

Probate Partners



What is Probate Partners? Probate Partners is a program that was created by Montgomery County Probate Court in 2016. Probate Partners is supervised by the Court's Social Worker, who serves as a Field Instructor for students in accredited social work programs. Under the Social Worker's supervision, these students perform wellness visits of persons under guardianship in Montgomery County.

Why is Probate Partners necessary? The Court is the superior guardian of persons under guardianship in Montgomery County. These persons are some of the most vulnerable members of our community – the elderly, the developmentally disabled, and the mentally ill. Before this program was created, the Court might have had only **one** face-to-face visit with a person under guardianship. One visit simply was not enough to ensure that the needs of these persons were being met.

But I am the parent of the person under guardianship! I have been caring for my loved one for the past 20 years. Can I opt out of Probate Partners? The Court understands that many guardians are also the grandparent, parent, sibling, or child of the person under guardianship. The vast majority of these guardians are devoted to the care and well-being of their loved one. However, as superior guardian, the Court has a responsibility to see for itself that the needs of the person under guardianship are being met. Accordingly, you may not opt out of Probate Partners.

What do the students do to prepare for wellness visits? To prepare for a wellness visit, the student reviews the person's case file. The case file includes all of the documents that have been filed in the case, including Guardian's Reports, Annual Guardianship Plans, and Statements of Expert Evaluation. These documents provide valuable information and insight about the person's condition, and guide the student in planning the visit. Once the student has planned the visit, he or she attempts to contact the person's guardian to set a day and time for the visit.

What is a wellness visit like? A wellness visit lasts 10-15 minutes. While most visits take place at the person's residence, the visit may also take place at a school, workshop, library, or other location. During the visit, the student has an opportunity to see the person. The student also has the opportunity to speak with the person, and even more importantly, listen to the person.

What happens after the wellness visit? After the wellness visit, the student completes and files a report letting the Court know how the visit went.

How many wellness visits can I expect? The Court is the superior guardian of more than 1,000 adults under guardianship. That is a lot of wellness visits! While there may be exceptions, in most cases, no more than one wellness visit will be performed every other year.

What if I still have questions or concerns? If you still have questions or concerns, you may contact the Court's Social Worker and Field Instructor, Shawnieka Pope, at 937-496-7041.

