



October 2018  
FLSA: EXEMPT  
CLASS CODE: 90537

## **SUPERIOR COURT INVESTIGATOR**

### **DEFINITION**

Under general direction, conducts investigations relating to conservatorship and guardianship petitions before the court; reviews ongoing probate conservatorships and accountings; consults with judicial officers, attorneys, petitioners and attends hearings, as necessary; prepares reports and makes recommendations to the court; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision or direction. Exercises no direct supervision over staff.

### **CLASS CHARACTERISTICS**

This is the full journey-level class in the Superior Court Investigations Division. Incumbents are responsible for performing investigative work of Probate conservatorship and guardianship cases as directed by the Superior Court and required by law.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS** (Illustrative Only)

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Reviews case information regarding probate guardianships and conservatorships, including pleadings, questionnaires, minute orders and other supporting documents; prioritizes, assesses and evaluates petitions as ordered by the Court.
- Conducts investigations in guardianship and conservatorship matters by gathering, assessing and evaluating information regarding living and housing arrangements, care plans, and other information concerning the personal health and safety of proposed wards and conservatees through interviews, home visits and other sanctioned investigative methods.
- Researches criminal history, gathers background information and reviews records related to the investigation.
- Prepares written reports as directed by the superior court and as required by law.
- Identifies issues and makes recommendations to the public, including attorneys and self-represented litigants, as needed to correct and/or address issues prior to court hearings.
- Stays abreast of current and proposed legislation regarding conservatorships and guardianships.

### **QUALIFICATIONS**

#### **Knowledge of:**

- Investigation techniques and procedures.
- Principles and practices related to fiduciary accounting.
- Legal terminology, documents and pleads relevant to case evaluation and processing.

- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures including California Probate Code, California Rules of Court, tax law, other California codes and court rules pertaining to conservatorships, guardianships, and other probate matters.
- Issues of child abuse or abandonment, elder abuse and substance abuse.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.

**Ability to:**

- Understand, interpret and apply provisions of statutes, rules, law and policies to probate proceedings, including conservatorships and guardianships.
- Perform a variety of complex document and case analysis and effectively communicate findings both orally and in writing.
- Prepare comprehensive and concise reports and recommendations related to conservatorships and guardianships.
- Work independently and prioritize work with excellent organizational skills.
- Maintain confidential information in accordance with legal standards and/or other regulations.
- Effectively communicate with and interview individuals who may be distraught or under emotional strain.
- Elicit medical, personal and financial information from individuals, their families, friends, public and private agencies and others.
- Exercise considerable initiative, analyze data and draw valid conclusions under conditions requiring tact and good judgment.
- Effectively arbitrate solutions to problems arising from conservatorships and guardianships.
- Establish and maintain accurate records and reports.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to a bachelor's degree from an accredited college or university in social sciences or a related field and two (2) years of experience in litigation, law enforcement, social service, probate or probation investigative work.

**Licenses and Certifications:**

- Possession of and ability to maintain a valid California Driver's License.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to interview and investigate outside of the office; to operate a motor vehicle; vision to read printed materials and a computer screen, and conduct investigations; and hearing and speech to communicate in person and over the telephone. This is partially a sedentary office and partially a field operations classification; frequent standing and walking between work areas is required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this

classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds with the use of proper equipment.

**ENVIRONMENTAL ELEMENTS**

Employees work partially in an office environment with moderate noise levels and controlled temperature conditions, and partially in the field and are occasionally exposed to loud noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, and hazardous physical substances and fumes. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.