By: Zaffirini (Thompson of Harris)

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A BILL TO BE ENTITLED

1	AN ACT
2	relating to the establishment by a county of public guardians for
3	certain incapacitated persons and funding for guardianships by
4	public guardians and related services.
5	BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF TEXAS:
6	SECTION 1. Chapter 1002, Estates Code, is amended by adding
7	Sections 1002.0215 and 1002.0265 to read as follows:
8	Sec. 1002.0215. OFFICE OF PUBLIC GUARDIAN. "Office of
9	public guardian" means an office of public guardian established by
10	the commissioners court of a county under Subchapter G-1, Chapter
11	<u>1104.</u>
12	Sec. 1002.0265. PUBLIC GUARDIAN. "Public guardian" means a
13	person:
14	(1) appointed to administer an office of public
15	guardian by the commissioners court of a county under Subchapter
16	<u>G-1, Chapter 1104; or</u>
17	(2) with which one or more counties enter into an
18	agreement under Section 1104.327(a)(2) or (d).
19	SECTION 2. Section 1104.251(a), Estates Code, is amended to
20	read as follows:
21	(a) An individual must be certified under Subchapter C,
22	Chapter 155, Government Code, if the individual:
23	(1) is a private professional guardian;
24	(2) will represent the interests of a ward as a

1 guardian on behalf of a private professional guardian;

2 (3) is providing guardianship services to a ward of a
3 guardianship program on the program's behalf, except as provided by
4 Section 1104.254; [or]

5 (4) is an employee of the <u>Health and Human Services</u>
6 <u>Commission</u> [Department of Aging and Disability Services] providing
7 guardianship services to a ward of the <u>commission;</u>

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(5) is a public guardian; or

9 (6) will represent the interests of a ward as a 10 guardian on behalf of a public guardian [department].

SECTION 3. Chapter 1104, Estates Code, is amended by adding Subchapter G-1 to read as follows:

SUBCHAPTER G-1. PUBLIC GUARDIANS

Sec. 1104.326. DEFINITION. In this subchapter, unless the context otherwise requires, "office" means an office of public guardian established under this subchapter.

17Sec. 1104.327. ESTABLISHMENT OF OFFICES; PUBLIC GUARDIANS.18(a) The commissioners court of a county by order may:

19 <u>(1) create an office of public guardian to provide</u> 20 <u>guardianship services described by Section 1104.334 to</u> 21 incapacitated persons; or

(2) enter into an agreement with a person operating a nonprofit guardianship program or private professional guardianship program located in the county or in an adjacent county to act as a public guardian by providing guardianship services described by Section 1104.334 to incapacitated persons.

27 (b) Subject to Subsection (c) and Section 1104.328, the

commissioners court of a county shall appoint an individual as 1 2 public guardian to administer the office of public guardian established under Subsection (a)(1) and may employ or authorize the 3 4 public guardian to employ personnel necessary to perform the duties of the office, including personnel who will represent the interests 5 of a ward as a guardian on behalf of the office if approved by the 6 7 commissioners court. (c) The commissioners court of a county may enter into an 8 9 agreement with an individual to act as public guardian under Subsection (b) on a part-time basis with appropriate compensation 10 11 if: (1) the commissioners court determines a full-time 12 13 appointment does not serve the needs of the county; and (2) the individual who is appointed on a part-time 14 basis is not employed in or does not hold another position that 15 presents a conflict of interest. 16 (d) The commissioners courts of two or more counties may 17 collectively enter into an agreement: 18 19 (1) to create and fund an office of public guardian for 20 purposes of Subsection (a)(1) and to appoint the same individual as public guardian to that office under Subsection (b); or 21 (2) with a person operating a guardianship program 22 described by Subsection (a)(2) to serve as a public guardian for 23 24 purposes of that subdivision. 25 (e) An individual appointed as public guardian under Subsection (b) serves a term of five years. 26 27 Sec. 1104.328. QUALIFICATIONS OF PUBLIC GUARDIAN. To be

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1	appointed as public guardian under Section 1104.327(b), an
2	individual must:
3	(1) be a licensed attorney or be certified under
4	Subchapter C, Chapter 155, Government Code; and
5	(2) have demonstrable guardianship experience.
6	Sec. 1104.329. CONFLICT OF INTEREST. (a) Except as
7	provided by Subsection (b), an office or public guardian must be
8	independent from providers of services to wards and proposed wards
9	and may not directly provide housing, medical, legal, or other
10	direct, non-surrogate decision-making services to a ward or
11	proposed ward, unless approved by the court.
12	(b) An office or public guardian may provide money
13	management services described by Section 531.125, Government Code,
14	or other representative payee services to a ward or proposed ward.
15	Sec. 1104.330. COMPENSATION. A person appointed or acting
16	as public guardian under Section 1104.327 shall receive
17	compensation as set by the commissioners court and is not entitled
18	to compensation under Subchapter A, Chapter 1155, unless approved
19	by the court or the person is appointed as guardian of a ward in
20	accordance with Section 1104.334(a)(2)(B).
21	Sec. 1104.331. BOND REQUIREMENT. (a) A public guardian
22	shall file with the court clerk a general bond in an amount fixed by
23	the commissioners court payable to the county and issued by a surety
24	company approved by the county judge. The bond must be conditioned
25	on the faithful performance by the person of the person's duties

and, if the public guardian administers an office, the office's duties.

