

**Minutes of the November 28, 2016 Meeting
of the Procedures Review Committee**

The following were in attendance at the meeting: Hon. Peter Barrett; Hon. Jennifer Berkenstock, Chair; Hon. Robert Randich; Hon. Philip Wright; 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. Also participating in the meeting via telephone: Amy Benjamin, Probate Administration Manager of Staff Training & Support.

The following were absent from the meeting: Hon. Diane S. Blick and Hon. Charles Norris.

Call to order: The meeting was called to order at 9:10 a.m.

Old Business: None

New Business: Sally Canzanella, Chief Clerk East Hartford Probate Court resigned from the committee. The Committee welcomed two new members; Susan Meagher, Chief Clerk of the Berlin Probate Court; and Gale Pellegren, Chief Clerk of the Torrington Area Probate Court.

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

The December meeting will be cancelled. The committee will resume its work as scheduled on January 30, 2017.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at 11:50 a.m.

Respectfully submitted,

Loreen Michalak

Loreen (Lori) Michalak

The December 26, 2016 meeting is cancelled

THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON

MONDAY, JANUARY 30, 2017 AT 9:00 A.M.

IN THE LIBRARY AT PROBATE ADMINISTRATION

List of Forms for Consideration 11-28-16

PC#/old CM #	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
520	Order of Notice Temporary Custody/ Removal and Appointment of Guardian	X		Make clear that petition and documents required by C.G.S. section 45a-609 & 45a-610 must be served on child and parents and sent to parents who are out of state	11/28/16	Approved 11/28/16
600	Petition/Termination of Parental Rights		X	Add "Other" to acts of omission and commission and create space for statement of facts in body of petition. Change instructions re: statement of facts.	11/28/16	Approved 11/28/16
3013	Petition to Excuse Account/Title XIX Eligibility/Terminate Conservator of Estate		X	Create a new form for the petition referenced in Probate Court Rules 33.17.	7/28/2014 11/28/16	ON 1/26/15 agenda; Approved 11/28/16
362A	Order/Review Proceeding re: Appointment of Conservator (No Hearing) NEW TITLE: Decree/Review (No Hearing) Appointment of Conservator	X		45a-660 (c) requires copies of reports be sent to conserved person; title of form: Order or Decree. See PC-763A Change title to Decree/Review (No Hearing) Appointment of Conservator	11/28/16	Approved 11/28/16 with title change
322	Order of Notice of Hearing/ Appoint of Conservator/Review Hearing	X		Change mail notice to conserved person and conserved person's attorney and spouse from certified mail to first class	11/28/16	Approved 11/28/16
332	Notice of Hearing/Appointment of Conservator/Review Hearing	X		Current language has been on form since before the 2007 revisions to conservatorship statutes. Discussion re:need to simplify but still provide information about possible modification of conservator's authority; Revisions to be presented at next meeting	11/28/16	Tabled to 1/30/17

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763A	Decree/Review of GID/No hearing	X		Review requirement that copies of report be sent to protected person; Committee determined to remove reference to protected person to be consistent with statute.	11/28/16	Approved 11/28/16 with edit re: removal of requirement that copy of reports be sent to protected person
722	Order of Notice of hearing and return/appointment of GID/Review Hearing	X		Remove reference to certified mail notice to protected person and protected person's attorney and change reference from regular mail to 1st class mail.	11/28/16	Approved 11/28/16
269	Decree/Access to Safe Deposit Box to Obtain Will		X	Suggestion: add a box to Return of Bank Officer that box was empty	11/28/16	No action taken
3800	Appointment of Psychiatrist/Voluntary Admission to Psychiatric Hospital by Person Under Conservatorship	X		New form for appointment of Psychiatrist/Voluntary Admission by person under conservatorship	11/28/16	Approved 11/28/16
207	Petition/Estate Examiner for Limited Purpose		X	New Format and edits, including space to identify financial institutions to determine whether full estate administration is necessary	11/28/16	Approved 11/28/16
267	Decree/Estate Examiner for Limited Purpose	X		Add text boxes for authority to obtain financial and/or medical info	11/28/16	Approved 11/28/16
301	Petition for Voluntary Representation by Conservator		X	Review and update; discussion of need for birth date of proposed conservator discussed and tabled.	11/28/16	Approved 11/28/16
321	Order of Notice/Appointment of Conservator/Voluntary Representation	X		Review and minor edits	11/28/16	Approved 11/28/16
361	Decree/Appointment of Conservator/Voluntary Representation	X		Review and update. Add list of powers and authorities of conservator consistent with the statute, similar to the PC-360.	11/28/16	Approved 11/28/16