians

**Welcome to the online licensing and certification system for Texas
 Judicial Branch Certification Commission**

Register a Guardianship

Guardianship Registration
 To Register a Guardianship: [Click Here](#)

Professional Certified Guardians

Certified Guardians
 Existing Individuals/Firms registered with State [Click Here](#) to create online profile.

First Time Applicant
 To apply for new Guardian Certification: [Click Here](#)

Continuing Education Course Provider
 If you are a Continuing Education Course provider and need a course approval: [Click Here](#)

The Guardianship Certification program improves the standards for persons authorized to serve as guardians statewide. For more information on certification requirements, statutes, rules, policies and standards, please visit the JBCC website, <http://www.txcourts.gov/jbcc/guardianship-certification/>

We accept:










Initial User Registration - Guardians

Fields marked with asterisk (*) are required.

Guardian Information

Please complete the profile using the guardians name and contact information.

Last Name * First Name * Middle Name
Suffix DOB *

Guardian Mailing Address

Country *
Address * Apt/Unit/etc.
City * State/Province * Zip *
County * Primary Phone # - Ext * Alternate Phone # - Ext.
Fax Primary-Email * Alternate E-mail

Online Account Information

Login Name *
Password * Password is case sensitive and must be at least 8 characters long including: 1 upper case letter, 1 lower case letter, 1 number, and 1 special character.
Re-type Password *

Reset

Register

Back



Were you appointed guardian before June 1, 2018? Yes No Is this a temporary Guardianship? Yes No

Guardianship Type Estate total liquid assets
 County -- Choose One -- Court Name
 Guardian Type Judge's Name

Additional Information

Protected Person Information (Ward)

Last Name First Name
 DOB Gender
 Case Type

Attorney Information

Last Name First Name
 Bar Number

Case #
 Qualification Date

Protected Person Contact Information (Ward)

Country United States Apt/Unit/etc.
 Address Zip
 City State/Province TEXAS Alternate Phone # - Ext.
 County -- Choose One -- Primary Phone # - Ext.
 Fax Primary-E-mail Alternate E-mail

Attorney Contact Information

Country United States Apt/Unit/etc.
 Address Zip
 City State/Province TEXAS Alternate Phone # - Ext.
 County -- Choose One -- Primary Phone # - Ext.
 Fax Primary-E-mail Alternate E-mail

Emergency Contact Information Add

Please click 'Add' to add a new row.

Reset Next >>

Guardianship Registration Information

- JBCC will notify the court and the proposed guardian of receipt of the required information.
- JBCC may request clarification, correction, or completion of the information
- Submission of information does not constitute registration of the guardianship.
- A guardianship is not registered with the JBCC until the JBCC receives notice from the clerk of the court that the guardian has been appointed and the date of qualification.



Guardianship Registration- Training

- JBCC must include the following subjects in the training:
 - ✓ guardian's fiduciary duty to the ward;
 - ✓ laws relating to the practice of guardians, including actions guardians may take without court approval and actions requiring court approval;
 - ✓ requirement to file and maintain an adequate bond to protect the ward and the ward's estate;
 - ✓ content and information to include in inventories, annual accounts, annual reports of the person, final reports of the person, final accounts, and other filings with the court;
 - ✓ content and information to include in the annual report to the Commission;
 - ✓ alternatives to guardianship;
 - ✓ support and services available to wards;
 - ✓ Restoration;
 - ✓ the ward's bill of rights;
 - ✓ notification on health and residence to certain qualified relatives requesting information.

- Upon completion of the training, each proposed guardian will receive a certificate and provide to the court.

- A proposed guardian may not be appointed guardian unless the proposed guardian completes the training provided on the JBCC's website

- The proposed guardian must complete the training no later than 10 days before the court's hearing to consider the proposed guardian's appointment.

- <https://guardianship-txcourts.talentlms.com/catalog/info/id:144>



Home / Course catalog / Texas Guardianship Training



Get this course

Texas Guardianship Training

Guardianship

Description

- The components of this course will include:
1. Understanding Why Guardianship May be Necessary
 2. Overview of Alternatives to Guardianship
 3. Types of Guardianships
 4. Procedures to Establish a Guardianship
 5. Duties of the Guardian
 6. Reporting Requirements of the Guardian
 7. Modifying, Terminating, or Closing a Guardianship

*Course will take approximately 1 hour
*Use Google Chrome to complete training

How to Download Certificate

1. Upon completion, click the 'x' on the top right corner of the training. After doing so, you will be able to download a pdf file of the certificate.