1 (b) The bond required by this section satisfies any bond required under Chapter 1105. 2 Sec. 1104.332. VACANCY. If an individual appointed as 3 4 public guardian under Section 1104.327(b) vacates the position, the commissioners court shall appoint, subject to Section 1104.328, an 5 individual to serve as public guardian for the unexpired term. 6 7 Sec. 1104.333. POWERS AND DUTIES. (a) An office or public guardian shall: 8 9 (1) if applicable, evaluate the financial status of a proposed ward to determine whether the proposed ward is eligible to 10 11 have the office or public guardian appointed guardian of the ward under Section 1104.334(a)(2)(A); and 12 13 (2) serve as guardian of the person or of the estate of a ward, or both, on appointment by a court in accordance with the 14 requirements of this title. 15 16 (b) In connection with a financial evaluation under Subsection (a)(1) and on the request of an office or public 17 guardian, a court with jurisdiction over the guardianship 18 proceeding may order the release of public and private records, 19 including otherwise confidential records, to the office or public 20 21 guardian. 22 (c) Notwithstanding Section 552.261, Government Code, a state agency may not charge an office or public guardian for 23 providing the office or public guardian with a copy of public 24 information requested from the agency by the office or public 25 26 guardian. 27 Sec. 1104.334. APPOINTMENT OF OFFICE OR PUBLIC GUARDIAN AS

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1	GUARDIAN. (a) In accordance with applicable law, including
2	Subchapter C, Chapter 1101, a court may appoint an office or public
3	guardian to serve as guardian of the person or of the estate of a
4	ward, or both, if:
5	(1) on the date the guardianship application is filed,
6	the ward resides in or is located in the county served by the office
7	or public guardian; and
8	(2) the court finds that the ward:
9	(A) does not have sufficient assets or other
10	resources to pay a private professional guardian to serve as the
11	ward's guardian and the appointment is in the ward's best interest;
12	or
13	(B) has sufficient assets or other resources to
14	pay a private professional guardian to serve as the ward's
15	guardian, the appointment is in the ward's best interest, and:
16	(i) the ward's family members who are
17	eligible for appointment as the ward's guardian agree to the
18	appointment of an office or public guardian to serve as the ward's
19	guardian or are unable to agree on the person or persons that should
20	be appointed as the ward's guardian; or
21	(ii) the ward does not have a family member,
22	friend, or other suitable person willing and able to serve as the
23	ward's guardian.
24	(b) For purposes of Subsection (a)(2), the determination of
25	a ward's ability to pay a private professional guardian is
26	dependent on:
27	(1) the nature, extent, and liquidity of the ward's

1	<u>assets;</u>
2	(2) the ward's disposable net income, including income
3	of a recipient of medical assistance that is used to pay expenses
4	under Section 1155.202(a);
5	(3) the nature of the guardianship;
6	(4) the type, duration, and complexity of services
7	required by the ward; and
8	(5) additional, foreseeable expenses.
9	(c) The number of appointments of an office under this
10	section may not exceed 35 wards for each guardian representing the
11	interests of wards on behalf of the office.
12	(d) If each guardian representing the interests of wards on
13	behalf of an office reaches the limitation provided by Subsection
14	(c), the office shall immediately give notice to the courts.
15	Sec. 1104.335. CONFIDENTIALITY AND DISCLOSURE OF
16	INFORMATION. (a) All files, reports, records, communications, or
17	working papers used or developed by an office or public guardian in
18	the performance of duties relating to a financial evaluation under
19	Section 1104.333(a)(1) or the provision of guardianship services
20	are confidential and not subject to disclosure under Chapter 552,
21	Government Code.
22	(b) Confidential information may be disclosed only for a
23	purpose consistent with this subchapter, as required by other state
24	or federal law, or as necessary to enable an office or public
25	guardian to exercise the powers and duties as guardian of the person
26	or of the estate of a ward, or both.
27	(c) A court on its own motion or on the motion of an

1	interested person may order disclosure of confidential information
2	only if:
3	(1) a hearing on the motion is conducted;
4	(2) notice of the hearing is served on the office or
5	public guardian and each interested person; and
6	(3) the court determines after the hearing and an in
7	camera review of the information that disclosure is essential to
8	the administration of justice and will not endanger the life or
9	safety of any individual who:
10	(A) is being assessed for guardianship services;
11	(B) is a ward of the office or public guardian; or
12	(C) provides services to a ward of the office or
13	public guardian.
14	(d) The Office of Court Administration of the Texas Judicial
15	System shall establish policies and procedures for the exchange of
16	information between offices, public guardians, and other
17	appropriate governmental entities, as necessary for offices,
18	public guardians, and governmental entities to properly execute
19	their respective duties and responsibilities relating to
20	guardianship services or other needed services for a ward. An
21	exchange of information under this subsection does not constitute a
22	release for purposes of waiving the confidentiality of the
23	information exchanged.
24	(e) To the extent consistent with policies and procedures
25	adopted by an office or public guardian, the office or public
26	guardian on request may release confidential information in the
27	record of an individual who is a former ward of the office or public

1	guardian to:
2	(1) the individual;
3	(2) the individual's guardian; or
4	(3) an executor or administrator of the individual's
5	estate.
6	(f) Before releasing confidential information under
7	Subsection (e), an office or public guardian shall edit the
8	information to protect the identity of any individual whose life or
9	safety may be endangered by the release. A release of information
10	under Subsection (e) does not constitute a release for purposes of
11	waiving the confidentiality of the information released.
12	Sec. 1104.336. CERTAIN ADMINISTRATIVE COSTS. (a) If an
13	office or public guardian is appointed guardian of the person or of
14	the estate of a ward, or both, the administrative costs of the
15	guardianship services provided to the ward may not be charged to the
16	ward's estate unless the court determines, subject to Subsection
17	(b), that the ward is financially able to pay all or part of the
18	costs.
19	(b) A court shall measure a ward's ability to pay for costs
20	under Subsection (a) by whether the ward has sufficient assets or
21	other resources to pay a private professional guardian to serve as
22	the ward's guardian in accordance with Section 1104.334(b).
23	Sec. 1104.337. OFFICE OF COURT ADMINISTRATION OF THE TEXAS
24	JUDICIAL SYSTEM; REPORT. (a) Not later than December 1 of each
25	even-numbered year, the Office of Court Administration of the Texas
26	Judicial System shall submit a report to the governor and the
27	legislature that contains an evaluation of public guardians

established under this subchapter, including the establishment and 1 2 operation of offices of public guardians under this subchapter and 3 the provision of guardianship services by the offices. The report 4 must include: 5 (1) an analysis of costs and offsetting savings or other benefits to the state as a result of the establishment and 6 7 operation of offices and public guardians under this subchapter; 8 and 9 (2) recommendations for legislation, if any. (b) If it is cost-effective and feasible, the Office of 10 11 Court Administration of the Texas Judicial System may contract with an appropriate research or public policy entity with expertise in 12 13 gerontology, disabilities, and public administration to conduct 14 the analysis described by Subsection (a)(1). Sec. 1104.338. <u>RULES. The supreme court, in consultation</u> 15 16 with the Office of Court Administration of the Texas Judicial System and the presiding judge of the statutory probate courts 17 elected under Section 25.0022, Government Code, shall adopt rules 18 necessary to implement this subchapter. 19 20 SECTION 4. Section 1104.402(a), Estates Code, is amended to read as follows: 21 22 (a) Except as provided by Section 1104.403, 1104.404, or 1104.406(a), the clerk of the county having venue of the proceeding 23 24 for the appointment of a guardian shall obtain criminal history 25 record information that is maintained by the Department of Public Safety or the Federal Bureau of Investigation identification 26 27 division relating to:

