

1 ENGROSSED HOUSE
2 BILL NO. 3667

By: Miller, Cantrell, and
Provenzano of the House

3 and

4 Gollihare of the Senate

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6
7 [guardian and ward - training for applicants for
8 guardian - verification or attestation document -
9 training requirements - Department of Human
10 Services - list - programs - effective date]
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13 BE IT ENACTED BY THE PEOPLE OF THE STATE OF OKLAHOMA:

14 SECTION 1. AMENDATORY 30 O.S. 2021, Section 1-114, is
15 amended to read as follows:

16 Section 1-114. A. In all cases the court making the
17 appointment of a guardian has exclusive jurisdiction to control such
18 guardian in the management and disposition of the person and
19 property of the ward.

20 B. The court has jurisdiction over guardianship proceedings,
21 and has the following powers, which must be exercised in the manner
22 prescribed by statute, to:

23 1. Appoint and remove guardians for minors and for
24 incapacitated and partially incapacitated persons;

1 2. Compel any applicant for guardian over a proposed ward who
2 suffers from neurological conditions, such as Alzheimer's disease,
3 dementia, or similar developmental disabilities, to complete
4 prerequisite training unless waived by the court;

5 3. Issue and revoke letters of guardianship;

6 ~~3.~~ 4. Control the conduct of guardians with regard to the care
7 and treatment provided to their wards;

8 ~~4.~~ 5. Control the conduct of guardians with regard to the
9 management of the financial resources of their wards, including but
10 not limited to the power to:

11 a. compel guardians to submit plans, reports, inventories
12 and accountings to the court,

13 b. compel payment and delivery by guardians of property
14 belonging to their wards,

15 c. order the payment of debts, the sale of property, and
16 order and regulate the distribution of property which
17 has been placed under the control or management of a
18 guardian, and

19 d. settle the accounts of guardians;

20 ~~5.~~ 6. Appoint appraisers of the property of wards;

21 ~~6.~~ 7. Compel the attendance of witnesses and the production of
22 documents and property;

23 ~~7.~~ 8. After a petition has been filed for appointment of a
24 guardian for a minor, make or modify any temporary order of

1 guardianship during the progress of the proceedings that would be in
2 the best interest of the ward. Any such temporary order may be
3 entered ex parte with written notice sent to all parties directing
4 them to appear before the court, at a time and place therein
5 specified, not more than twenty (20) days from the time of making
6 such order, to show cause why the order should not be granted for
7 temporary guardianship; and

8 ~~8.~~ 9. Exercise all powers conferred by the Oklahoma
9 Guardianship and Conservatorship Act, Section 1-101 et seq. of this
10 title, and to make such orders as may be necessary for the exercise
11 of said powers.

12 C. The chief judge of each district court shall establish by
13 court rule a system for:

14 1. The filing of guardianship and conservatorship cases and
15 records which distinguish them from probate cases; and

16 2. Monitoring the filing of annual reports and inventories
17 required by this title for the purpose of assuring that the court
18 will be notified of annual reports as they fall due and whether or
19 not said reports are filed.

20 SECTION 2. AMENDATORY 30 O.S. 2021, Section 3-104, is
21 amended to read as follows:

22 Section 3-104. A. The following priorities shall guide the
23 selection by the court of a guardian or limited guardian of an
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1 incapacitated or partially incapacitated person from among those
2 eligible:

3 1. The individual or individuals nominated by the subject of
4 the proceeding pursuant to Section 3-102 of this title;

5 2. The current guardian or limited guardian appointed or
6 recognized by the appropriate court of any other jurisdiction in
7 which the incapacitated or partially incapacitated person resides;

8 3. An individual nominated by the will or by other writing of a
9 deceased parent, spouse, or an adult child who was serving as the
10 guardian or limited guardian of the subject of the proceeding;

11 4. The spouse of the subject of the proceeding;

12 5. An adult child of the subject of the proceeding;

13 6. A parent of the subject of the proceeding;

14 7. A sibling of the subject of the proceeding;

15 8. Any individual approved by the court with whom the subject
16 of the proceeding has been living for more than six (6) months prior
17 to the filing of the petition. Provided that any owner, operator,
18 administrator or employee of a facility subject to the provisions of
19 the Nursing Home Care Act, the Residential Home Care Act or the
20 Group Homes for the Developmentally Disabled or Physically
21 Handicapped Persons Act shall not be appointed guardian or limited
22 guardian of a resident of such facility unless the owner, operator,
23 administrator or employee is the spouse of the resident, or a
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1 relative of the resident within the second degree of consanguinity
2 and is otherwise eligible for appointment; or

3 9. If applicable, an individual volunteer qualified for
4 appointment as a guardian of a veteran pursuant to the Veterans
5 Volunteer Guardianship Act.

6 B. When the guardian or limited guardian of an incapacitated or
7 partially incapacitated person is the guardian of property only, the
8 court may appoint an organization which is eligible to manage the
9 financial resources of an individual and has fiduciary powers, or
10 its successor in interest, when:

11 1. Such organization is nominated by the subject of the
12 proceeding pursuant to Section 3-102 of this title;

13 2. Such organization is nominated by a person eligible to make
14 such nomination pursuant to Section 3-103 of this title; or

15 3. The appointment of such organization is in the best interest
16 of the subject of the proceeding.

