

EXECUTIVE DOCUMENT SUMMARY

Department: Probate/Family Court Contact Person: <u>Hon. Marian Kromkowski</u> Telephone No.: <u>231-256-9803</u>	Submittal Dates <input type="checkbox"/> Executive Board: _____ <input checked="" type="checkbox"/> Regular Session: <u>09/17/2019</u>
Source Selection Method <input type="checkbox"/> Select One <input checked="" type="checkbox"/> Other: <u>n/a</u>	VENDOR: _____ Address: _____ Phone: _____
Budgeted Amount: _____ Contracted Amount: _____	
Document Description	
<input type="checkbox"/> Select One <input checked="" type="checkbox"/> Other <u>Job Description revision</u>	
<input type="checkbox"/> Request to Waive Board Policy on Bid Requirements <p>Long-time County employee Probate Register Susan Richards is planning to retire soon.</p> <p>As part of the process in soliciting applications from qualified, interested individuals, there is a need to revise the current job description on file for the Probate Register position (see attached). Proposed changes are indicated in red and on the right hand margin of the job description.</p> <p>I am requesting the Board approve the revisions to the Probate Register job description as presented, and will be following up with a request to revise the Juvenile Register job description as well.</p> <p>An Executive Document Summary will be submitted in October for any ancillary requests associated with the new hire.</p> <p>Suggested Recommendation: Motion to approve the revisions to the Probate Register job description as presented.</p>	

Department Head Approval: Marian Kromkowski Date: 9/11/19

Late Addition #1

COUNTY OF LEELANAU JOB DESCRIPTION

PROBATE REGISTER

Supervised By: Probate and Family Court Judge
FLSA: Non-Exempt

General Summary:

Under the supervision of the Probate Judge, ~~the Probate Register maintains all probate, estate, guardianship, conservatorship, mental health, protective orders, civil actions ancillary to estates, secret marriages, and trust cases. Tasks include opening new files; reviewing filings and documentation for compliance with statutes and court rules; ensuring timely fiduciary filings of inventories, accounts, and reports; meeting with fiduciaries and attorneys to discuss problems in the cases; advising parties on appropriate procedures for mental commitments; and organizing all elements necessary to hold hearings.~~

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Essential Job Functions:

An employee in this position may be called upon to perform any or all of the following essential functions. These examples do not include all the duties which the employee may be expected to perform. An individual must be able to perform each essential function satisfactorily.

Deleted: manages and directs the operations of the Probate Court including caseload management and fiduciary support. Also prepares and coordinates hearing notices, court orders and other documents pertaining to child protective and adoption proceedings for the Family Division of Circuit Court. Provides information and direction to attorneys, agencies and the public related to necessary Probate procedures, ensuring compliance with statutes and court rules.

1. Manages and directs the daily administration of the Probate Court, making recommendations to the Probate Judge where appropriate.
2. Manages and maintains all probate, estate, guardianship, conservatorship, mental health, protective orders, civil actions ancillary to estates, secret marriages, and trust cases. Primary tasks involve opening new files; reviewing filings and documentation for compliance with statutes and court rules; ensuring timely fiduciary filings of inventories, accounts and reports; meeting with fiduciaries and attorneys to discuss problems in the cases; advising parties on appropriate procedures for mental commitments; and organizing all elements necessary to hold hearings.
3. Consults with attorneys, Department of Health and Human Services, Community Mental Health, and the public, giving direction on the probate and mental health codes, court rules and local court procedures for problems relating to court cases.
4. Performs quasi-judicial acts empowered by statutes and authorized by the Judge, such as informal probate administration, admission of wills and appointment of personal representatives. Processes small estates, and performs legal research for the Judge as requested.

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Deleted: <#>Manages child protective and adoption proceedings cases for the Family Division of Circuit Court. Primary tasks involve opening new files, reviewing documentation for compliance with Title IV-E funding requirements; preparing notices and orders, including emergency removal orders; receipt and distribution of confidential agency and other reports; and organizing all elements necessary to hold hearings. ¶

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5. Maintains Probate calendars, including scheduling hearings in accordance with Michigan Court Rule time requirements, coordinating schedules with counsel~~s~~ of record, and ensuring notice to interested persons.

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6. Appoints attorneys and/or guardians ad litem in cases of guardianship, conservatorship, as needed.

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7. Prepares forms and orders as the Probate Judge directs, including all emergency orders, ex-parte orders, and amended orders.

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8. Compiles and ensures completion of various reports required by the State Court Administrative Office involving caseload, appointed counsel, delinquent fiduciaries, jury fees and statistics, and other administrative reports.

9. Uses and maintains the Judicial Information Systems (JIS) computerized data and records management on the state-provided AS400 Computer System for all Probate cases.

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10. Compiles and maintains guardianship, conservatorship, estate and instruction packets for use by the public. Maintains web pages for Probate Court to provide information and resources to the public.

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11. Serves as backup office receptionist, including but not limited to answering the telephone, greeting the public, opening/distributing the mail, circulating inter-office communications, maintaining the office equipment, ordering office supplies as needed, reviewing billing statements and submitting to the Family Court Administrator for approval.

12. Keeps current with new Federal, State and local legislation; attends continuing education seminars, and reviews professional journals and manuals to ensure current and accurate knowledge of Michigan Supreme Court requirements.

13. Performs related work as required.

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Required Knowledge, Skills, Abilities and Minimum Qualifications:

The requirements listed below are representative of the knowledge, skills, abilities, and minimum qualifications necessary to perform the essential functions of the position. Reasonable accommodations may be made to enable individuals with disabilities to perform the job.

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Requirements include the following:

- One or two years of college or specialized training as a paralegal, or the equivalent.
- Three years' experience as a paralegal or specialized training in probate law and/or some probate experience.
- A valid Michigan vehicle operator's license
- A thorough knowledge of probate administration in order to process estates, facilitate admission of wills, appoint representation, and make recommendations as needed.
- Knowledge of court proceedings, procedures, requirements, and etiquette.
- Ability to establish effective working relationships and work cooperatively with other individuals and agencies within the county's probate system.
- Ability to critically assess situations, problem-solve, work effectively under stress, within deadlines, and changes in work priorities.
- Skill in responding to public inquiries and internal requests with a high degree of professionalism.
- Proficiency in the use of computers and word processing software, including but not limited to Microsoft Office software; Windows Media Player; AS400; Adobe Acrobat; internet pages and search engines, and Roxio Creator.
- Knowledge and ability to maintain accurate and complete records, as well as maintain confidentiality and use discretion when dealing with sensitive issues.
- Have or obtain current State of Michigan Notary Public certification.

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Physical Demands and Work Environment:

The physical demands and work environment characteristics described here are representative of those an employee encounters while performing the essential duties of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is regularly required to communicate with others in person and on the telephone. The employee frequently is required to review and produce written documents. The employee must regularly lift and/or move items of light weight and may occasionally lift and/or move items of moderate weight.

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While performing the duties of this job, the employee regularly works in a business office or courtroom setting. The noise level in the work environment is usually quiet to moderate.

Other Requirements:

Leelanau Courts are proud of their record serving the community. One must be able to work with people who are operating in financially and emotionally stressful situations, and must

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display appropriate decorum and professionalism with both attorneys and nonlawyer litigants. He/she must comply with the Michigan Rules of Professional Conduct and the Michigan Code of Conduct for Judicial Branch Employees. One must be able to work independently and also be a contributing team member in Leelanau Courts.

Employment is dependent on a background check, criminal history, and fingerprint check, along with any other relevant requirements of Leelanau County or Court Personnel Policies and must adhere to these policies once employed.

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