a private professional guardian; 1 (1) 2 (2) each person who represents or plans to represent the interests of a ward as a guardian on behalf of the private 3 4 professional guardian; 5 (3) each person employed by a private professional guardian who will: 6 7 have personal contact with a ward or proposed (A) 8 ward; 9 (B) exercise control over and manage a ward's estate; or 10 11 (C) perform any duties with respect to the 12 management of a ward's estate; 13 (4) each person employed by or volunteering or contracting with a guardianship program to provide guardianship 14 15 services to a ward of the program on the program's behalf; [or] 16 (5) a public guardian appointed under Section 17 1104.327(b); 18 (6) each person who represents or plans to represent the interests of a ward as a guardian on behalf of an office of 19 20 public guardian; (7) each person employed by an office of public 21 guardian who will: 22 23 (A) have personal contact with a ward or proposed 24 ward; 25 (B) exercise control over and manage a ward's e<u>state; or</u> 26 27 (C) perform any duties with respect to the

1 management of a ward's estate; or

2 (8) any other person proposed to serve as a guardian 3 under this title, including a proposed temporary guardian and a 4 proposed successor guardian, other than an attorney.

5 SECTION 5. Section 1104.409, Estates Code, is amended to 6 read as follows:

Sec. 1104.409. USE OF INFORMATION BY COURT. The court shall use the information obtained under this subchapter only in determining whether to:

10 (1) appoint, remove, or continue the appointment of a 11 private professional guardian, a guardianship program, <u>an office of</u> 12 <u>public guardian</u>, or the <u>Health and Human Services Commission</u> 13 [department]; or

14 (2) appoint any other person proposed to serve as a
15 guardian under this title, including a proposed temporary guardian
16 and a proposed successor guardian, other than an attorney.

SECTION 6. Section 1155.151(a-2), Estates Code, is amended to read as follows:

19 (a-2) Notwithstanding any other law requiring the payment 20 of court costs in a guardianship proceeding, the following are not 21 required to pay court costs on the filing of or during a 22 guardianship proceeding:

23

an attorney ad litem;

24

(2) a guardian ad litem;

(3) a person or entity who files an affidavit of
inability to pay the costs under Rule 145, Texas Rules of Civil
Procedure, that shows the person or entity is unable to afford the

1 costs; 2 (4) a nonprofit guardianship program; (5) a governmental entity, including an office of 3 4 public guardian; and 5 (6) a government agency or nonprofit agency providing 6 guardianship services. 7 SECTION 7. Section 1163.005(a), Estates Code, is amended to read as follows: 8 9 (a) The guardian of the estate shall attach to an account the guardian's affidavit stating: 10 11 (1)that the account contains a correct and complete statement of the matters to which the account relates; 12 13 (2) that the guardian has paid the bond premium for the 14 next accounting period; 15 (3) that the guardian has filed all tax returns of the 16 ward due during the accounting period; 17 that the guardian has paid all taxes the ward owed (4) 18 during the accounting period, the amount of the taxes, the date the guardian paid the taxes, and the name of the governmental entity to 19 which the guardian paid the taxes; and 20 (5) 21 if the guardian is a private professional guardian, a guardianship program, an office of public guardian, or 22 the Health and Human Services Commission [Department of Aging and 23 Disability Services], whether the guardian or an individual 24 certified under Subchapter C, Chapter 155 [111], Government Code, 25 who is providing guardianship services to the ward and who is 26 27 swearing to the account on the guardian's behalf, is or has been the

subject of an investigation conducted by the <u>Judicial Branch</u> 1 [Guardianship] Certification Commission 2 [Board] during the accounting period. 3 SECTION 8. Section 1163.101(c), Estates Code, is amended to 4 5 read as follows: 6 (c) The guardian of the person shall file a sworn affidavit 7 that contains: 8 (1)the guardian's current name, address, and 9 telephone number; the ward's date of birth and current name, address, 10 (2) 11 telephone number, and age; a description of the type of home in which the ward 12 (3) resides, which shall be described as: 13 the ward's own home; 14 (A) 15 (B) a nursing home; 16 (C) a guardian's home; 17 (D) a foster home; 18 (E) a boarding home; (F) а relative's home, in which case 19 the description must specify the relative's relationship to the ward; 20 21 a hospital or medical facility; or (G) 22 (H) another type of residence; (4) statements indicating: 23 24 (A) the length of time the ward has resided in the 25 present home; 26 (B) the reason for a change in the ward's 27 residence, if a change in the ward's residence has occurred in the

past year; 1 2 (C) the date the guardian most recently saw the 3 ward; 4 (D) how frequently the guardian has seen the ward 5 in the past year; 6 (E) whether the guardian has possession or 7 control of the ward's estate; (F) the ward's mental health 8 whether has 9 improved, deteriorated, or remained unchanged during the past year, 10 including a description of the change if a change has occurred; 11 (G) whether the ward's physical health has 12 improved, deteriorated, or remained unchanged during the past year, 13 including a description of the change if a change has occurred; whether the ward has regular medical care; 14 (H) 15 and 16 (I) the ward's treatment or evaluation by any of 17 the following persons during the past year, including the person's name and a description of the treatment: 18 (i) a physician; 19 20 (ii) a psychiatrist, psychologist, or other 21 mental health care provider; 22 (iii) a dentist; 23 (iv) a social or other caseworker; or 24 (v) any other individual who provided 25 treatment; a description of the ward's activities during the 26 (5) 27 past year, including recreational, educational, social, and

1 occupational activities, or a statement that no activities were
2 available or that the ward was unable or refused to participate in
3 activities;

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(6) the guardian's evaluation of:

5 (A) the ward's living arrangements as excellent, 6 average, or below average, including an explanation if the 7 conditions are below average;

