

Guardianship Committee

Proposed Minutes from Friday, January 16, 2026

- I. Present – Nugent, Bradley, Houk, Roesner, Meltzer
Staff – Parker
- II. Updates from OJA Staff
 - Court Monitor Pilot Project
 - Looking for funding to expand to 1-2 more sites
 - Want to find a connection to pre-existing VASIA programs
 - Guardianship Oversight Task Force
 - Final report was submitted on December 1 to the Supreme Court
 - Presenting at administrative conference in late February
 - Draft sent out to group by email – let Nick know if you have any questions/comments
 - Self-Help Guardianship Documents
 - Created workgroup through WINGS to help with consistent forms (based on group feedback)
 - Will bring the copies WINGS comes up with to a future Committee meeting – possibly to include in our Benchbook in the future
- III. Updates from Judicial Officers
 - AI generated pro se pleadings – discussion with the group
 - Petitions from websites like LegalZoom are being used as a base petition, which is problematic because some use false citations and/or jumble 3-4 different ideas in the same petition
 - Some have caught attorneys using AI and citing cases that don't exist
 - Serial filer issues (in guardianship and estate administrations) – these filers (generally, when they are written out of a Will) file objections and requests, developing their forms by AI
 - These are legitimate-looking pleadings that are flooding the court (sometimes there is a hefty 8+ page response about why the court should issue a stay, etc. – this is wasting court time to review)
 - Though the AI writing is tighter/more readable, it has replaced handwritten letters (where authenticity was easier to prove) and the writing may or may not be relevant
 - Key factors are buried in the document – argument shifts happen quickly – dipping into multiple theories (5 different things to deal with in the same document)
- IV. Review of Cases, Trainings, and Resources
 - Winter Symposium (December 18, 2025)
 - Positive reviews on most speakers – will do the event again in 2026
 - Summer Symposium (June 25, 2026)
 - Request for proposals until end of February – if you would like to speak, let Nick Parker know
 - Will likely have a judicial panel again

- Other Trainings / Local Bar / CLEs
 - Bench Bar – Monroe County – February 27, 2026 – details coming soon

V. Action Items

- Benchbook Forms
 - Are there any new forms that need to be created?
 - Ideas include updating the notice form; standard form for incomplete filings
 - Share any of your forms with Nick to possibly include in the Benchbook
 - Updates to Physician's Report will likely be postponed due to a workgroup being formed on this topic through the Guardianship Oversight Task Force
- VASIA Court-Ordered Fees (IC 29-3-8.5-10)
 - Should the Adult Guardianship Office issue any guidance to VASIA programs on fees?
 - Yes – bring back a copy for group to review
 - Fees could off-set the costs programs are accruing through the competitive grants
- Guardianship Code Revision Task Force
 - [Proposed in Senate Bill 71](#)
 - Does the Guardianship Committee have any concerns about this bill?
 - No – updates will be given in April to the group

VI. Upcoming Agenda Items

- Please email ideas to Nick Parker or Judge Bradley
- Reminder of 2026 Meeting Dates: April 17; July 17; October 16

Minutes Approved April 17, 2026

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I. Updates from OJA Staff

- Guardianship Oversight Task Force
 - Final report now published – Court Times article coming soon
 - Committee has been assigned several recommendations to work on:
 - 11 – standardized court order
 - Deciding on format – checkboxes, categories, etc.
 - Limited guardianship provisions
 - Effect and process for revocation of POA
 - *Note: a standard order was created but NOT included as an appendix – Nick will send this out once it is cleared with the GOTF*
 - 17 – guidelines for GALs in adult guardianship
 - Standard rules for minors – could adopt wholesale or make changes
 - Roles of minor and adult GALs inherently different (options for the protected person to receive support; inclusion of medical terminology and capacities; scope and duration of the GU)
 - 21 – review of emerging adult GU cases
 - Creating structure and defining scope of the review
 - Working with IAGO on funding (possibly for senior judges)
 - Inclusion in the benchbook and forms
 - 24 – sunset provision clauses
 - Defining when it would be used vs. when to avoid
 - Notifications created in Registry
 - Inclusion in the benchbook and forms
 - 26 – materials to financial/banking, education, and healthcare
 - Looks similar to the “brochures” we created in 2023, but with specific focus on these locations

II. Updates from Judicial Officers

- Reports of increased AI within guardianship filings across the state
 - Attorneys and pro se litigants
 - Encourage Education Division to let us include this in a fall session (or as a standalone non-guardianship session – how to deal with it; tips on pinpointing it; dealing and responding to it)
- Parent opposition to lifestyle choices of protected person
 - Case study – it became apparent that the decisions of protected person don’t align with parental values
 - GAL recommended mental health evaluations – waiting on results
 - Recommendations from group – get a new physician’s report and medical information (which may show that a guardianship is not even needed anymore)
- Issues with pro-se minor guardianships
 - Parties not understanding what they need to file with court

- Discussion on what to do when a guardian is accused/convicted of a crime
 - Has been occurring more often – people call IAGO and report that the guardian is facing charges
 - Is there a mechanism to get this reported to the court? – could be done through APS, ombudsmen (but it is not being done consistently)
 - Specific question could be asked on the biennial reporting forms – if they swear to it, they are locking it in if they lied
 - Could trigger a GAL inquiry
 - Could be a function of the Court Monitor programs in the future
 - Flag in Odyssey – similar to the proposed “PP” flag for protected adults?
 - Is there a quick way in Odyssey to flag an illicit guardian and show that they are facing an active criminal case? Seems more clear that this can be done when they have a warrant

III. Review of Cases, Trainings, and Resources

- Summer Symposium (June 25, 2026)
 - Agenda was sent out with materials for meeting
- Court/Clerk Symposium (July 7, 2026)
 - IOCS/IOCT presenting about the Guardianship Registry

IV. Action Items

- Benchbook Forms
 - Everyone is asked to look at the forms on InCite and send notes to Nick Parker about what is helpful vs. what needs to be updated
 - Please also send any forms you created and would like to share
- VASIA Court-Ordered Fees (IC 29-3-8.5-10)
 - Email vote was held – no objections and majority “yes” votes – motion passes
 - This language will be included during the next regularly-scheduled updates to the Trial Court manuals (starting in May 2026)

V. Upcoming Agenda Items

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- Reminder of 2026 Meeting Dates: July 17; October 16

Minutes Approved July 17, 2026