STATE OF NEW YORK

8301

2025-2026 Regular Sessions

IN ASSEMBLY

May 12, 2025

Introduced by M. of A. LAVINE -- (at request of the Unified Court System) -- read once and referred to the Committee on Judiciary

AN ACT to amend the surrogate's court procedure act, in relation to guardians of persons who are intellectually and developmentally disabled; and to repeal certain provisions of such law relating thereto

The People of the State of New York, represented in Senate and Assembly, do enact as follows:

Section 1. Section 1750 of the surrogate's court procedure act is REPEALED and a new section 1750 is added to read as follows:

§ 1750. Definitions

When used in this article:

1. "Developmental disability" shall mean a developmental disability within the meaning of subdivision twenty-two of section 1.03 of the mental hygiene law.

2. "Traumatic brain injury" shall mean an injury, as defined in section twenty-seven hundred forty-one of the public health law, which originated before the age of twenty-two.

3. "Respondent" shall mean an individual listed in the petition as alleged to have a developmental disability or traumatic brain injury, as defined in this section.

§ 2. Section 1750-a of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1750-a. Guardianship of persons [~~who are developmentally disabled~~] **with a developmental disability or traumatic brain injury**

1. When it shall appear to the satisfaction of the court [~~that a person is a person who is developmentally disabled, the court is authorized to appoint a guardian of the person or of the property or of both if such appointment of a guardian or guardians is in the best interest of the person who is developmentally disabled. Such appointments shall be made pursuant to the provisions of this article, provided however that the provisions of section seventeen hundred fifty of this article~~

EXPLANATION--Matter in *italics* (underscored) is new; matter in brackets [-] is old law to be omitted.

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~~shall not apply to the appointment of a guardian or guardians of a person who is developmentally disabled. For the purposes of this article, a person who is developmentally disabled is a person who has been certified by one licensed physician and one licensed psychologist, or by two licensed physicians at least one of whom is familiar with or has professional knowledge in the care and treatment of persons with developmental disabilities, having qualifications to make such certification, as having an impaired ability to understand and appreciate the nature and consequences of decisions which result in such person being incapable of managing himself or herself and/or his or her affairs by reason of developmental disability and that such condition is permanent in nature or likely to continue indefinitely, and whose disability:~~

~~(a) is attributable to cerebral palsy, epilepsy, neurological impairment, autism or traumatic head injury;~~

~~(b) is attributable to any other condition of a person found to be closely related to intellectual disability because such condition results in similar impairment of general intellectual functioning or adaptive behavior to that of persons with intellectual disabilities; or~~

~~(c) is attributable to dyslexia resulting from a disability described in subdivision one or two of this section or from intellectual disability; and~~

~~(d) originates before such person attains age twenty-two, provided, however, that no such age of origination shall apply for the purposes of this article to a person with traumatic head injury.~~

~~2. Notwithstanding any provision of law to the contrary, for the purposes of subdivision two of section seventeen hundred fifty and section seventeen hundred fifty-b of this article, "a person who is intellectually disabled and his or her guardian" shall also mean a person and his or her guardian appointed pursuant to this section; provided that such person has been certified by the physicians and/or psychologists, specified in subdivision one of this section, as (i) having an intellectual disability, or (ii) having a developmental disability, as defined in section 1.03 of the mental hygiene law, which (A) includes intellectual disability, or (B) results in a similar impairment of general intellectual functioning or adaptive behavior so that such person is incapable of managing himself or herself, and/or his or her affairs by reason of such developmental disability~~] based on clear and convincing evidence that the respondent is a person with a developmental disability or traumatic brain injury, the court may appoint pursuant to the provisions of this article a guardian of the person or of the property or both provided that guardianship shall be imposed only if necessary and in the least restrictive manner specifically considering the respondent's functional abilities.

2. Every decree issued pursuant to this article shall include a finding as to whether the respondent has the capacity to make health care decisions, as defined by subdivision three of section twenty-nine hundred eighty of the public health law. A determination that the respondent has the capacity to make health care decisions shall not preclude the appointment of a guardian to make other decisions on behalf of the respondent.