8 (B) whether the ward is content or unhappy with9 the ward's living arrangements; and

10 (C) unmet needs of the ward;

(7) a statement indicating whether the guardian's power should be increased, decreased, or unaltered, including an explanation if a change is recommended;

14 (8) a statement indicating that the guardian has paid15 the bond premium for the next reporting period;

16 (9) if the guardian is a private professional 17 guardian, a guardianship program, an office of public guardian, or the Health and Human Services Commission [Department of Aging and 18 Disability Services], whether the guardian or an individual 19 certified under Subchapter C, Chapter 155, Government Code, who is 20 providing guardianship services to the ward and who is filing the 21 22 affidavit on the guardian's behalf, is or has been the subject of an investigation conducted by the Judicial Branch [Guardianship] 23 24 Certification Commission [Board] during the preceding year; and

(10) any additional information the guardian desiresto share with the court regarding the ward, including:

(A) whether the guardian has filed for emergency

detention of the ward under Subchapter A, Chapter 573, Health and
 Safety Code; and

3 (B) if applicable, the number of times the 4 guardian has filed for emergency detention and the dates of the 5 applications for emergency detention.

6 SECTION 9. Section 101.0814, Government Code, is amended to 7 read as follows:

8 Sec. 101.0814. STATUTORY COUNTY COURT FEES AND COSTS: 9 LOCAL GOVERNMENT CODE. The clerk of a statutory county court shall 10 collect fees and costs under the Local Government Code as follows:

(1) additional filing fee to fund contingency fund for liability insurance, if authorized by the county commissioners court (Sec. 82.003, Local Government Code) . . . not to exceed \$5; (2) civil court actions (Sec. 118.052, Local

15 Government Code):

16 (A) filing of original action (Secs. 118.052 and
17 118.053, Local Government Code):

18 (i) garnishment after judgment (Sec.
19 118.052, Local Government Code) . . . \$15; and

20 (ii) all others (Sec. 118.052, Local 21 Government Code) . . . \$40;

(B) filing of action other than original (Secs.
118.052 and 118.054, Local Government Code) . . . \$30; and
(C) services rendered after judgment in original
action (Secs. 118.052 and 118.0545, Local Government Code):

26 (i) abstract of judgment (Sec. 118.052,
27 Local Government Code) . . . \$5; and

S.B. No. 1426 1 (ii) execution, order of sale, writ, or 2 other process (Sec. 118.052, Local Government Code) . . . \$5; (3) probate court actions (Sec. 118.052, Local 3 4 Government Code): probate original action (Secs. 118.052 and 5 (A) 118.055, Local Government Code): 6 7 (i) probate of a will with independent executor, administration with will attached, administration of an 8 9 estate, guardianship or receivership of an estate, or muniment of title (Sec. 118.052, Local Government Code) . . . \$40; 10 11 (ii) community survivors (Sec. 118.052, Local Government Code) . . . \$40; 12 13 (iii) small estates (Sec. 118.052, Local Government Code) . . . \$40; 14 15 (iv) declarations of heirship (Sec. 16 118.052, Local Government Code) . . . \$40; 17 (v) mental health or chemical dependency services (Sec. 118.052, Local Government Code) . . . \$40; and 18 (vi) additional, special fee (Secs. 118.052 19 20 and 118.064, Local Government Code) . . . \$5; services in pending probate action (Secs. 21 (B) 118.052 and 118.056, Local Government Code): 22 filing an inventory and appraisement 23 (i) 24 (Secs. 118.052 and 118.056(d), Local Government Code) . . . \$25; 25 (ii) approving and recording bond (Sec. 118.052, Local Government Code) . . . \$3; 26 27 (iii) administering oath (Sec. 118.052,

Local Government Code) . . . \$2; 1 2 (iv) filing annual or final account of estate (Sec. 118.052, Local Government Code) . . . \$25; 3 4 (v) filing application for sale of real or personal property (Sec. 118.052, Local Government Code) . . . \$25; 5 6 (vi) filing annual or final report of 7 guardian of a person (Sec. 118.052, Local Government Code) . . . \$10; and 8 9 (vii) filing a document not listed under this paragraph after the filing of an order approving the inventory 10 11 and appraisement or after the 120th day after the date of the initial filing of the action, whichever occurs first (Secs. 118.052 12 13 and 191.007, Local Government Code), if more than 25 pages . . . 14 \$25; 15 (C) adverse probate action (Secs. 118.052 and 16 118.057, Local Government Code) . . . \$40; 17 claim against estate (Secs. 118.052 (D) and 118.058, Local Government Code) . . . \$10; 18 supplemental 19 (E) public [court-initiated] 20 guardianship and related services fee (Secs. 118.052 and 118.067, Local Government Code) . . . \$20; and 21 22 (F) supplemental public probate administrator fee (Secs. 118.052 and 118.068, Local Government Code) . . . \$10; 23 (4) other fees (Sec. 118.052, Local Government Code): 24 25 (A) issuing document (Secs. 118.052 and 118.059, Local Government Code): 26 27 (i) original document and one copy (Sec.

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S.B. No. 1426 118.052, Local Government Code) . . . \$4; and 1 2 (ii) each additional set of an original and one copy (Sec. 118.052, Local Government Code) . . . \$4; 3 4 (B) certified papers (Secs. 118.052 and 118.060, Local Government Code): 5 (i) for the clerk's 6 certificate (Sec. 7 118.052, Local Government Code) . . . \$5; and (ii) a fee per page or part of a page (Sec. 8 118.052, Local Government Code) . . . \$1; 9 10 noncertified papers, for each page or part of (C) 11 a page (Secs. 118.052 and 118.0605, Local Government Code) . . . 12 \$1; 13 (D) letters testamentary, letter of guardianship, letter of administration, or abstract of judgment 14 15 (Secs. 118.052 and 118.061, Local Government Code) . . . \$2; 16 (E) safekeeping of wills (Secs. 118.052 and 118.062, Local Government Code) . . . \$5; 17 18 (F) mail service of process (Secs. 118.052 and 118.063, Local Government Code) . . . same as sheriff; and 19 20 (G) records management and preservation fee (Secs. 118.052, 118.0546, and 118.0645, Local Government Code) 21 . . . \$5; 22 (5) additional filing fee for filing any civil action 23 or proceeding requiring a filing fee, including an appeal, and on 24 25 the filing of any counterclaim, cross-action, intervention, interpleader, or third-party action requiring a filing fee, to fund 26 27 civil legal services for the indigent (Sec. 133.153, Local

