My Title

Process: reviewing drafted guardianship renewal documents  
  
I use VBA in Excel to merge data in an excel file into template word documents. The VBA populates a folder with 15 different word documents.  
After the documents are merged, I begin reviewing and editing each document. Each of the following documents needs to be reviewed and edited.  
  
For the Notice of hearing document â€“ I ensure that the court will have a hearing, if that court does not hold hearings, I change the hearing document into a notice of presentation document. I format the document so that there is spacing between topics I am asking the court to address. I remove extra unused sections from address part of the document.   
  
For the Declaration of mailing document - I format the document so that there is spacing between topics I am asking the court to address. I remove extra spaces from address part of the document. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page. Add my signature and a mailing date to the document.  
  
For the Disclosure of Guardian - I input information into each question based on what the Guardian told me. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
  
For the Acceptance of Guardian - I then format the document so that there is spacing.  
  
For the Motion to approve the Report - I ensure that all in the information in the document is accurate. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
For the Report â€“ I ensure that all information merged into the document is accurate. In put any information I have drafted regarding the person. format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
  
For the Personal Care Plan â€“ I ensure that all information merged into the document is accurate. I add any relevant information from the personal information that was put into the report. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.  
  
For the Inventory - I ensure that all information merged into the document is accurate. I add any relevant information from the financial information that was put into the report. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
  
For the Sealed medical documents â€“ I format the court to list to include where the included documents are from.   
  
For the Sealed financial documents â€“ I format the court to list to include where the included documents are from. PDF the document and merge in the financial documents I want the court to have.   
  
For the Sealed telephone documents â€“ I format the court chart to include all interested parties and list their phone numbers.   
  
For the Declaration of Guardian â€“ I draft up a statement for the guardian regarding what the guardian has done for the person, I format the document so that it looks good, and so that there is a part of the main document on the signature page.  
  
For the Declaration of Attorney Fees â€“ I format the document so that it looks good, and so that there is a part of the main document on the signature page.   
  
For the Order approving the report - I ensure that all information merged into the document is accurate. I add any relevant information based on the documentâ€™s questions. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
  
For the Order approving the Plan - I ensure that all information merged into the document is accurate. I add any relevant information based on the documentâ€™s questions, including the planned expenditures from the Report and the Plan. I format the document so that there is spacing between sections, and so that there is a part of the main document on the signature page.   
  
Finally, I draft a cover letter to the interested parties giving them information on the guardianship renewal â€“ when, where and the documents being mailed.   
  
Attorneyâ€™s file system:  
Attorney uses Microsoft explorer files to organize cases. Each case folder is named â€“ LAST NAME.First name and renewal date. Within each folder there are other folders, including but not limited to â€“ Correspondence, Old Court Docs, 2021 Renewal Docs, 2021 Renewal, UGA Case Merger Docs â€“ and more.  
Documents within each folder are inconsistently named â€“ sometimes by document type, and other times by date then document type, and other times by the document number in the case merger system.  
  
The most important part of this process, and the part to automate with AI agents, is the reviewing and editing. For each word document created by the Excel Merge (VBA code), it needs to be compared to an example document, and reviewed for errors. Any errors or formatting need to be fixed. You do not need to generate documents. The primary tools you create must Use GPT to compare a word document to an example template word file, identify any errors based on data in the excel merge spreadsheet and then fix any errors in the original word document.