§ 3. Section 1750-b of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, subparagraph (i) of paragraph (b) of subdivision 4 and paragraph (d) of subdivision 5 as amended by chapter 40 of the laws of 2024, is amended to read as follows:

§ 1750-b. Health care decisions for persons [~~who are intellectually disabled~~] **with a developmental disability or traumatic brain injury**

1. Scope of authority. Unless specifically prohibited by the court after consideration of the determination, if any, regarding [~~a~~] **the capacity of a** person [~~who is intellectually disabled's capacity~~] **with a developmental disability or traumatic brain injury** to make health care decisions, which is required by section seventeen hundred [~~fifty~~] **fifty-a** of this article, the guardian of such person appointed pursuant to section seventeen hundred [~~fifty~~] **fifty-a** of this article shall have the authority to make any and all health care decisions, as defined by subdivision six of section twenty-nine hundred eighty of the public health law, on behalf of the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** that such person could make if such person had capacity. Such decisions may include decisions to withhold or withdraw life-sustaining treatment. For purposes of this section, "life-sustaining treatment" means medical treatment, including cardiopulmonary resuscitation and nutrition and hydration provided by means of medical treatment, which is sustaining life functions and without which, according to reasonable medical judgment, the patient will die within a relatively short time period. Cardiopulmonary resuscitation is presumed to be life-sustaining treatment without the necessity of a medical judgment by an attending physician. The provisions of this article are not intended to permit or promote suicide, assisted suicide or euthanasia; accordingly, nothing in this section shall be construed to permit a guardian to consent to any act or omission to which the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** could not consent if such person had capacity.

(a) For the purposes of making a decision to withhold or withdraw life-sustaining treatment pursuant to this section, in the case of a person for whom no guardian has been appointed pursuant to section [~~seventeen hundred fifty or~~] seventeen hundred fifty-a of this article, a "guardian" shall also mean a family member of a person who (i) has [~~intellectual disability~~] **a traumatic brain injury**, or (ii) has a developmental disability[~~, as defined in section 1.03 of the mental hygiene law, which (A) includes intellectual disability, or (B) results in a similar impairment of general intellectual functioning or adaptive behavior so that such person is incapable of managing himself or herself, and/or his or her affairs by reason of such developmental disability~~]. Qualified family members shall be included in a prioritized list of said family members pursuant to regulations established by the commissioner of the office for people with developmental disabilities. Such family members must have a significant and ongoing involvement in a person's life so as to have sufficient knowledge of their needs and, when reasonably known or ascertainable, the person's wishes, including moral and religious beliefs. In the case of a person who was a resident of the former Willowbrook state school on March seventeenth, nineteen hundred seventy-two and those individuals who were in community care status on that date and subsequently returned to Willowbrook or a related facility, who are fully represented by the consumer advisory board and who have no guardians appointed pursuant to this article or have no qualified family members to make such a decision, then a "guardian" shall also mean the Willowbrook consumer advisory board. A decision of such family member or the Willowbrook consumer advisory board to withhold or withdraw life-sustaining treatment shall be subject to all

of the protections, procedures and safeguards which apply to the decision of a guardian to withhold or withdraw life-sustaining treatment pursuant to this section.

In the case of a person for whom no guardian has been appointed pursuant to this article or for whom there is no qualified family member or the Willowbrook consumer advisory board available to make such a decision, a "guardian" shall also mean, notwithstanding the definitions in section 80.03 of the mental hygiene law, a surrogate decision-making committee, as defined in article eighty of the mental hygiene law. All declarations and procedures, including expedited procedures, to comply with this section shall be established by regulations promulgated by the commission on quality of care and advocacy for persons with disabilities.

(b) Regulations establishing the prioritized list of qualified family members required by paragraph (a) of this subdivision shall be developed by the commissioner of the office for people with developmental disabilities in conjunction with parents, advocates and family members of persons who are intellectually disabled. Regulations to implement the authority of the Willowbrook consumer advisory board pursuant to paragraph (a) of this subdivision may be promulgated by the commissioner of the office for people with developmental disabilities with advice from the Willowbrook consumer advisory board.

(c) Notwithstanding any provision of law to the contrary, the formal determinations required pursuant to section seventeen hundred fifty of this article shall only apply to guardians appointed pursuant to section seventeen hundred fifty or seventeen hundred fifty-a of this article.

2. Decision-making standard. (a) The guardian shall base all advocacy and health care decision-making solely and exclusively on the best interests of the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** and, when reasonably known or ascertainable with reasonable diligence, on [~~the person who is intellectually disabled's~~] **such person's** wishes, including moral and religious beliefs.

(b) An assessment of [~~the person who is intellectually disabled's~~] **such person's** best interests shall include consideration of:

(i) the dignity and uniqueness of every person;

(ii) the preservation, improvement or restoration of [~~the person who is intellectually disabled's~~] **such person's** health;

(iii) the relief of [~~the person who is intellectually disabled's~~] **such person's** suffering by means of palliative care and pain management;

(iv) the unique nature of artificially provided nutrition or hydration, and the effect it may have on [~~the~~] **such** person [~~who is intellectually disabled~~]; and

(v) the entire medical condition of the person.