1 Government Code) . . . \$10;

2 (6) on the filing of a civil suit, an additional filing
3 fee to be used for court-related purposes for the support of the
4 judiciary (Sec. 133.154, Local Government Code) . . . \$42;

5 (7) additional filing fee to fund the courthouse 6 security fund, if authorized by the county commissioners court 7 (Sec. 291.008, Local Government Code) . . . not to exceed \$5;

8 (8) additional filing fee for filing documents not 9 subject to certain filing fees to fund the courthouse security 10 fund, if authorized by the county commissioners court (Sec. 11 291.008, Local Government Code) . . . \$1;

(9) additional filing fee to fund the courthouse security fund in Webb County, if authorized by the county commissioners court (Sec. 291.009, Local Government Code)...not to exceed \$20; and

16 (10) court cost in civil cases other than suits for 17 delinquent taxes to fund the county law library fund, if authorized 18 by the county commissioners court (Sec. 323.023, Local Government 19 Code)...not to exceed \$35.

20 SECTION 10. Section 101.1013, Government Code, is amended 21 to read as follows:

22 Sec. 101.1013. STATUTORY PROBATE COURT FEES AND COSTS: 23 LOCAL GOVERNMENT CODE. The clerk of a statutory probate court shall 24 collect fees and costs under the Local Government Code as follows:

(1) additional filing fee for filing any civil action
or proceeding requiring a filing fee, including an appeal, and on
the filing of any counterclaim, cross-action, intervention,

interpleader, or third-party action requiring a filing fee to fund 1 2 civil legal services for the indigent (Sec. 133.153, Local Government Code) . . . \$10; 3 additional filing fee to fund contingency fund for 4 (2) liability insurance, if authorized by the county commissioners 5 court (Sec. 82.003, Local Government Code) . . . not to exceed \$5; 6 7 (3) probate court actions (Sec. 118.052, Local Government Code): 8 9 (A) probate original action (Secs. 118.052 and 10 118.055, Local Government Code): 11 (i) probate of a will with independent executor, administration with will attached, administration of an 12 13 estate, guardianship or receivership of an estate, or muniment of title (Sec. 118.052, Local Government Code) . . . \$40; 14 15 (ii) community survivors (Sec. 118.052, 16 Local Government Code) . . . \$40; 17 (iii) small estates (Sec. 118.052, Local Government Code) . . . \$40; 18 (iv) declarations 19 of heirship (Sec. 20 118.052, Local Government Code) . . . \$40; (v) mental health or chemical dependency 21 services (Sec. 118.052, Local Government Code) . . . \$40; and 22 (vi) additional, special fee (Secs. 118.052 23 and 118.064, Local Government Code) . . . \$5; 24 25 (B) services in pending probate action (Secs. 118.052 and 118.056, Local Government Code): 26 27 (i) filing an inventory and appraisement

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S.B. No. 1426 (Secs. 118.052 and 118.056(d), Local Government Code) . . . \$25; 1 2 (ii) approving and recording bond (Sec. 118.052, Local Government Code) . . . \$3; 3 4 (iii) administering oath (Sec. 118.052, Local Government Code) . . . \$2; 5 (iv) filing annual or final account of 6 7 estate (Sec. 118.052, Local Government Code). . . \$25; filing application for sale of real or 8 (v) 9 personal property (Sec. 118.052, Local Government Code) . . . \$25; 10 (vi) filing annual or final report of 11 guardian of a person (Sec. 118.052, Local Government Code) . . . 12 \$10; and 13 (vii) filing a document not listed under 14 this paragraph after the filing of an order approving the inventory and appraisement or after the 120th day after the date of the 15 16 initial filing of the action, whichever occurs first (Secs. 118.052 and 191.007, Local Government Code), if more than 25 pages . . . 17 \$25; 18 (C) adverse probate action (Secs. 118.052 and 19 20 118.057, Local Government Code) . . . \$40; 21 (D) claim against estate (Secs. 118.052 and 118.058, Local Government Code) . . . \$10; 22 23 (E) supplemental public [court-initiated] guardianship and related services fee (Secs. 118.052 and 118.067, 24 Local Government Code) . . . \$20; and 25 (F) supplemental public probate administrator 26 27 fee (Secs. 118.052 and 118.068, Local Government Code) . . . \$10;

(4) other fees (Sec. 118.052, Local Government Code): 1 2 (A) issuing document (Secs. 118.052 and 118.059, Local Government Code): 3 4 (i) original document and one copy (Sec. 118.052, Local Government Code) . . . \$4; and 5 6 (ii) each additional set of an original and 7 one copy (Sec. 118.052, Local Government Code) . . . \$4; (B) certified papers (Secs. 118.052 and 118.060, 8 9 Local Government Code): (i) 10 for the clerk's certificate (Sec. 11 118.052, Local Government Code) . . . \$5; and 12 (ii) a fee per page or part of a page (Sec. 13 118.052, Local Government Code) . . . \$1; noncertified papers, for each page or part of 14 (C) 15 a page (Secs. 118.052 and 118.0605, Local Government Code) . . . 16 \$1; 17 (D) letters testamentary, letter of guardianship, letter of administration, or abstract of judgment 18 (Secs. 118.052 and 118.061, Local Government Code) . . . \$2; 19 safekeeping of wills (Secs. 118.052 20 (E) and 118.062, Local Government Code) . . . \$5; 21 22 mail service of process (Secs. 118.052 and (F) 118.063, Local Government Code) . . . same as sheriff; and 23 24 (G) records management and preservation fee 25 (Secs. 118.052 and 118.0645, Local Government Code) . . . \$5; and (5) court cost in civil cases other than suits for 26 27 delinquent taxes to fund the county law library fund, if authorized

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by the county commissioners court (Sec. 323.023, Local Government
 Code) . . . not to exceed \$35.

