

STATISTICS COMMITTEE

December 8, 2017

Newington Probate Court

The meeting was called to order at 10:00 A.M.

Present: Judge Chadwick; Judge Dorval; Chair; Judge McGrath, Secretary; Judge Wright; Judge Daly; Attorney Evan Brunetti, Chief Clerk, Farmington; Chief Clerk Lori Errico, West Hartford; Attorney Bonnie Bennet, PCA Staff.

The Committee approved the minutes of the October 13, 2017 meeting as presented.

The Committee discussed several comments and suggestions made by Judge Greene concerning the use of the WWL system. Judge Greene suggested that the WWL measure the activity of the staff in processing court work if it is to be used solely for staffing purposes – rather than the difficulty of the matter from a judge’s perspective. He commented that the current system is overly complicated and confusing. He recommends adopting a system that measures the number of general activities a court undertakes, such as the number of new applications; contested hearings, etc. The committee discussed these observations.

The Committee continued its review of the tally activities focusing on new items and reviewing changes that have been made during the initial review. The committee has concluded its initial review and revision of the tally form.

The committee will continue its discussion of the allocation of the tally points in children’s court matters, specifically whether the points are assigned to the court from which the case originates or in the court of the judge who hears the case.

Judge McGrath raised the issue of the additional clerk work involved when a judge accepts a citation to hear a matter from another court. The committee agreed to assign 1 point to the court of the cited judge upon acceptance of a citation.

Finally there was a discussion of whether the committee should apply points in excess of the 10 point scale for certain types of matters, including conservatorships. This discussion will be continued at the next meeting.

The next committee meeting will be held January 26, 2018 at PCA, West Hartford at 10:00 a.m.

The meeting adjourned at 12:00 pm.