(c) No health care decision shall be influenced in any way by:

(i) a presumption that persons [~~who are intellectually disabled~~] **with a developmental disability or traumatic brain injury** are not entitled to the full and equal rights, equal protection, respect, medical care and dignity afforded to persons without [~~an intellectual disability or~~] a developmental disability **or traumatic brain injury**; or

(ii) financial considerations of the guardian, as such considerations affect the guardian, a health care provider or any other party.

3. Right to receive information. Subject to the provisions of sections 33.13 and 33.16 of the mental hygiene law, the guardian shall have the right to receive all medical information and medical and clinical records necessary to make informed decisions regarding the [~~person who~~

~~is intellectually disabled's~~] health care **of the person with a developmental disability or traumatic brain injury**.

4. Life-sustaining treatment. The guardian shall have the affirmative obligation to advocate for the full and efficacious provision of health care, including life-sustaining treatment. In the event that a guardian makes a decision to withdraw or withhold life-sustaining treatment from a person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**:

(a) The attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law, must confirm to a reasonable degree of medical certainty that the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** lacks capacity to make health care decisions. The determination thereof shall be included in [~~the person who is intellectually disabled's~~] **such person's** medical record, and shall contain such attending physician's opinion regarding the cause and nature of [~~the person who is intellectually disabled's~~] **such person's** incapacity as well as its extent and probable duration. The attending physician who makes the confirmation shall consult with another physician, or a licensed psychologist, to further confirm [~~the person who is intellectually disabled's~~] **such person's** lack of capacity. The attending physician who makes the confirmation, or the physician or licensed psychologist with whom the attending physician consults, must (i) be employed by a developmental disabilities services office named in section 13.17 of the mental hygiene law or employed by the office for people with developmental disabilities to provide treatment and care to people with developmental disabilities, or (ii) have been employed for a minimum of two years to render care and service in a facility or program operated, licensed or authorized by the office for people with developmental disabilities, or (iii) have been approved by the commissioner of the office for people with developmental disabilities in accordance with regulations promulgated by such commissioner. Such regulations shall require that a physician or licensed psychologist possess specialized training or three years experience in treating intellectual disability. A record of such consultation shall be included in the [~~person who is intellectually disabled's~~] medical record **of the person with a developmental disability or traumatic brain injury**.

(b) The attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law, with the concurrence of another physician with whom such attending physician shall consult, must determine to a reasonable degree of medical certainty and note on the [~~person who is intellectually disabled's~~] chart **of the person with a developmental disability or traumatic brain injury** that:

(i) [~~the~~] **such** person [~~who is intellectually disabled~~] has a medical condition as follows:

A. a terminal condition, which for the purpose of this section means an illness or injury from which there is no recovery, and which reasonably can be expected to cause death within one year; or

B. permanent unconsciousness; or

C. a medical condition other than such person's [~~intellectual~~] **developmental** disability **or traumatic brain injury** which requires life-sustaining treatment, is irreversible and which will continue indefinitely; and

(ii) the life-sustaining treatment would impose an extraordinary burden on such person, in light of:

A. such person's medical condition, other than such person's [~~intellectual~~] **developmental** disability **or traumatic brain injury**; and

B. the expected outcome of the life-sustaining treatment, notwithstanding such person's [~~intellectual~~] **developmental** disability **or traumatic brain injury**; and

(iii) in the case of a decision to withdraw or withhold artificially provided nutrition or hydration:

A. there is no reasonable hope of maintaining life; or

B. the artificially provided nutrition or hydration poses an extraordinary burden.

(c) The guardian shall express a decision to withhold or withdraw life-sustaining treatment either:

(i) in writing, dated and signed in the presence of one witness eighteen years of age or older who shall sign the decision, and presented to the attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law; or

(ii) orally, to two persons eighteen years of age or older, at least one of whom is the person who is [~~intellectually disabled's~~] **the** attending physician **to the person with a developmental disability or traumatic brain injury**, as defined in subdivision two of section twenty-nine hundred eighty of the public health law.

(d) The attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law, who is provided with the decision of a guardian shall include the decision in the [~~person who is intellectually disabled's~~] medical chart **of the person with a developmental disability or traumatic brain injury**, and shall either:

(i) promptly issue an order to withhold or withdraw life-sustaining treatment from [~~the~~] **such** person [~~who is intellectually disabled~~], and inform the staff responsible for such person's care, if any, of the order; or

(ii) promptly object to such decision, in accordance with subdivision five of this section.