3 SECTION 11. Section 101.1214, Government Code, is amended 4 to read as follows:

5 Sec. 101.1214. COUNTY COURT FEES AND COSTS: LOCAL 6 GOVERNMENT CODE. The clerk of a county court shall collect the 7 following fees and costs under the Local Government Code:

8 (1) additional filing fee to fund contingency fund for 9 liability insurance, if authorized by the county commissioners 10 court (Sec. 82.003, Local Government Code) . . . not to exceed \$5;

11 (2) civil court actions (Sec. 118.052, Local
12 Government Code):

13 (A) filing of original action (Secs. 118.052 and
14 118.053, Local Government Code):

(i) garnishment after judgment (Sec.
16 118.052, Local Government Code) . . . \$15; and

17 (ii) all others (Sec. 118.052, Local 18 Government Code) . . . \$40;

(B) filing of action other than original (Secs.
20 118.052 and 118.054, Local Government Code) . . . \$30; and

(C) services rendered after judgment in original
 action (Secs. 118.052 and 118.0545, Local Government Code):

23 (i) abstract of judgment (Sec. 118.052,
 24 Local Government Code) . . \$5; and

(ii) execution, order of sale, writ, or
other process (Sec. 118.052, Local Government Code) . . . \$5;
(3) probate court actions (Sec. 118.052, Local

S.B. No. 1426 Government Code): 1 2 (A) probate original action (Secs. 118.052 and 118.055, Local Government Code): 3 4 (i) probate of a will with independent executor, administration with will attached, administration of an 5 estate, guardianship or receivership of an estate, or muniment of 6 7 title (Sec. 118.052, Local Government Code) . . . \$40; (ii) community survivors (Sec. 8 118.052, 9 Local Government Code) . . . \$40; 10 (iii) small estates (Sec. 118.052, Local Government Code) . . . \$40; 11 12 (iv) declarations of heirship (Sec. 13 118.052, Local Government Code) . . . \$40; 14 (v) mental health or chemical dependency 15 services (Sec. 118.052, Local Government Code) . . . \$40; and 16 (vi) additional, special fee (Secs. 118.052 17 and 118.064, Local Government Code) . . . \$5; 18 (B) services in pending probate action (Secs. 118.052 and 118.056, Local Government Code): 19 20 (i) filing an inventory and appraisement (Secs. 118.052 and 118.056(d), Local Government Code) . . . \$25; 21 22 (ii) approving and recording bond (Sec. 118.052, Local Government Code) . . . \$3; 23 24 (iii) administering oath (Sec. 118.052, 25 Local Government Code) . . . \$2; (iv) filing annual or final account of 26 27 estate (Sec. 118.052, Local Government Code) . . . \$25;

1 (v) filing application for sale of real or 2 personal property (Sec. 118.052, Local Government Code) . . . \$25; (vi) filing annual or final report of 3 4 guardian of a person (Sec. 118.052, Local Government Code) . . . \$10; and 5 6 (vii) filing a document not listed under 7 this paragraph after the filing of an order approving the inventory and appraisement or after the 120th day after the date of the 8 9 initial filing of the action, whichever occurs first (Secs. 118.052 and 191.007, Local Government Code), if more than 25 pages . . . 10 11 \$25; adverse probate action (Secs. 118.052 and 12 (C) 13 118.057, Local Government Code) . . . \$40; claim against estate (Secs. 14 (D) 118.052 and 118.058, Local Government Code) . . . \$10; 15 16 (E) supplemental public [court-initiated] guardianship and related services fee (Secs. 118.052 and 118.067, 17 Local Government Code) . . . \$20; and 18 supplemental public probate administrator 19 (F) 20 fee (Secs. 118.052 and 118.068, Local Government Code) . . . \$10; (4) other fees (Sec. 118.052, Local Government Code): 21 22 issuing document (Secs. 118.052 and 118.059, (A) Local Government Code): 23 24 (i) original document and one copy (Sec. 25 118.052, Local Government Code) . . . \$4; and (ii) each additional set of an original and 26 27 one copy (Sec. 118.052, Local Government Code) . . . \$4;

S.B. No. 1426 1 (B) certified papers (Secs. 118.052 and 118.060, 2 Local Government Code): (i) for the clerk's certificate 3 (Sec. 4 118.052, Local Government Code) . . . \$5; and 5 (ii) a fee per page or part of a page (Sec. 118.052, Local Government Code) . . . \$1; 6 7 (C) noncertified papers, for each page or part of a page (Secs. 118.052 and 118.0605, Local Government Code) . . . 8 9 \$1; 10 (D) letters testamentary, letter of 11 guardianship, letter of administration, or abstract of judgment (Secs. 118.052 and 118.061, Local Government Code) . . . \$2; 12 13 (E) safekeeping of wills (Secs. 118.052 and 118.062, Local Government Code) . . . \$5; 14 15 (F) mail service of process (Secs. 118.052 and 16 118.063, Local Government Code) . . . same as sheriff; and (G) records management and preservation 17 fee (Secs. 118.052, 118.0546, and 118.0645, Local Government Code) 18 · · · \$5; 19 deposit on filing petition requesting permission 20 (5) 21 to create a municipal civic center authority (Sec. 281.013, Local Government Code) . . . \$200; 22 (6) additional filing fee to fund the courthouse 23 security fund, if authorized by the county commissioners court 24 25 (Sec. 291.008, Local Government Code) . . . not to exceed \$5; (7) additional filing fee for filing documents not 26 27 subject to certain filing fees to fund the courthouse security

1 fund, if authorized by the county commissioners court (Sec.
2 291.008, Local Government Code) . . . \$1;

3 (8) additional filing fee to fund the courthouse 4 security fund in Webb County, if authorized by the county 5 commissioners court (Sec. 291.009, Local Government Code) . . . not 6 to exceed \$20;

7 (9) court cost in civil cases other than suits for
8 delinquent taxes to fund the county law library fund, if authorized
9 by the county commissioners court (Sec. 323.023, Local Government
10 Code) . . . not to exceed \$35;

(10) additional filing fee for filing any civil action or proceeding requiring a filing fee, including an appeal, and on the filing of any counterclaim, cross-action, intervention, interpleader, or third-party action requiring a filing fee, to fund civil legal services for the indigent (Sec. 133.153, Local Government Code) . . . \$10; and

(11) on the filing of a civil suit an additional filing fee to be used for court-related purposes for the support of the judiciary (Sec. 133.154, Local Government Code) . . . \$42.