Submitted by J. McGrath, Secretary

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
<b>Fee Waivers</b>				
Fee Waiver		Y	.5	2
<b>Decedent Estates</b>				
<b>Decedent Regular Estates</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Administration Intestate	Only the first one counts.	Y	3	6
Administrative Closing		Y	0	2
Admit Will	Only the first one counts.	Y	3	6
Admit Will, Administration having been Granted		Y	2	4
Affidavit of Closing with Hearing		Y	0	3
Allowance for Spouse or Family		Y	2	4
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Final Account of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Ancillary Administration		Y	3	6
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	5
Appointment of Trustee of Missing Person	Inactive in Decedent Regular Estates.	Y	2	N/A
Approval of Affidavit in Lieu of Administration to Settle Estate	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Approval of Fees	This activity will not count if petition is heard in conjunction with an accounting, financial report or CO-17.	Y	2	4
Approval of Mutual Distribution Agreement		Y	2	4
Approval of Statement of No Assets to Settle Estate		Y	4	3
Articulation		Y	0	2
Ascertainment of Heirs	The activity will not count if it is heard in conjunction with petition on Administration, Probate of Will or account/financial report.	Y	2	4
Certificate Releasing Liens	Only if no estate tax return filed	Y	0	2
Claim by Fiduciary		Y	3	5
Closure for Dormancy		Y	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Compel Account by Party		Y	2	3
Compel Account on Court's Own Motion	<del>Inactive.</del> <b>Activate Activity</b>	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Compromise of Claim		Y	3	6
Construe Will		Y	3	6
Contempt	<b>Civil contempt only</b>	Y	2	6
CT-706 NT	<del>Only the first return counts.</del>	N	1	3
<b>CT-706 NT Amendment (New)</b>				1
CT-706/709	<del>Only the first return counts.</del>	N	1	3
<b>CT-706/709 Amendment (New)</b>				1
Cy Pres		Y	3	6
Determination of Claims Presented to Prior Fiduciary		Y	1	4
Determination of Domicile on DRS Motion		Y	3	6
Disclaimer by Fiduciary <b>on behalf of the Estate</b>		Y	1	3
Disclosure of Estate/Succession Tax Return		Y	3	5
Disclosure of Medical Information		Y	3	6
Discovery Motion	<del>Does not count in Will Contests.</del>	Y	2	4
Distribute Exempt Property to Spouse (Insolvent Estate)		Y	1	3
Establish Trust	Appointment of Testamentary Trustee is under case type TT.	Y	3	6
Excuse Account of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	3	4
Extend Claims Period		Y	2	4
Extension of Time For Filing Form CT-706 NT		N	0	1
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Hearing Management Conference		Y	3	6
Hearing on Disallowed Claim		Y	3	7
Inoperative Trust		Y	0	2
Insolvent Estate <b>with claims procedure</b>		Y	3	7
<b>Insolvent Estate without claims procedure (New)</b>				4
Insolvent Estate Hearing on Fiduciary Report		Y	3	2
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Objection to Inventory	This activity will not count if it is heard in conjunction with a final financial report or final account.	Y	3	6
Objection to Succession Tax Assessment		Y	3	6
Order for Examination of Estate by Surety or Other Person		Y	2	4
Partial Distribution without Account		Y	3	5
Partition/Sale of Undivided Interest		Y	3	6
Permission to List Real Estate	Approval of Action by Fiduciary	Y	0	
Presumption of Death	Not separate motion – part of petition for administration	Y	1	
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Will		Y	3	6
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal for Failure to File Documents (CMS) NEW				
Re-Open Estate for Appointment of Successor Fiduciary	See Appointment of Successor Fiduciary	Y	1	
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Revoke Decree Admitting Will and Admit Later Will		Y	2	4
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Temporary Administration		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Will Contest	With evidentiary hearing	Y	5	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
<b>Decedent Estate Affidavit and TPO</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Affidavit Estate	The first Affidavit Estate counts as 2. Supplemental Estate Affidavit counts as 1.	Y	2	5
Allowance for Spouse or Family		Y	2	4
Articulation		Y	0	2
Certificate Releasing Liens		Y	0	2
CT-706 NT	<del>Only the first return counts.</del>	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	<del>Only the first return counts.</del>	N	1	3
CT-706/709 Amendment (New)				1
Disclosure of Estate/Succession Tax Return		Y	3	5
Extension of Time For Filing Form CT-706 NT		N	0	1
Objection	User must enter subject of objection.	N	0	2
Objection to Succession Tax Assessment		Y	3	6
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Supplemental Estate Affidavit		Y	1	2
Unseal File		Y	3	6
<b>Decedent Estates Tax Purposes Only</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Articulation		Y	0	2
Certificate Releasing Liens		Y	0	2
CT-706 NT	<del>Only the first return counts.</del>	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	<del>Only the first return counts.</del>	N	1	3
CT-706/709 Amendment (New)				1
Disclosure of Estate/Succession Tax Return		Y	3	5
Extension of Time For Filing Form CT-706 NT		N	0	2
Objection	User must enter subject of objection.	N	0	2
Objection to Succession Tax Assessment		Y	3	6
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Status Conference	User must enter subject of conference.	Y	2	4
TPO Estate		Y	0	0
<b>Decedent Estate 4a-16 Case</b>				
4a-16 Petition		Y	0	2
Status Conference	User must enter subject of conference.	Y	2	4
<b>Decedent Estate Will for Filing Only</b>				

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Affidavit and Will are entered as form received.		Y	0	1
<b>Decedent General</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Access to Jointly-Owned Assets in Safe Deposit Box		Y	3	6
Access To Safe Deposit Box to Obtain Will/Cemetery Deed		Y	0	2
Articulation		Y	0	2
Custody of Remains	Replaces both 'Custody of Remains by Official Designated by Statute with Notice/Hearing' and 'Custody of Remains by Relative or Designated Person with Notice/Hearing'.	Y	1	4
Estate Examiner for Limited Purposes		Y	2	4
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Unseal File		Y	3	6
<b>Trusts</b>				
<b>Testamentary Trust</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Appointment of Testamentary Trustee		Y	2	3
Appointment of Trustee of Missing Person	Removed from Testamentary Trust; In TO			

