

TABLE OF CONTENTS

Acknowledgements	i
Working Group Members	ii
Professional Colleges.....	ii
INTRODUCTION	1
Overview	2
Guide Purpose.....	2
Guide Development and Changes.....	2
Guide Users	2
Guide Structure and Content	3
Electronic Version of Guide.....	4
Points to Note	4
Reference to Specific AGA and SPG Regulation	4
Best Practice.....	4
Acronyms	5
Legislation Referred to in this Guide	5
Who is involved?	6
Roles Formally Defined in the AGA and/or the SPG Regulation.....	6
Certificate of Incapability – Forms	8
Adult Guardianship Act Guiding Principles	10
Adult Guardianship Act Presumption of Capability	10
Capability and Decision Making	11
Financial Decision Making.....	11
Certificates of Incapability Should Only Be Issued as a Last Resort	12
If the Adult has a Committee of Estate	12
Legislative Framework	12
Patients Property Act	12
Adult Guardianship Act, Part 2.1	13
Note on Terminology – Committee of Estate and Statutory Property Guardian.....	13
Indian Act, Section 51.....	13
The Certificate of Incapability Process – Four Core Steps	15
PART I: DETERMINE THE NEED	17
Determination of Need	18
Referral and Investigation	18
Designated Agency and PGT Investigations	18
Investigation Outcomes	19
Beginning of the Certificate of Incapability Process.....	20

Emergency Provisions.....	20
PART II: ASSESSMENT	22
Principles to Guide the Assessment Process	24
Assessment Components	25
Coordination of the Assessment Components.....	25
Information to be Given before Assessment	26
The Purpose of the Assessment: The Test of Incapability.....	27
Assessment Process	28
Collateral Information.....	28
Support Persons	29
Use of Interpretation Services.....	29
Conducting the Assessment Without Full Participation of the Adult.....	29
Forms.....	30
Conducting the Medical Component	30
Six Month Requirement	30
The Medical Examination.....	31
Conducting the Functional Component	33
Preparing for the Interview.....	33
The Functional Component Interview(s).....	33
Factors in Demonstrating Understanding	34
Functional Component Assessment Form	34
On Completing the Assessment	35
PART III: HEALTH AUTHORITY DESIGNATE DECISION	38
The Role of the Health Authority Designate	39
Who is a “Health Authority Designate”?.....	39
How Are They Designated?.....	39
HAD Key Steps in the Certificate of Incapability Process.....	39
Step 1: Review HAD Information Package and Determine If Additional Information Is Required.....	39
Step 2: Apply and Consider Criteria Before Making a Decision to Issue a Certificate of Incapability	40
Step 3: Provide Notice of the Intention to Issue a Certificate of Incapability and Opportunity to Respond	41
Step 4: Decide Whether to Issue a Certificate of Incapability.....	44
PGT as Committee of Estate	45
When the Certificate is Issued.....	45
Effect on Power of Attorney or Representation Agreement.....	46
Communication	46
Powers and Duties of PGT as Committee of Estate.....	46
Fees and Expenses when Acting as Committee	46
PART IV: SECOND ASSESSMENT, REASSESSMENT, COURT REVIEW AND ENDING PGT AUTHORITY	48
Second Assessment and Reassessment	49
Second Assessment.....	49
Reassessments	49
Process and Role of the Health Authorities and PGT in Coordinating Second Assessment, and Reassessment Requested by the Adult.....	50

Court Review	52
Ending Authority of the PGT	52
PGT is Satisfied the Adult No Longer Needs A Statutory Property Guardian.....	52
Adult Is Capable of Managing Their Financial Affairs.....	53
Notice of Cancellation by the PGT.....	53
Ending Statutory Property Guardianship by Court Order	53
Death of the Adult.....	54
PART V COLLECTION AND DISCLOSURE OF INFORMATION AND RECORD KEEPING	55
Health Authority Information Management and Record Keeping	56
Relationship of FOIPPA to other Acts.....	56
AGA – Right to Information.....	56
AGA – Disclosing Information.....	57
Protecting the Identity of the Reporting Party.....	57
Health Authority Record Keeping.....	58
APPENDICES	59
Appendix A - Key Terms and Definitions	59
Appendix B - Options to Consider	62
When an Individual has Difficulties Managing Their Financial, Legal or Personal Affairs	62
Appendix C - Contact Information	64
Contact the PGT	64
Contact the Health Authorities	64
Appendix D - Legislation	
Adult Guardianship Act	
Statutory Property Guardianship Regulation	
Patients Property Act	
Appendix E - Forms	
Form Description and Intended Use	
Adult Information Sheet and Sample Script	
Medical Component of Assessment Form	
Functional Component of Assessment Form	
Details of Assessment	
HAD Information Package Cover Sheet	
HAD Checklist for Issuing a Certificate of Incapability	
HAD Notice of Intention to Issue a Certificate of Incapability	
Form 2 - Adult Guardianship Act Certificate of Incapability	
HAD's Concluding Letter to the Adult/Family	
HAD Acceptance of Determination of Capability	
Cancellation of Certificate of Incapability	

To obtain an electronic version of this Guide and the forms in Appendix E, visit the PGT Website at:

<http://www.trustee.bc.ca/reports-and-publications/Pages/certificate-of-incapability-guidelines.aspx>