(e) At least forty-eight hours prior to the implementation of a decision to withdraw life-sustaining treatment, or at the earliest possible time prior to the implementation of a decision to withhold life-sustaining treatment, the attending physician shall notify:

(i) the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, except if the attending physician determines, in writing and in consultation with another physician or a licensed psychologist, that, to a reasonable degree of medical certainty, the person would suffer immediate and severe injury from such notification. The attending physician who makes the confirmation, or the physician or licensed psychologist with whom the attending physician consults, shall:

A. be employed by a developmental disabilities services office named in section 13.17 of the mental hygiene law or employed by the office for people with developmental disabilities to provide treatment and care to people with developmental disabilities, or

B. have been employed for a minimum of two years to render care and service in a facility operated, licensed or authorized by the office for people with developmental disabilities, or

C. have been approved by the commissioner of the office for people with developmental disabilities in accordance with regulations promulgated by such commissioner. Such regulations shall require that a physician or licensed psychologist possess specialized training or three

years experience in treating intellectual disability. A record of such consultation shall be included in the [~~person who is intellectually disabled's~~] medical record **of the person with a developmental disability or traumatic brain injury**;

(ii) if the person is in or was transferred from a residential facility operated, licensed or authorized by the office for people with developmental disabilities, the chief executive officer of the agency or organization operating such facility and the mental hygiene legal service; and

(iii) if the person is not in and was not transferred from such a facility or program, the commissioner of the office for people with developmental disabilities, or [~~his or her~~] **their** designee.

5. Objection to health care decision. (a) Suspension. A health care decision made pursuant to subdivision four of this section shall be suspended, pending judicial review, except if the suspension would in reasonable medical judgment be likely to result in the death of the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, in the event of an objection to that decision at any time by:

(i) the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** on whose behalf such decision was made; or

(ii) a parent or adult sibling who either resides with or has maintained substantial and continuous contact with the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**; or

(iii) the attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law; or

(iv) any other health care practitioner providing services to the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, who is licensed pursuant to article one hundred thirty-one, one hundred thirty-one-B, one hundred thirty-two, one hundred thirty-three, one hundred thirty-six, one hundred thirty-nine, one hundred forty-one, one hundred forty-three, one hundred forty-four, one hundred fifty-three, one hundred fifty-four, one hundred fifty-six, one hundred fifty-nine or one hundred sixty-four of the education law; or

(v) the chief executive officer identified in subparagraph (ii) of paragraph (e) of subdivision four of this section; or

(vi) if the person is in or was transferred from a residential facility or program operated, approved or licensed by the office for people with developmental disabilities, the mental hygiene legal service; or

(vii) if the person is not in and was not transferred from such a facility or program, the commissioner of the office for people with developmental disabilities, or [~~his or her~~] **their** designee.

(b) Form of objection. Such objection shall occur orally or in writing.

(c) Notification. In the event of the suspension of a health care decision pursuant to this subdivision, the objecting party shall promptly notify the guardian and the other parties identified in paragraph (a) of this subdivision, and the attending physician shall record such suspension in the [~~person who is intellectually disabled's~~] medical chart **of the person with a developmental disability or traumatic brain injury**.

(d) Dispute mediation. In the event of an objection pursuant to this subdivision, at the request of the objecting party or person or entity

authorized to act as a guardian under this section, except a surrogate decision making committee established pursuant to article eighty of the mental hygiene law, such objection shall be referred to an ethics review committee, established pursuant to section two thousand nine hundred ninety-four-m of the public health law or similar entity for mediating disputes in a hospice, such as a patient's advocate's office, hospital chaplain's office or ethics committee, as described in writing and adopted by the governing authority of such hospice, for non-binding mediation. In the event that such dispute cannot be resolved within seventy-two hours or no such mediation entity exists or is reasonably available for mediation of a dispute, the objection shall proceed to judicial review pursuant to this subdivision. The party requesting mediation shall provide notification to those parties entitled to notice pursuant to paragraph (a) of this subdivision.

6. Special proceeding authorized. The guardian, the attending physician, as defined in subdivision two of section twenty-nine hundred eighty of the public health law, the chief executive officer identified in subparagraph (ii) of paragraph (e) of subdivision four of this section, the mental hygiene legal service (if the person is in or was transferred from a residential facility or program operated, approved or licensed by the office for people with developmental disabilities) or the commissioner of the office for people with developmental disabilities or [~~his or her~~] **their** designee (if the person is not in and was not transferred from such a facility or program) may commence a special proceeding in a court of competent jurisdiction with respect to any dispute arising under this section, including objecting to the withdrawal or withholding of life-sustaining treatment because such withdrawal or withholding is not in accord with the criteria set forth in this section.

7. Provider's obligations. (a) A health care provider shall comply with the health care decisions made by a guardian in good faith pursuant to this section, to the same extent as if such decisions had been made by the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, if such person had capacity.

