

**MINUTES OF THE JANUARY 29, 2018 MEETING
OF THE PROCEDURES REVIEW COMMITTEE**

The following were in attendance at the meeting: Hon. Jennifer Berkenstock, Chair; Hon. Diane Blick; Hon. Robert Randich; Gale Pellegren, *Chief Clerk Torrington Area Probate Court*; Susan Meagher, *Chief Clerk, Berlin Probate Court*; Lori Michalak, *Chief Clerk Shelton*; Probate Court Bonnie Bennet, *Probate Administration Legal Counsel*; Heather Dostaler, *Probate Administration Staff Attorney*; Dana Masullo, *Probate Administration IT Department*

The following were absent from the meeting: Hon. Chuck Norris; Hon. Daniel O'Grady; Hon. Peter Barrett; Hon. Philip Wright; *Alison Green, Probate Administration Staff Assistant*

Call to order: The meeting was called to order at 9:00 a.m.

Old Business: NONE

New Business:

In order to better coordinate with the IT Department, Procedure Review Committee meetings in 2018 will take place on the first Monday of each month, commencing March 5, 2018.

The meeting on February 26, 2018 has been cancelled.

The Committee reviewed, discussed and took action on new and revised forms as shown and evidenced on the attached schedule.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at 11:30 a.m.

Respectfully submitted,

Diane S. Blick

Hon. Diane S. Blick, Secretary

THE FEBRUARY MEETING HAS BEEN CANCELLED.

THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE

WILL BE ON MONDAY, MARCH 5, 2018 at 9:00 a.m.

IN THE LIBRARY AT PROBATE ADMINISTRATION

List of Forms for Consideration 1-29-18

PC #	P/C	Form Name	CMS	CMS Case Type	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action
200	P	Petition/Administration or Probate of Will			X	Remove language at bottom of page 2; Clarify list of heirs at top of page two; Provide more detail for the reason for declination of primary fiduciary, i.e., declined, died, other. State that if charity is a beneficiary, send copy of PC-200 and will to AG	01/29/18	Approved 1/29/18
250	P	Certificate of Devise, Descent, or Distribution	X		X	To allow forms to be signed electronically and sent automatically to LaserFiche, add "certified copy" language and space for court seal on all forms for the land records; discuss removing from website	01/29/18	Approved the changes to the form 1-29-18; table discussion of whether form should be removed from website
251	p	Notice for Land Records/Appointment of Fiduciary	X			To allow forms to be signed electronically and sent automatically to LaserFiche, add "certified copy" language and space for court seal on all forms for the land records	01/29/18	Approved 1/29/18
360	P	Decree/Appointment of Conservator	X			Clarify the finding that the respondent was located in the district when the petition was filed; make UAJPPA findings by clear and convincing evidence.	01/29/18	Approved 1/29/18
3620	P	Decree/Lack of Jurisdiction to Initiate Matter/Conservatorship; CHANGE TITLE: Decree/Lack of Jurisdiction to Initiate Involuntary Conservatorship	X			Add finding that respondent resides, is domiciled or was located in the district when the petition was filed; Change of title to: Decree/Lack of Jurisdiction to Initiate Involuntary Conservatorship	01/29/18	Approved 1/29/18

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3704	P	Acceptance of Appointment and Agreement of Conservator of Estate			X	Add reference to the standards of practice, random audit and training for conservators	11/27/2017;1/29/18	Approved 1/29/18
3705	P	Acceptance of Appointment and Agreement of Conservator of Person			X	Add reference to the standards of practice and training for conservators	11/27/2017;1/29/18	Approved 1/29/18
413B	P	Order Re Withdrawal of Funds	X			Modify form to provide for withdrawal of 1) portion of funds or 2) all funds and authorize fiduciary to close account	01/29/18	Approved 1/29/18
440	P	Inventory				Change instructions re reporting value of trust assets; change instructions re: guardian of estate of minor; add GOE to last section requesting information regarding survivorship property, etc.	01/29/18	Approved 1-29-18 but Add reference to GOE to the form; PCA to make necessary changes discussed
461	P	Decree: Interim Account; CHANGE TITLE of form: Decree/Periodic Account (Non-Decedent)	X			Change " interim" to "periodic" on all relevant accounting forms, including change of title; on this and all forms where interim is used: AG to check this	01/29/18	Change non - decedent account/financial report forms and activities from interim to periodic
463	p	Decree Settling Doubtful or Disputed Claim	X			Provide for the option to settlement of multiple claims on one decree; add language re structured settlements; require executed bond or restriction on assets	01/29/18	Approved 1/29/18
503A	P	Petition Appointment of GOE and Compromise of Claim			X	New Format; include instructions re Rule 34.5 (PC-503A revised 11/29/17)	01/29/18	Approved 1/29/18
601	P/C	Petition/Consent TPR and Stepparent, Co-Parent			X	Add statement of facts and request for court appointing guardian on page 2.	01/29/18	Approved 1/29/18
603	P/C	Application/Adoption; New TITLE: Petition/Adoption			X	New TITLE Format and instructions; New Confidential Information Sheet for Adoption Petition	01/29/18	Approved 1/29/18

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680	P/C	Adoption Data Sheet			X	New Format and add space for dates of birth of adoptive parents ; Further discussion necessary re: term "genetic parent".	01/29/18	Tabled for further discussion re genetic parents
704	P/C	Request/Return _DDS Professional or Assessment Team Evaluation; Change of Name: Request/Return _DDS Professional or Assessment Team Report	X			Change title of form and modify language to be consistent with change to PC-770 and PC-770A re: Assessment Team Report	01/29/18	Approved 1/29/18
734	C	Notice Regarding the Assessment Team Evaluation in Guardianship of Persons with Intellectual Disability	X			Modify language to be consistent with change to PC-770 and PC-770A re: Assessment Team Report	01/29/18	Approved 1/29/18
702	P/C	Petition/Sterilization of Adult			X	Reference rather than list factors under 45a-690 (4); new format with instructions	01/29/18	Approved 1/29/18
732	P/C	Citation and Return/Sterilization of Adult	X			Simplify form, revise notice to respondent and make available as CMS-generated document	01/29/18	Approved 1/29/18
762	P/C	Decree/Sterilization of Adult	X			Revise and make available as CMS-generated document	01/29/18	Approved 1/29/18