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**HOUSE BILL NO. 1260**

Offered January 20, 2022

A *BILL to amend and reenact §§ 64.2009 and 64.2-2019 of the Code of Virginia and to amend the Code of Virginia by adding a section numbered 64.2-2019.1, relating to guardianship; restricted communication procedures.*

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 Patron—Roem
 

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Committee Referral Pending

**Be it enacted by the General Assembly of Virginia:**

**1. That §§ 64.2-2009 and 64.2-2019 of the Code of Virginia are amended and reenacted and that the Code of Virginia is amended by adding a section numbered 64.2-2019.1 as follows:**

**§ 64.2-2009. Court order of appointment; limited guardianships and conservatorships.**

A. The court's order appointing a guardian or conservator shall (i) state the nature and extent of the person's incapacity; (ii) define the powers and duties of the guardian or conservator so as to permit the incapacitated person to care for himself and manage property to the extent he is capable; (iii) specify whether the appointment of a guardian or conservator is limited to a specified length of time, as the court in its discretion may determine; (iv) specify the legal disabilities, if any, of the person in connection with the finding of incapacity, including but not limited to mental competency for purposes of Article II, Section 1 of the Constitution of Virginia or Title 24.2; (v) include any limitations deemed appropriate following consideration of the factors specified in § 64.2-2007; (vi) set the bond of the guardian and the bond and surety, if any, of the conservator; and (vii) where a petition is brought prior to the incapacitated person's eighteenth birthday, pursuant to subsection C of § 64.2-2001, whether the order shall take effect immediately upon entry or on the incapacitated person's eighteenth birthday.

B. The court may appoint a limited guardian for an incapacitated person who is capable of addressing some of the essential requirements for his care for the limited purpose of medical decision making, decisions about place of residency, or other specific decisions regarding his personal affairs. The court may appoint a limited conservator for an incapacitated person who is capable of managing some of his property and financial affairs for limited purposes that are specified in the order.

C. Unless the guardian has a professional relationship with the incapacitated person or is employed by or affiliated with a facility where the person resides, the court's order may authorize the guardian to consent to the admission of the person to a facility pursuant to § 37.2-805.1, upon finding by clear and convincing evidence that (i) the person has severe and persistent mental illness that significantly impairs the person's capacity to exercise judgment or self-control, as confirmed by the evaluation of a licensed psychiatrist; (ii) such condition is unlikely to improve in the foreseeable future; and (iii) the guardian has formulated a plan for providing ongoing treatment of the person's illness in the least restrictive setting suitable for the person's condition.

D. A guardian need not be appointed for a person who has appointed an agent under an advance directive executed in accordance with the provisions of Article 8 (§ 54.1-2981 et seq.) of Chapter 29 of Title 54.1, unless the court determines that the agent is not acting in accordance with the wishes of the principal or there is a need for decision making outside the purview of the advance directive.

A conservator need not be appointed for a person (i) who has appointed an agent under a durable power of attorney, unless the court determines pursuant to the Uniform Power of Attorney Act (§ 64.2-1600 et seq.) that the agent is not acting in the best interests of the principal or there is a need for decision making outside the purview of the durable power of attorney or (ii) whose only or major source of income is from the Social Security Administration or other government program and who has a representative payee.

E. All orders appointing a guardian shall include the following statements in conspicuous bold print in at least 14-point type:

"1. Pursuant to § 64.2-2009 of the Code of Virginia, \_\_\_\_\_ (name of guardian), is hereby appointed as guardian of \_\_\_\_\_ (name of respondent) with all duties and powers granted to a guardian pursuant to § 64.2-2019 of the Code of Virginia, including but not limited to: (enter a statement of the rights removed and retained, if any, at the time of appointment; whether the appointment of a guardian is a full guardianship, public guardianship pursuant to § 64.2-2010 of the Code of Virginia, limited guardianship pursuant to § 64.2-2009 of the Code of Virginia, or temporary guardianship; and the duration of the appointment).

2. Pursuant to the provisions of subsection E of § 64.2-2019 of the Code of Virginia, a guardian, to the extent possible, shall encourage the incapacitated person to participate in decisions, shall consider the

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59 expressed desires and personal values of the incapacitated person to the extent known, and shall not  
60 ~~unreasonably~~ restrict an incapacitated person's ability to communicate with, visit, or interact with other  
61 persons with whom the incapacitated person has an established relationship *unless such restriction is*  
62 *reasonable to prevent physical, mental, or emotional harm to or financial exploitation of such*  
63 *incapacitated person. Such restrictions shall only be imposed pursuant to § 64.2-2019.1 of the Code of*  
64 *Virginia.*

65 3. Pursuant to § 64.2-2020 of the Code of Virginia, an annual report shall be filed by the guardian  
66 with the local department of social services for the jurisdiction where the incapacitated person resides.

67 4. Pursuant to § 64.2-2012 of the Code of Virginia, all guardianship orders are subject to petition for  
68 restoration of the incapacitated person to capacity; modification of the type of appointment or areas of  
69 protection, management, or assistance granted; or termination of the guardianship."

70 **§ 64.2-2019. Duties and powers of guardian.**

71 A. A guardian stands in a fiduciary relationship to the incapacitated person for whom he was  
72 appointed guardian and may be held personally liable for a breach of any fiduciary duty to the  
73 incapacitated person. A guardian shall not be liable for the acts of the incapacitated person unless the  
74 guardian is personally negligent. A guardian shall not be required to expend personal funds on behalf of  
75 the incapacitated person.