(b) Notwithstanding paragraph (a) of this subdivision, nothing in this section shall be construed to require a private hospital to honor a guardian's health care decision that the hospital would not honor if the decision had been made by the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, if such person had capacity, because the decision is contrary to a formally adopted written policy of the hospital expressly based on religious beliefs or sincerely held moral convictions central to the hospital's operating principles, and the hospital would be permitted by law to refuse to honor the decision if made by such person, provided:

(i) the hospital has informed the guardian of such policy prior to or upon admission, if reasonably possible; and

(ii) the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** is transferred promptly to another hospital that is reasonably accessible under the circumstances and is willing to honor the guardian's decision. If the guardian is unable or unwilling to arrange such a transfer, the hospital's refusal to honor the decision of the guardian shall constitute an objection pursuant to subdivision five of this section.

(c) Notwithstanding paragraph (a) of this subdivision, nothing in this section shall be construed to require an individual health care provider to honor a guardian's health care decision that the individual would not

honor if the decision had been made by the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, if such person had capacity, because the decision is contrary to the individual's religious beliefs or sincerely held moral convictions, provided the individual health care provider promptly informs the guardian and the facility, if any, of [~~his or her~~] **their** refusal to honor the guardian's decision. In such event, the facility shall promptly transfer responsibility for the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** to another individual health care provider willing to honor the guardian's decision. The individual health care provider shall cooperate in facilitating such transfer of the patient.

(d) Notwithstanding the provisions of any other paragraph of this subdivision, if a guardian directs the provision of life-sustaining treatment, the denial of which in reasonable medical judgment would be likely to result in the death of the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury**, a hospital or individual health care provider that does not wish to provide such treatment shall nonetheless comply with the guardian's decision pending either transfer of the person [~~who is intellectually disabled~~] **with a developmental disability or traumatic brain injury** to a willing hospital or individual health care provider, or judicial review.

(e) Nothing in this section shall affect or diminish the authority of a surrogate decision-making panel to render decisions regarding major medical treatment pursuant to article eighty of the mental hygiene law.

8. Immunity. (a) Provider immunity. No health care provider or employee thereof shall be subjected to criminal or civil liability, or be deemed to have engaged in unprofessional conduct, for honoring reasonably and in good faith a health care decision by a guardian, or for other actions taken reasonably and in good faith pursuant to this section.

(b) Guardian immunity. No guardian shall be subjected to criminal or civil liability for making a health care decision reasonably and in good faith pursuant to this section.

§ 4. Section 1751 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1751. Petition for appointment; by whom made **and where**

1. A petition for the appointment of a guardian of the person or property, or both, [~~of a person who is intellectually disabled or a person who is developmentally disabled~~] may be made by a parent **of a person asserted to have a developmental disability or traumatic brain injury**, any [~~interested~~] person eighteen years of age or older on behalf of the [~~person who is intellectually disabled or a person who is developmentally disabled~~] **respondent,** including a corporation authorized to serve as a guardian as provided for by this article, or by the person who is [~~intellectually disabled or a person who is developmentally disabled~~] **asserted to have a developmental disability or traumatic brain injury** when such person is eighteen years of age or older.

2. A proceeding under this article shall be brought in the surrogate's court within the county in which the respondent resides. If the respondent is a resident in a residential facility, the residence of the respondent shall be deemed to be in the county where that facility is located.

§ 5. Section 1752 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016 and subdivision 3 as amended by chapter 420 of the laws of 2019, is amended to read as follows:

§ 1752. Petition for appointment; contents

The petition for the appointment of a guardian shall be filed with the court on forms to be prescribed by the [~~state~~] chief administrator of the courts. Such petition for a guardian of a [~~person who is intellectually disabled or a person who is developmentally disabled~~] respondent shall include, but not be limited to, the following information:

1. the full name, date of birth and residence of the [~~person who is intellectually disabled or a person who is developmentally disabled~~] respondent;

2. the name, age, address and relationship or interest of the petitioner to the [~~person who is intellectually disabled or a person who is developmentally disabled~~] respondent;

3. the names of the parents, children, adult siblings [~~if eighteen years of age or older~~], the spouse [~~and primary care physician if other than a physician having submitted a certification with the petition, if any, of the person who is intellectually disabled or a person who is developmentally disabled~~], if any, of the respondent, and whether or not they are living, and if living, their addresses and the names and addresses of the nearest [~~distributees~~] family members of full age who are domiciliaries, if both parents are [~~dead~~] deceased;

4. the name and address of the person with whom the [~~person who is intellectually disabled or a person who is developmentally disabled~~] respondent resides if other than the parents or spouse. If the respondent resides in a facility, the name and address of the facility;

5. the name, age, address, education and other qualifications, and consent of the proposed guardian, standby and alternate guardian[~~, if~~]. If petitioner is someone other than the parent, spouse, adult child [~~if eighteen years of age or older~~] or adult sibling [~~if eighteen years of age or older~~], and if such parent, spouse [~~or~~], adult child or adult sibling be living, why any of them should not be appointed guardian;