20 SECTION 12. Section 155.001, Government Code, is amended by 21 amending Subdivisions (4), (6), and (6-a) and adding Subdivisions 22 (5-a) and (6-b) to read as follows:

(4) "Guardianship program" means a local, county, or regional program, other than an office of public guardian, that provides guardianship and related services to an incapacitated person or other person who needs assistance in making decisions concerning the person's own welfare or financial affairs.

1 (5-a) "Office of public guardian" has the meaning
2 assigned by Section 1002.0215, Estates Code.

3 (6) "Private professional guardian" means a person,
4 other than an attorney, [or] a corporate fiduciary, or an office of
5 <u>public guardian</u>, who is engaged in the business of providing
6 guardianship services.

7 (6-a) "Public guardian" has the meaning assigned by
8 Section 1002.0265, Estates Code.

9 (6-b) Notwithstanding Section 151.001, "registration"
 10 means registration of a guardianship under this chapter.

SECTION 13. Subchapter B, Chapter 155, Government Code, is amended by adding Section 155.053 to read as follows:

13 Sec. 155.053. MONITORING OF COUNTY PUBLIC GUARDIANSHIP AND RELATED SERVICES FUNDS. The office shall monitor counties to 14 ensure money is appropriately deposited into the public 15 guardianship and related services funds established by counties 16 under Section 118.067, Local Government Code, and being used in 17 compliance with that section. Not later than December 1 of each 18 year, the office shall submit a report to the legislature detailing 19 20 how money in the funds is being used by counties across the state.

21 SECTION 14. Section 155.101(a), Government Code, is amended 22 to read as follows:

(a) The commission shall adopt minimum standards for:
(1) the provision of guardianship services or other
similar but less restrictive types of assistance or services by:
(A) individuals employed by or contracting with
guardianship programs to provide the assistance or services on

behalf of the programs; and 1 2 (B) private professional guardians; [and] 3 (2) the provision of guardianship services by the 4 Health and Human Services Commission; and 5 (3) the provision of guardianship services by offices of public guardians [Department of Aging and Disability Services or 6 7 its successor agency]. SECTION 15. Section 155.102(a), Government Code, is amended 8 9 to read as follows: 10 To provide guardianship services in this state, the (a) following individuals must hold a certificate issued under this 11 section: 12 13 (1)an individual who is a private professional 14 guardian; an individual who will provide those services to a 15 (2) 16 ward of a private professional guardian on the guardian's behalf; [and] 17 18 (3) an individual, other than a volunteer, who will provide those services or other services under Section 161.114, 19 20 Human Resources Code, to a ward of a guardianship program or the Health and Human Services Commission [Department of Aging and 21 22 Disability Services] on the program's or commission's [department's] behalf; 23 (4) an individual who is a public guardian; and 24 25 (5) an individual who will provide those services to a ward of an office of public guardian. 26 SECTION 16. Section 155.105, Government Code, is amended by 27

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adding Subsection (b-1) to read as follows: for the preceding year: (1) the number of wards served by the office; (2) the total amount of any money received from this state for the provision of guardianship services; and (3) the amount of money received from any other public source, including a county or the federal government, for the provision of guardianship services, reported by source, and the total amount of money received from those public sources. SECTION 17. Section 411.1386(a), Government Code, amended to read as follows: (a) maintained by the department that relates to: a private professional guardian; (1)(2) each person who represents or plans to represent the interests of a ward as a guardian on behalf of the private professional guardian; quardian who will: (A) have personal contact with a ward or proposed ward; (B) exercise control over and manage a ward's

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2 (b-1) Not later than January 31 of each year, each office of public guardian shall provide to the commission a report containing 3

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Except as provided by Subsections (a-1), (a-5), and 14 15 (a-6), the clerk of the county having venue over a proceeding for 16 the appointment of a guardian under Title 3, Estates Code, shall obtain from the department criminal history record information 17 18

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(3) each person employed by a private professional 23 24

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1 estate; or 2 (C) perform any duties with respect to the management of a ward's estate; 3 4 (4) each person employed by or volunteering or contracting with a guardianship program to provide guardianship 5 services to a ward of the program on the program's behalf; [or] 6 7 (5) a <u>public guardian</u>, as defined by Section 1002.0265(1), Estates Code; 8 9 (6) each person who represents or plans to represent the interests of a ward as a guardian on behalf of an office of 10 11 public guardian; (7) each person employed by an office of public 12 13 guardian, as defined by Section 1002.0215, Estates Code, who will: 14 (A) have personal contact with a ward or proposed 15 ward; 16 (B) exercise control over and manage a ward's 17 estate; or 18 (C) perform any duties with respect to the management of a ward's estate; or 19 20 (8) any other person proposed to serve as a guardian under Title 3, Estates Code, including a proposed temporary 21 guardian and a proposed successor guardian, other than an attorney. 22 SECTION 18. Section 161.103, Human Resources Code, 23 is amended to read as follows: 24 Sec. 161.103. CONTRACT FOR GUARDIANSHIP SERVICES. 25 (a) Ιf appropriate, the commission [department] may contract with a 26

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political subdivision of this state, a guardianship program as

1 defined by Section 1002.016, Estates Code, a private agency, or 2 another state agency for the provision of guardianship services 3 under this section.

4 (b) A contract under Subsection (a) may allow for the
5 provision of guardianship services by an office of public guardian,
6 as defined by Section 1002.0215, Estates Code.