17 C. The court shall make reasonable inquiry to determine whether
18 the person or organization proposed to serve as the guardian or
19 limited guardian of an incapacitated or partially incapacitated
20 person is suitable and will exercise the powers and carry out the
21 duties and responsibilities of guardian or limited guardian in the
22 best interest of the ward. For any guardianship which the court
23 orders the guardian to complete prerequisite training, pursuant to
24 Section 1-114 of this title, the court shall require verification or

1 attestation of completion of prerequisite training specific to the
2 needs of the ward to be filed in the case or submitted to the court
3 prior to appointment of the guardian. The court shall also inquire
4 of the proposed guardian of the person of the ward as to how the
5 guardian proposes to provide for the care of the ward, and of the
6 proposed guardian of the estate of the ward as to how the guardian
7 proposes to manage the property of the ward and to provide for the
8 ward's financial care. The court shall make such orders with
9 respect thereto as the court deems to be for the best interest of
10 the ward.

11 D. A public agency shall not be appointed to serve as guardian
12 for an adult except as provided in Section 1415 of Title 10 and
13 Section 10-108 of Title 43A of the Oklahoma Statutes.

14 SECTION 3. AMENDATORY 30 O.S. 2021, Section 3-111, is
15 amended to read as follows:

16 Section 3-111. A. At the hearing on the petition the court
17 shall determine whether or not it is necessary to appoint a guardian
18 of the person, property or both. If a guardian is needed, the court
19 shall determine:

20 1. When a general or limited guardian of the person of the
21 subject of the proceeding is requested, the essential requirements
22 for the health and safety of the subject of the proceeding and the
23 skills and knowledge necessary to meet those requirements;

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1 2. When a general or limited guardian of the property of the
2 subject of the proceeding is requested, the type and amount of the
3 financial resources of the subject of the proceeding, the essential
4 requirements for managing the financial resources and the skills and
5 knowledge necessary to manage the financial resources;

6 3. The nature and extent of the incapacity of the subject of
7 the proceeding, if any; and

8 4. Whether by clear and convincing evidence the subject of the
9 proceeding is an incapacitated or partially incapacitated person.

10 B. If after a full hearing and examination upon such petition,
11 the court finds by clear and convincing evidence that the subject of
12 the proceeding is an incapacitated or partially incapacitated
13 person, the court shall determine the extent of the incapacity and
14 the feasibility of less restrictive alternatives to guardianship to
15 meet the needs of the subject of the proceeding. Upon such
16 determination, the court may:

17 1. Dismiss the action if the court finds that less restrictive
18 alternatives to guardianship are feasible and adequate to meet the
19 needs of the subject of the proceeding; or

20 2. Appoint a guardian or limited guardian who has completed any
21 prerequisite training, pursuant to Section 1-114 of this title,
22 specific to the needs of the ward, unless waived by the court. An
23 order making such an appointment shall include a specific finding
24 that it was established by clear and convincing evidence that the

1 identified needs of the subject of the proceeding require a
2 guardianship instead of less restrictive alternatives.

3 C. Guardianship for an incapacitated person shall be:

4 1. Used only as is necessary to promote and protect the well-
5 being of the person and his or her property;

6 2. Designed to encourage the development of maximum self-
7 reliance and independence of the person; and

8 3. Ordered only to the extent required by the actual mental,
9 physical and adaptive limitations of the person.

10 SECTION 4. AMENDATORY 30 O.S. 2021, Section 3-112, is
11 amended to read as follows:

12 Section 3-112. A. Whenever the court finds the subject of the
13 proceeding to be an incapacitated person the court shall appoint:

14 1. A general guardian of the person; and

15 2. As the court determines to be necessary and appropriate, a
16 guardian of the property of the ward.

17 B. Whenever the court finds the subject of the proceeding to be
18 a partially incapacitated person the court shall appoint, as
19 necessary and appropriate for said person:

20 1. A limited guardian of the person; or

21 2. A general or a limited guardian of the property of said
22 person; or

23 3. A limited guardian of the person and a general or limited
24 guardian of the property of said person.

1 C. The court may appoint the same or separate persons to serve
2 as guardian or limited guardian of the person and guardian or
3 limited guardian of the property of a ward.

4 D. Any person who is to serve as a guardian or limited guardian
5 of the person or the property of a ward whom the court finds to be
6 an incapacitated or partially incapacitated adult by reason of
7 Alzheimer's disease, dementia, or similar developmental disabilities
8 must submit verification or attestation of completion of training
9 specific to assisting persons with Alzheimer's disease, dementia, or
10 similar neurological conditions including, but not limited to,
11 understanding Alzheimer's disease, communication techniques, and
12 resources available for the ward's care if the ward is over the age
13 of sixty (60), or earlier if the ward is diagnosed with such
14 condition, prior to appointment.

15 E. A list of approved training programs will be maintained by
16 the Department of Human Services. Programs not included on the list
17 shall be submitted for approval to the Department of Human Services
18 prior to guardianship determination.

19 SECTION 5. This act shall become effective November 1, 2024.
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1 Passed the House of Representatives the 4th day of March, 2024.

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4 Presiding Officer of the House
5 of Representatives

6 Passed the Senate the ____ day of _____, 2024.

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9 Presiding Officer of the Senate