6. the estimated value of real and personal property and the annual income therefrom and any other income including governmental entitlements to which the [~~person who is intellectually disabled or person who is developmentally disabled~~] respondent is entitled; [~~and~~]

7. any circumstances which the court should consider in determining whether [~~it is in the best interests of the person who is intellectually disabled or person who is developmentally disabled to~~] the respondent should not be present at the hearing [~~if conducted~~];

8. a statement that the respondent has a developmental disability or traumatic brain injury, including the basis for same, and the nature and extent of the respondent's functional abilities; and

9. a statement of the alternatives to guardianship considered, including but not limited to the execution of a health care proxy, power of attorney, representative payee, care coordination and/or other social support services, or other supported or shared decision-making, and reasons for the declination of such alternatives.

§ 6. Section 1753 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1753. Persons to be served

1. Upon presentation of the petition, process shall issue to:

(a) the spouse, the parent or parents, and adult children and adult siblings, if the petitioner is other than a parent[~~, adult siblings, if the petitioner is other than a parent, and if the person who is intellectually disabled or person who is developmentally disabled is married, to the spouse, if their residences are known~~];

(b) the person [~~having~~] **providing** care [~~and custody of~~] **to** the [~~person who is intellectually disabled or person who is developmentally disabled~~] **respondent**, or with whom such person resides if other than the parents or spouse; and

(c) the [~~person who is intellectually disabled or person who is developmentally disabled if fourteen years of age or older for whom an application has been made in such person's behalf~~] **respondent**.

2. Upon presentation of the petition, notice of such petition shall be served by certified mail to:

(a) the adult siblings if the petitioner is a parent, and adult children if the petitioner is a parent;

(b) [~~the mental hygiene legal service in the judicial department where the facility, as defined in subdivision (a) of section 47.01 of the mental hygiene law, is located if the person who is intellectually disabled or person who is developmentally disabled resides in such a facility;~~

~~(c)~~] in all cases, to the director in charge of a facility licensed or operated by an agency of the state of New York, if the [~~person who is intellectually disabled or person who is developmentally disabled~~] **respondent** resides in such facility;

[~~(d) one other person~~] **(c) any other person or persons** if designated in writing by the [~~person who is intellectually disabled or person who is developmentally disabled~~] **respondent**; and

[~~(e)~~] **(d)** such other persons as the court may deem proper.

3. [~~No process or notice shall be necessary to a parent, adult child, adult sibling, or spouse of the person who is intellectually disabled or person who is developmentally disabled who has been declared by a court as being incompetent. In addition, no process or notice shall be necessary to a spouse who is divorced from the person who is intellectually disabled or person who is developmentally disabled, and to a parent, adult child, adult sibling when it shall appear to the satisfaction of the court that such person or persons have abandoned the person who is intellectually disabled or person who is developmentally disabled~~] **The court shall upon the issuance of a citation assign counsel for the respondent and shall provide said counsel with a copy of the petition and any supporting papers filed therein. Process or notice may be dispensed within the court's discretion**.

§ 7. Section 1754 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1754. Hearing and trial

1. Upon a petition for the appointment of a guardian of a [~~person who is intellectually disabled or person who is developmentally disabled eighteen years of age or older~~] **respondent**, the court shall conduct a hearing at which [~~such person~~] **the respondent** shall have the right to jury trial. The right to a jury trial shall be deemed waived by failure to make a demand therefor. [~~The court may in its discretion dispense with a hearing for the appointment of a guardian, and may in its discretion appoint a guardian ad litem, or the mental hygiene legal service if such person is a resident of a mental hygiene facility as defined in subdivision (a) of section 47.01 of the mental hygiene law, to recommend whether the appointment of a guardian as proposed in the application is in the best interest of the person who is intellectually disabled or person who is developmentally disabled, provided however, that such application has been made by:~~

~~(a) both parents or the survivor; or~~

~~(b) one parent and the consent of the other parent; or~~

~~(c) any interested party and the consent of each parent.~~

~~2. When it shall appear to the satisfaction of the court that a parent or parents not joining in or consenting to the application have abandoned the person who is intellectually disabled or person who is developmentally disabled or are not otherwise required to receive notice, the court may dispense with such parent's consent in determining the need to conduct a hearing for a person under the age of eighteen. However, if the consent of both parents or the surviving parent is dispensed with by the court, a hearing shall be held on the application.~~

~~3. If a hearing is conducted, the person who is intellectually disabled or person who is developmentally disabled~~]

2. (a) The court shall appoint mental hygiene legal services as counsel for the respondent unless it appoints other counsel. The court may also appoint a guardian ad litem for the respondent. Such assignments of counsel or guardian ad litem shall be implemented as provided in section four hundred seven of this act.