76 B. A guardian's duties and authority shall not extend to decisions addressed in a valid advance  
77 directive or durable power of attorney previously executed by the incapacitated person. A guardian may  
78 seek court authorization to revoke, suspend, or otherwise modify a durable power of attorney, as  
79 provided by the Uniform Power of Attorney Act (§ 64.2-1600 et seq.). Notwithstanding the provisions of  
80 the Health Care Decisions Act (§ 54.1-2981 et seq.) and in accordance with the procedures of  
81 § 64.2-2012, a guardian may seek court authorization to modify the designation of an agent under an  
82 advance directive, but the modification shall not in any way affect the incapacitated person's directives  
83 concerning the provision or refusal of specific medical treatments or procedures.

84 C. A guardian shall maintain sufficient contact with the incapacitated person to know of his  
85 capabilities, limitations, needs, and opportunities. The guardian shall visit the incapacitated person as  
86 often as necessary.

87 D. A guardian shall be required to seek prior court authorization to change the incapacitated person's  
88 residence to another state, to terminate or consent to a termination of the person's parental rights, or to  
89 initiate a change in the person's marital status.

90 E. A guardian shall, to the extent feasible, encourage the incapacitated person to participate in  
91 decisions, to act on his own behalf, and to develop or regain the capacity to manage personal affairs. A  
92 guardian, in making decisions, shall consider the expressed desires and personal values of the  
93 incapacitated person to the extent known and shall otherwise act in the incapacitated person's best  
94 interest and exercise reasonable care, diligence, and prudence. A guardian shall not ~~unreasonably~~ restrict  
95 an incapacitated person's ability to communicate with, visit, or interact with other persons with whom  
96 the incapacitated person has an established relationship, *unless such restriction is reasonable to prevent*  
97 *physical, mental, or emotional harm to or financial exploitation of such incapacitated person. Such*  
98 *restrictions shall only be imposed pursuant to § 64.2-2019.1.*

99 F. A guardian shall have authority to make arrangements for the funeral and disposition of remains,  
100 including cremation, interment, entombment, memorialization, inurnment, or scattering of the cremains,  
101 or some combination thereof, if the guardian is not aware of any person that has been otherwise  
102 designated to make such arrangements as set forth in § 54.1-2825. A guardian shall have authority to  
103 make arrangements for the funeral and disposition of remains after the death of an incapacitated person  
104 if, after the guardian has made a good faith effort to locate the next of kin of the incapacitated person to  
105 determine if the next of kin wishes to make such arrangements, the next of kin does not wish to make  
106 the arrangements or the next of kin cannot be located. Good faith effort shall include contacting the next  
107 of kin identified in the petition for appointment of a guardian. The funeral service licensee, funeral  
108 service establishment, registered crematory, cemetery, cemetery operator, or guardian shall be immune  
109 from civil liability for any act, decision, or omission resulting from acceptance of any dead body for  
110 burial, cremation, or other disposition when the provisions of this section are met, unless such acts,  
111 decisions, or omissions resulted from bad faith or malicious intent.

112 **§ 64.2-2019.1. Procedures to restrict communication, visitation, or interaction.**

113 A. A guardian may restrict an incapacitated person's ability to communicate with, visit, or interact  
114 with other persons with whom the incapacitated person has an established relationship only when such  
115 restriction is reasonable to prevent physical, mental, or emotional harm to or financial exploitation of  
116 such person. Any such restrictions imposed shall be the least restrictive means possible to prevent any  
117 such harm or exploitation.

118 B. The guardian shall provide written notice to the restricted person, on a form developed by the  
119 Office of the Executive Secretary of the Supreme Court of Virginia, stating (i) the nature and terms of  
120 the restriction, (ii) the reasons why the guardian believes the restriction is necessary, and (iii) how the

restricted person may challenge such restriction in court. The guardian shall inform the incapacitated person of such restriction, unless the guardian has a good faith belief that such information would be detrimental to the health or safety of such incapacitated person and shall forward a copy of such written notice to the local department of social services of the jurisdiction where the incapacitated person resides.

C. Any restricted person, by means of the form described in subsection B or by separate motion, may move to terminate or modify any such restriction. A hearing held pursuant to this subsection shall be held within 45 days of return of such form to the court or filing of such motion with the court.

D. If the court finds that a restriction is reasonable to prevent physical, mental, or emotional harm to or financial exploitation of such incapacitated person, the court may continue or modify such restriction in its discretion.

E. If the court does not find that a restriction is reasonable to prevent, physical, mental, or emotional harm to or financial exploitation of such incapacitated person, the court may issue an order terminating, continuing, or modifying any restriction the guardian imposed on the person challenging such restriction.

F. If the court finds that a guardian imposed restrictions or filed a motion under this section in bad faith, primarily for the purposes of harassment, or clearly frivolous or vexatious, the court may require the guardian to pay or reimburse the restricted person all or some of the costs and fees, including attorney fees, incurred by the restricted person in connection with such motion.

G. If the court finds that the claim of a restricted person who filed a motion pursuant to this section was brought in bad faith, primarily for the purposes of harassment, or clearly frivolous or vexatious, the court may require such restricted person to pay or reimburse the guardian all of some of the costs and fees, including attorney fees, incurred by the guardian in connection with such motion.

H. Any order issued pursuant to subsections D, E, or F shall be forwarded to the incapacitated person subject to the guardianship and the local department of social services of the jurisdiction where the incapacitated person resides.