7 SECTION 19. Section 118.052, Local Government Code, is 8 amended to read as follows:

9 Sec. 118.052. FEE SCHEDULE. Each clerk of a county court 10 shall collect the following fees for services rendered to any 11 person:

(1) CIVIL COURT ACTIONS 12 Filing of Original Action (Sec. 118.053): 13 (A) (i) Garnishment after judgment . . . \$15.00 14 (ii) All others . . . \$40.00 15 16 (B) Filing of Action Other than Original (Sec. 17 118.054) . . . \$30.00 18 (C) Services Rendered After Judgment in Original Action (Sec. 118.0545): 19 20 (i) Abstract of judgment . . . \$ 5.00 21 (ii) Execution, order of sale, writ, or other process . . . \$ 5.00 22 (2) PROBATE COURT ACTIONS 23 24 Probate Original Action (Sec. 118.055): (A) 25 (i) Probate of a will with independent executor, administration with will attached, administration of an 26 27 estate, guardianship or receivership of an estate, or muniment of

title . . . \$40.00 1 2 (ii) Community survivors . . . \$40.00 (iii) Small estates . . . \$40.00 3 (iv) Declarations of heirship . . . \$40.00 4 5 (v) Mental health or chemical dependency services . . . \$40.00 6 7 (vi) Additional, special fee (Sec. 118.064) . . \$ 5.00 8 Services in Pending Probate Action (Sec. 9 (B) 10 118.056): 11 (i) Filing an inventory and appraisement as provided by Section 118.056(d) . . . \$25.00 12 13 (ii) Approving and recording bond . . . \$ 3.00 14 15 (iii) Administering oath . . . \$ 2.00 16 (iv) Filing annual or final account of 17 estate . . . \$25.00 18 (v) Filing application for sale of real or personal property . . . \$25.00 19 20 (vi) Filing annual or final report of guardian of a person . . . \$10.00 21 (vii) Filing a document not listed under 22 this paragraph after the filing of an order approving the inventory 23 and appraisement or after the 120th day after the date of the 24 25 initial filing of the action, whichever occurs first, if more than 25 pages . . . \$25.00 26 Adverse Probate Action (Sec. 118.057) . . . 27 (C)

\$40.00 1 2 (D) Claim Against Estate (Sec. 118.058) . . . 3 \$10.00 4 (E) Supplemental Public [Court-Initiated] Guardianship and Related Services Fee in Probate Original Actions 5 and Adverse Probate Actions (Sec. 118.067) . . . \$20.00 6 7 (F) Supplemental Public Probate Administrator Fee For Counties That Have Appointed a Public Probate Administrator 8 (Sec. 118.068) . . . \$10.00 9 10 (3) OTHER FEES Issuing Document (Sec. 118.059): 11 (A) 12 original document and one copy . . . \$ 4.00 each additional set of an original and one copy . . . \$ 4.00 13 (B) Certified Papers (Sec. 118.060): 14 for the clerk's certificate . . . \$ 5.00 15 16 plus a fee per page or part of a page of . . . \$ 1.00 17 (C) Noncertified Papers (Sec. 118.0605): 18 for each page or part of a page . . . \$ 1.00 (D) Letters Testamentary, of 19 Letter Guardianship, Letter of Administration, or Abstract of Judgment 20 (Sec. 118.061) . . . \$ 2.00 21 22 (E) Deposit and Safekeeping of Wills (Sec. 118.062) . . . \$ 5.00 23 Mail Service of Process (Sec. 118.063) . . . 24 (F) 25 same as sheriff Records Management 26 (G) and Preservation Fee 27 . . . \$ 5.00

(H) Records Technology and Infrastructure Fee if
 authorized by the commissioners court of the county (Sec. 118.026)
 . . \$ 2.00

4 SECTION 20. Section 118.067, Local Government Code, is 5 amended to read as follows:

Sec. 118.067. SUPPLEMENTAL 6 PUBLIC [COURT-INITIATED] 7 GUARDIANSHIP AND RELATED SERVICES FEE. (a) The "supplemental public [court-initiated] guardianship and related services fee" 8 9 under Section 118.052(2)(E) is for the support of guardianship services provided by public guardians, as defined by Section 10 <u>1002.0265</u> [the judiciary in guardianships initiated under Chapter 11 1102], Estates Code, or guardianship and other less restrictive 12 alternative services provided to indigent incapacitated persons 13 who do not have family members suitable and willing to serve as 14 15 guardians or provide less restrictive alternative services. Fees 16 collected under Section 118.052(2)(E) shall be deposited in a public [court-initiated] guardianship and related services fund in 17 the county treasury and may be used only to supplement, rather than 18 supplant, other available county funds used to fund guardianship 19 20 services or other less restrictive alternative services provided to individuals who are indigent[+ 21

Individuals who are indigent [+

22 [(1) pay the compensation of a guardian ad litem
23 appointed by a court under Section 1102.001, Estates Code;

24 [(2) pay the compensation of an attorney ad litem

25 appointed by a court to represent a proposed ward in a guardianship
26 proceeding initiated under Chapter 1102, Estates Code; and

27 [(3) fund local guardianship programs that provide

1 guardians for indigent incapacitated persons who do not have family
2 members suitable and willing to serve as guardians].

3 (b) The supplemental <u>public</u> [court-initiated] guardianship
4 <u>and related services</u> fee is charged for:

5 (1) a probate original action described by Section 6 118.055 and for which a fee is charged in accordance with Section 7 118.052(2)(A)(i), (ii), (iii), (iv), or (v); and

8 (2) an adverse probate action described by Section 9 118.057 and for which a fee is charged in accordance with Section 10 118.052(2)(C).

11 (c) The supplemental <u>public</u> [court-initiated] guardianship 12 <u>and related services</u> fee must be paid by the person against whom the 13 fee for a probate original action or adverse probate action, as 14 applicable, is charged and is due at the time that fee is due.

(d) The supplemental <u>public</u> [court-initiated] guardianship
 <u>and related services</u> fee is in addition to all other fees charged in
 probate original actions and adverse probate actions.

18 SECTION 21. Not later than January 1, 2020, the supreme 19 court shall adopt rules necessary to implement Subchapter G-1, 20 Chapter 1104, Estates Code, as added by this Act, including rules 21 governing the transfer of a guardianship of the person or of the 22 estate of a ward, or both, if appropriate, to an office of public 23 guardian established under that subchapter or a public guardian 24 contracted under that subchapter.

25 SECTION 22. (a) The changes in law made by this Act apply 26 only to the appointment of a guardian of the person or of the estate 27 of a ward, or both, made on or after July 1, 2020.

(b) Notwithstanding any other law, a person 1 who, 2 immediately before July 1, 2020, is serving as guardian of the person or of the estate of a ward, or both, who, under Section 3 1104.334, Estates Code, as added by this Act, would be eligible for 4 5 appointment of an office of public guardian as the ward's guardian, may continue to serve as guardian of the person or of the estate of 6 7 the ward, or both, unless otherwise removed as provided by law. SECTION 23. This Act takes effect September 1, 2019. 8