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces Advice/Approval of Action by Fiduciary	Y	2	5
Approval of Fees	This activity will not count if heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> Activate Activity	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
Establish Trust		Y	3	6
Excuse Final Account of Trustee	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 6.	Y	3 or 4	5 or 6
Final Account	Additional accounts/financial reports for the same time period are excluded. f INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	
Pro Hac Vice		Y	0	2
Purchase Property	Covered by Approve/Instruction re: Action by Fiduciary	Y	3	-
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal for Failure to File Documents CMS (New)				3
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if heard in conjunction with appointment of fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2
<b>Trust – CASE TYPE NO LONGER ACTIVE</b>				
Action on Probate Bond		Y	5	
Administrative Closing		Y	0	

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Affidavit of Closing with Hearing		Y	0	
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	
Appointment of GAL on Petition of Party		Y	1	
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	
Appointment of Trustee of Missing Person		Y	2	
Appointment of Trustee to Fill Vacancy		Y	1	
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	
Articulation		Y	0	
Compel Account by Party		Y	2	
Compel Account on Court's Own Motion	Inactive.	Y	0	
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	
Construe Trust		Y	3	
Contempt		Y	2	
Cy-Pres		Y	3	
Disclaimer by Fiduciary		Y	1	
Disclosure of Medical Information		Y	3	
Discovery Motion		Y	2	
Division of Trust		Y	3	
Enforcement of Pet Trust		Y	3	
Establish Trust		Y	3	
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Hearing Management Conference		Y	3	
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Mediation		Y	0	
Mortgage of Real Estate		Y	3	
News Media Coverage		Y	3	
Objection	User must enter subject of objection.	N	0	
Order for Examination of Estate by Surety or Other Person		Y	2	
Permission to List Real Estate		Y	0	
Pro Hac Vice		Y	0	
Purchase Property		Y	3	
Reconsider, Modify, Revoke Court Order		Y	3	
Recusal with Hearing		Y	4	
Reformation of Trust		Y	3	
Reimburse Probate Fee from Estate		Y	3	
Release of Certificate of Surety		Y	0	
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	
Removal of Fiduciary		Y	3	
Removal of Fiduciary on Court's Own Motion		Y	3	
Request for Reduction/Release of Bond		Y	0	
Resignation of Fiduciary and Appointment of Successor		Y	1	
Sale of Personal Property		Y	3	
Sale of Real Estate		Y	3	
Seal File		Y	3	
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Status Conference	User must enter subject of conference.	Y	2	
Stay		Y	3	
Substitution of New Bond		Y	1	
Summon to Appear and Give Testimony		Y	3	
Termination of Charitable Trust		Y	3	
Termination of Small Trust		Y	3	
Try Title		Y	3	
Unseal File		Y	3	
<b>Trust Living</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
<del>Appointment of Trustee of Missing Person</del>	<del>Removed from Trust Living; In TO</del>			
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary	Y	2	5
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party		Y	2	4
Compel Account for Inter Vivos Trust	Same as Compel Account by Party	Y	3	-
Compel Account on Court's Own Motion	Inactive- Activate Activity	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
<b>Establish Trust</b>	<b>Remove Trust Living; In TO</b>			
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
<del>Permission to List Real Estate</del>		<del>Y</del>	<del>0</del>	<del>-</del>
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2
<b>Trust Other</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Appointment of Trustee of Missing Person		Y	2	4
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	5

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> <b>Activate Activity</b>	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
Establish Trust		Y	3	6
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is <b>greater than 5 million dollars, then the point value will be 8.</b>	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is <b>greater than 5 million dollars, then the point value will be 6.</b>	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is <b>greater than 5 million dollars, then the point value will be 8.</b>	Y	3 or 4	7 or 8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is <b>greater than 5 million dollars, then the point value will be 8.</b>	Y	3 or 4	7 or 8
Mediation		Y	0	<b>2</b>
Mortgage of Real Estate		Y	3	6
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	-
Pro Hac Vice		Y	0	2
Purchase Property	Covered by Approve/Instruction re: Action by Fiduciary	Y	3	-
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal for Failure to File Documents (CMS) NEW				3
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Trust Created by a Non-Domiciliary, 45a-477		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2
<b>Conservators</b>				
<b>Conservatorship of Person Involuntary</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Administrative Closing		Y	0	2
Appointment of Co-Conservator	This activity does not count if heard in conjunction with appointment of conservator.	Y	2	5