(b) If the respondent objects to having counsel, the court may, despite such objection, exercise its discretion to appoint counsel or a guardian ad litem. The respondent may proceed self-represented only with leave of the court.

3. The respondent's counsel or the guardian ad litem may:

(a) apply to the court for an order permitting the applicant to inspect the clinical records pertaining to the respondent in accordance with state and federal laws; and

(b) be allowed access to the respondent's clinical records without a court order as otherwise permitted by law.

4. At the scheduled hearing, the respondent shall be present unless it shall appear to the satisfaction of the court [~~on the certification of the certifying physician that the person who is intellectually disabled or person who is developmentally disabled is medically incapable of being present to the extent that attendance is likely to result in physical harm to such person who is intellectually disabled or person who is developmentally disabled, or under such other circumstances which the court finds would not be in the best interest of the person who is intellectually disabled or person who is developmentally disabled.~~

~~4. If either a hearing is dispensed with pursuant to subdivisions one and two of this section or the person who is intellectually disabled or person who is developmentally disabled is not present at the hearing pursuant to subdivision three of this section, the court may appoint a guardian ad litem if no mental hygiene legal service attorney is authorized to act on behalf of the person who is intellectually disabled or person who is developmentally disabled. The guardian ad litem or mental hygiene legal service attorney, if appointed, shall personally interview the person who is intellectually disabled or person who is developmentally disabled and shall submit a written report to the court~~] that the respondent's presence would result in harm to such person.

5. If, upon conclusion of [~~such hearing or jury trial or if none be held upon the application~~] the proceeding, the court is satisfied [~~that the best interests of the person who is intellectually disabled or person who is developmentally disabled will be promoted by the appointment of a guardian of the person or property, or both, it shall make a decree naming such person or persons to serve as such guardians~~] based on clear and convincing evidence that the respondent is incapable of managing their affairs, it shall make a decree appointing a guardian provided that guardianship shall be imposed only if necessary and in the

least restrictive manner specifically considering the respondent's functional abilities.

6. Where the court has determined that the respondent has certain decision-making capacity, the court shall appropriately limit the scope or duration of the guardianship it decrees.

§ 8. The surrogate's court procedure act is amended by adding a new section 1754-a to read as follows:

§ 1754-a. Decision-making standard

Decisions made by a guardian appointed hereunder shall be made in accordance with the following standards:

1. A guardian shall exercise authority only as necessary and shall encourage the person with a developmental disability or traumatic brain injury to participate in making decisions and to act on their own behalf.

2. When making decisions, a guardian shall consider the expressed desires and personal values of the person with a developmental disability or traumatic brain injury to the extent known, and shall consult such person.

3. If the person's wishes are unknown and remain unknown after reasonable efforts are made to discern them, the decision shall be made on the basis of the best interests of such person as determined by the guardian. In determining the best interests of such person, the guardian shall weigh the reason for and nature of the proposed action; the benefit or necessity of the action; the possible risks and other consequences of the proposed action; and any available alternatives and their risks, consequences and benefits. The guardian shall take into account any other information, including the views of family and friends that the guardian believes said person would have considered if able to act for themself.

§ 9. Section 1755 of the surrogate's court procedure act is REPEALED and a new section 1755 is added to read as follows:

§ 1755. Duration, modification and revocation

1. A guardianship established under this article shall remain in effect until modified or revoked by the court.

2. Any person for whom a guardian has been appointed pursuant to this article, or anyone, including the guardian, on behalf of such person may petition to the court to discharge the guardian and appoint a successor, to designate the guardian of the property as a limited guardian of the property, to appoint a spouse as stand-by guardian, or to otherwise modify or revoke the guardianship order. Upon the filing of such a petition, the court shall conduct a hearing and such review pursuant to section seventeen hundred fifty-four of this article. The court may modify or revoke a decree if it determines that the circumstances or needs of the person with a developmental disability or traumatic brain injury have changed and the provisions of the decree are no longer appropriate or necessary.

3. Any proceeding to modify or revoke a guardianship decree may be commenced in the surrogate's court which issued the decree, unless at the time of the petition to modify or revoke the decree the person with a developmental disability or traumatic brain injury resides in a different county, in which case the proceeding may be commenced in the county where the person with a developmental disability or traumatic brain injury resides.

§ 10. Section 1756 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1756. Limited guardian of the property

When it shall appear to the satisfaction of the court that [~~such person who is intellectually disabled or person who is developmentally disabled for whom an application for guardianship is made is eighteen years of age or older and~~] the respondent is wholly or substantially self-supporting by means of [~~his or her~~] wages or earnings from employment, the court is authorized and empowered to appoint a limited guardian of the property of [~~such person who is intellectually disabled or person who is developmentally disabled~~] the respondent who shall receive, manage, disburse and account for only such property of said person [~~who is intellectually disabled or person who is developmentally disabled~~] as shall be received from other than the wages or earnings of said person.

