

**Minutes of the October 30, 2017 Meeting
of the Procedures Review Committee**

The following were in attendance at the meeting: Hon. Charles Norris; Hon. Philip Wright; Hon. Jennifer Birkenstock; Susan Meagher, Chief Clerk Berlin Probate Court; Lori Michalak, Chief Clerk Shelton Probate Court; Gale Pellegren, Chief Clerk Torrington Area Probate Court; Bonnie Bennet, Probate Administration Legal Counsel; Heather Dostaler, Probate Administration Staff Attorney; Alison Green, Probate Administration Staff Assistant; Dana Masullo, Probate Administration Help Desk Analyst; and Deanna McWeeney, Probate Administration Intern.

The following were absent from the meeting: Hon. Diane S. Blick; Hon. Peter Barrett; Hon. Robert Randich; and Hon. Daniel O'Grady.

Call to order: The meeting was called to order at 9:05 a.m.

Old Business: None

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

The committee will meet again as scheduled on November 27, 2017.

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

Respectfully submitted,

Loreen Michalak

Loreen (Lori) Michalak

**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON
MONDAY, NOVEMBER 27, 2017 AT 9:00am
IN THE LIBRARY AT PROBATE ADMINISTRATION**

List of Forms for Consideration 10-30-17

P/C #	P/C	Form Name	CMS	CMS Case Type	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
700	P/C	Petition/Guardianship of Person with Intellectual Disability			X	A separate petition has been created to request authority to manage finances up to \$10,000 per P.A. 17-136, section 18, effective 1-1-18; no revision to the PC-700 is needed at this time.	9/11/2017; 10/30/17	Approved 9-11-17; but no changes needed since there will be a separate petition for authority to manage finances
760	P/C	Decree/Appointment of Guardian of Person with Intellectual Disability	X			Revise form to identify findings required by clear and convincing evidence. (A separate petition/decre is needed to grant authority to manage finances up to \$10,000, per P.A. 17-136, section 18 effective 1-1-18 so language considered on 9/11/17 was removed.)	9/11/2017; 10/30/17	Approved 9-11-17; Revisions approved 10-30-17
7608	P/C	Decree/Authority of Guardian to Manage Funds of Protected Person	X			New decree re: authorization to manage finances up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18; further revisions in accordance with P.A. brought to committee 10/30/17	9/11/2017; 10/30/17	Approved 9-11-17; Revisions approved 10-30-17
450	PC	Fiduciary's Certificate/Guardian of Person with Intellectual Disability	X			Revise to list all authorities granted to GID, including reference to management of finances, if applicable	10/30/17	Approved 10-30-17

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770	P/C	Assessment Team Evaluation/Guardianship of Person with Intellectual Disability; NEW Title: Assessment Team Report/ Guardianship of Person with Intellectual Disability			X	New title and format with instructions; Add "Is the protected person functioning adaptively and intellectually within the severe or profound range of intellectual disability?"; Add request for information re ability to manage finances up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18; Further revisions in response to feedback from DDS	9/11/2017; 10/30/17	Approved 9-11-17; Revisions approved 10-30-17
770A	P/C	DDS Professional or Assessment Team Evaluation: Guardianship of Person with Intellectual Disability; New Title: DDS Professional or Assessment Team Report/ Guardianship of Person with Intellectual Disability			X	New title and format with instructions; Add request for information re ability to manage funds up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18; Further revisions in response to feedback from DDS	9/11/2017; 10/30/17	Approved 9-11-17; Revisions approved 10-30-17
771	P/C	Guardian's Report/Guardianship of Person with Intellectual Disability			X	New format with instructions.	10/30/17	Approved 10-30-17
151	P	Certification/ Mailing Document by Party			X	For information only: Need to revise forms to permit fiduciary <u>or attorney</u> to sign certification of mailing for all forms with certification of mailing by party similar to the PC-440, Inventory: Changes needed to PC-241, PC-242, PC-286, PC-2017	10/30/17	Approved 10-30-17
610	P/C	Affidavit/Temporary Custody, Removal, Termination, or Adoption; Title changed to Affidavit/Custody of Minor Child	X			New title: Affidavit/Custody of Minor Child; New format; Add reference to Temporary Guardianship; provide space for statement if proceedings in another court.	10/30/2017; Approved 10-30-17	Approved 10-30-17

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620	P/C	Order of Notice/Temporary Custody, Termination, Appointment of Statutory Parent or Guardian and/or Adoption	X			Add the option of termination and affirmation of appointment of court-appointed guardian	10/30/17	Approved 10-30-17
603A	P/C	Petition and Agreement of Adult Adoption			X	Clarify language regarding the relationship of the person being adopted to the proposed adoptive parent	10/30/17	Approved 10-30-17
663A	P/C	Decree/Adult Adoption	X			Clarify language regarding the relationship of the person being adopted to the proposed adoptive parent	10/30/17	Approved 10-30-17
2106	P	Affidavit of Landlord				New form pursuant to P.A. 17-22, effective October 1, 2017	10/30/17	Approved 10-30-17
2406	P	Inventory by Landlord				New form pursuant to P.A. 17-22, effective October 1, 2017	10/30/17	Approved 10-30-17
213	P	Affidavit of Closing NEW Title			X	Change title and instructions to make generic for any estate; Name change, deleting "of the estate".)	10/30/17	Approved 10-30-17
PC-8/9						Discussion of purpose of this form and alternative procedures for notifying DAS of appointment of fiduciary; conclusion: add state as interested party if state aid indicated on the PC-200	10/30/17	Approved 10-30-17
PC-4201	P	Order of Notice/Right to Request a Hearing/Sale or Mortgage of Real Property	X			New order of notice for streamline procedure re: sale or mortgage of real property to include address, price and name of proposed buyer	10/30/17	Approved 10-30-17
PC-4302		Notice of Petition for Sale or Mortgage of Real Property	X			New streamline notice for sale or mortgage of real property to include address, price and name of proposed buyer	10/30/17	Approved 10-30-17

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236 A-E		Streamline Notices A-E				Add clerk's signature to streamline notices as part of a future review of the streamline notices	10/30/17	
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