This training was developed under grant number SJJ-17-E-138 from the State Justice Institute. The points of view expressed are those of the Office of Court Administration and do not necessarily represent the official position or policies of the State Justice Institute.

Content

- Guardianship Training

Completion rules

- All units must be completed
- Leads to a certification with a duration: Forever



Get this course

Texas Guardianship Training

Signup

Last name

Email address

Username

Password

Are you taking this training to fulfill the requirement to become appointed?

Have you registered the guardianship with JBCC?

County Where Guardianship Filed

policies of the State Justice Institute.

Content

- Guardianship Training

Completion rules

- All units must be completed
- Leads to a certification with a duration: Forever

[return to catalog](#)

Guardianship Training





Guardian Training- Victor



Course Roadmap

- Understanding Why Guardianship May Be Necessary
- Overview of Alternatives to Guardianship
- Types of Guardianship
- Procedures to Establish a Guardianship
- Duties of the Guardian
- Reporting Requirements of the Guardian
- Modifying, Terminating, or Closing a Guardianship

Judicial Branch Certification Commission

This certification is awarded to

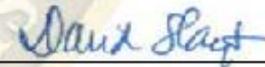
Nitu Gill

For successfully completing the course

Texas Guardianship Training

04/09/2018

Issued Date



David Slayton, Administrative Director



TEXAS OFFICE OF COURT ADMINISTRATION

GUARDIANSHIP TRAINING

OFFICE *of* COURT ADMINISTRATION



Guardianship Training Feedback

“Subject: Guardianship Training PDF File availability?”

Hello

The training is wonderful and very informative.

Is there a way we can get PDF or word copy of the entire training so we can share with others as needed...

I would appreciate any help provided on this.”

“Subject: FW: certification-Texas-Guardianship-Training.pdf

This is great training. Yes, I would encourage all familial guardians to take it even if it isn't a requirement (our lawyers are supposed to walk us through all of this information before we apply) because it contains a lot of additional information and is presented in a user friendly format (unlike their website...).

Again, thank you for your support. You are a great asset to the probate court.

Best regards,”



Guardianship Registration- Criminal History

- Effective June 1, 2018, the JBCC must conduct a proposed guardian's criminal history records upon receipt of information regarding the proposed guardian unless the proposed guardian is a certified guardian, a provisionally certified guardian, an attorney, or a corporate fiduciary.
- A proposed guardian may not be appointed guardian, or temporary guardian, unless:
 - ✓ DPS search via name and DOB search if the value of the estimated liquid assets in the estate of the proposed ward is \$50,000 or less; or
 - ✓ DPS and FBI search, via fingerprint, if the value of the liquid assets of the proposed ward's estate exceed \$50,000.
- The JBCC must provide the criminal history background information to the clerk.
- The clerk must provide the information to the court for the exclusive use of the judge.
- The clerk must not file the criminal history background information in the court file. Confidentiality, encrypted PDF, record destruction.
- A hearing to appoint a proposed guardian may occur no earlier than 10 days after receipt of the criminal history background information.



Guardianship Registration- Notice to JBCC

- The clerk notifies the JBCC of the date of the guardian's qualification. JBCC will update registration.
- The clerk of a court which removes a guardian or terminates a guardianship must send notice of the removal or termination to the JBCC within 10 days. JBCC will update registration.
- The clerk of the court which transfers a guardianship to another venue or jurisdiction must notify the JBCC. JBCC will update registration.



Guardianship Registration- Pre-existing Guardianships

- Each guardian appointed before June 1, 2018 must register with the JBCC by filing the information.
- The probate court must provide to each guardian notice of the registration requirement no later than the next annual report or annual accounting is filed with the court.
- Guardianship training and criminal history not required unless ordered to do so by the court.



Registration Summary

- Guardianship Application filed
- JBCC email filer about registration requirements
- Clerk notify filer of registration requirements
- Guardian provide information in JBCC system
- JBCC Criminal History and provide to Clerk
- JBCC provides certificate and confirms training
- Clerk notify JBCC of qualification date
- Clerk notify JBCC of transfer, removal, closure or successor
- Effective June 1,2018



Guardianship
Compliance
Project (GCP)

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(JBCC)

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