[~~The~~] Said person [~~who is intellectually disabled or person who is developmentally disabled~~] for whom a limited guardian of the property has been appointed shall have the right to receive and expend any and all wages or other earnings of [~~his or her~~] employment and shall have the power to contract or legally bind [~~himself or herself~~] themself for such sum of money not exceeding one month's wages or earnings from such employment or three hundred dollars, whichever is greater, or as otherwise authorized by the court.

§ 11. Section 1757 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1757. Standby guardian of a person [~~who is intellectually disabled or person who is developmentally disabled~~] with a developmental disability or traumatic brain injury

1. Upon application, a standby guardian of the person or property or both of a person [~~who is intellectually disabled or person who is developmentally disabled~~] with a developmental disability or traumatic brain injury may be appointed by the court. The court may also, upon application, appoint an alternate and/or successive alternates to such standby guardian, to act if such standby guardian shall die, or become incapacitated, or shall renounce. Such appointments by the court shall be made in accordance with the provisions of this article.

2. Such standby guardian, or alternate in the event of such standby guardian's death, incapacity or renunciation, shall without further proceedings be empowered to assume the duties of [~~his or her~~] office immediately upon death, renunciation or adjudication of incompetency of the guardian or standby guardian appointed pursuant to this article, subject only to confirmation of [~~his or her~~] the appointment by the court within one hundred eighty days following assumption of [~~his or her~~] the standby or alternate guardian's duties of such office. Before confirming the appointment of the standby guardian or alternate guardian, the court may conduct a hearing pursuant to section seventeen hundred fifty-four of this article upon petition by anyone on behalf of the person [~~who is intellectually disabled or person who is developmentally disabled~~] with a developmental disability or traumatic brain injury or the person [~~who is intellectually disabled or person who is developmentally disabled if such person is eighteen years of age or older~~] with a developmental disability or traumatic brain injury, or upon its discretion.

3. Failure of a standby or alternate standby guardian to assume the duties of guardian, seek court confirmation or to renounce the guardianship within sixty days of written notice by certified mail or personal delivery given by or on behalf of the person [~~who is intellectually disabled or person who is developmentally disabled~~] with a developmental disability or traumatic brain injury of a prior guardian's inability to

serve and the standby or alternate standby guardian's duty to serve, seek court confirmation or renounce such role shall allow the court to:

(a) deem the failure an implied renunciation of guardianship, and

(b) authorize, notwithstanding the time period provided for in subdivision two of this section to seek court confirmation, any remaining standby or alternate standby guardian to serve in such capacity provided (i) an application for confirmation and appropriate notices pursuant to subdivision one of section seventeen hundred fifty-three of this article are filed, or (ii) an application for modification of the guardianship order pursuant to section seventeen hundred fifty-five of this article is filed.

§ 12. Subdivision 2 of section 1758 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

2. After the appointment of a guardian, standby guardian or alternate guardians, the court shall have and retain general jurisdiction over the person [~~who is intellectually disabled or person who is developmentally disabled~~] **with a developmental disability or traumatic brain injury** for whom such guardian shall have been appointed, to take of its own motion or to entertain and adjudicate such steps and proceedings relating to such guardian, standby, or alternate guardianship as may be deemed necessary or proper for the welfare of such person [~~who is intellectually disabled or person who is developmentally disabled~~].

§ 13. Section 1759 of the surrogate's court procedure act is REPEALED.

§ 14. Section 1760 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1760. Corporate guardianship

No corporation may be appointed guardian of the person under the provisions of this article, except that a non-profit corporation organized and existing under the laws of the state of New York and having the corporate power to **so** act [~~as guardian of a person who is intellectually disabled or person who is developmentally disabled may be appointed as the guardian of the person only of such person who is intellectually disabled or person who is developmentally disabled~~] **may be appointed**.

§ 15. Section 1761 of the surrogate's court procedure act, as amended by chapter 198 of the laws of 2016, is amended to read as follows:

§ 1761. Application of other provisions

To the extent that the context thereof shall admit, the provisions of article seventeen of this act shall apply to all proceedings under this article [~~with the same force and effect as if an "infant", as therein referred to, were a "person who is intellectually disabled" or "person who is developmentally disabled" as herein defined, and a "guardian" as therein referred to were a "guardian of the person who is intellectually disabled" or a "guardian of a person who is developmentally disabled" as herein provided for~~].

§ 16. This act shall take effect on the first of January next succeeding the date on which it shall have become a law.