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Conservator of the Person – Involuntary		Y	5	10*
Appointment of Conservator of the Person – Involuntary for the Sole Purpose of Psychiatric Medication	New Activity			10*
Appointment of GAL on Petition of Party		Y	1	4
Appointment of New Counsel with Hearing		Y	2	4
Appointment of Successor Fiduciary Conservator of the Person	Replaces ‘Appointment of Successor for Deceased Fiduciary’.	Y	3	6
Appointment of Temporary Conservator	Inactive.	Y	3	-
Appointment of Temporary Conservator of Person – Involuntary	New 10/1/16. Replaces ‘Appointment of Temporary Conservator’.	Y	3	10*
Appointment of Temporary Conservator Ex Parte	Inactive.	Y	2	-
Appointment of Temporary Conservator of Person Ex Parte – Involuntary	New 10/1/16. Replaces ‘Appointment of Temporary Conservator Ex Parte’.	Y	2	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces ‘Advice/Approval of Action by Fiduciary’.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Authority to Consent to Psychiatric Medication Treatment 17a-543(e)		Y	5	9
Change in DNR Order		Y	3	7
Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities	Y	2	6
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Competency to Vote		Y	3	6
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement or Change of Residence		Y	2	6
Contempt		Y	2	6
Court Review Re: Care of Conserved Person		Y	3	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: Health Care Decisions/Health Care Representatives		Y	5	9
Habeas Corpus		Y	5	10
Hearing Management Conference		Y	3	6
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator	Inactive.	Y	3	-
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator of Person – Involuntary		Y	3	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Life Support System		Y	5	10
Mediation		Y	0	2
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
One Year Review - No Hearing		Y	2	6
One Year Review Hearing		Y	2	8
Pro Hac Vice		Y	0	2
Provisional Order Accepting Transfer of Conservatorship from Other State		Y	3	6
Provisional Order of Transfer of Conservatorship to Other State		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
<b>Removal for Failure to File Documents (CMS) New</b>			-	4
<del>Resignation of Conservator and Appointment of Successor</del>	Inactive.	Y	3	
Resignation of Conservator of Person and Appointment of Successor	New 10/1/16. Replaces 'Resignation of Conservator of Person and Appointment of Successor.	Y	3	6
Restoration		Y	3	7
Seal File		Y	3	6
<del>Sell or Dispose Household Furnishings</del>	Combined into new activity	Y	2	-
Special Limited Conservator		Y	5	10
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Sterilization		Y	5	10
Summon to Appear and Give Testimony		Y	3	6
<del>Terminate Lease</del>	Combined into new activity	Y	2	-
Three Year Review - Hearing		Y	2	8
Three Year Review - No Hearing		Y	2	6
Transfer to Another Probate Court		Y	0	4
Unseal File		Y	3	6
Voluntary Admission by Conserved Person		Y	3	6
<b>Conservatorship of Person Voluntary</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Administrative Closing		Y	0	2
Appointment of Co-Conservator	This activity does not count if heard in conjunction with appointment of conservator.	Y	2	5
Appointment of Conservator of the Person - Voluntary		Y	3	7

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Successor Fiduciary – Conservator of the Person	Replaces ‘Appointment of Successor for Deceased Fiduciary’.	Y	3	6
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces ‘Advice/Approval of Action by Fiduciary’.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Change in DNR Order		Y	3	7
Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities	Y	2	6
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement or Change of Residence		Y	2	6
Contempt		Y	2	6
Court Review Re: Care of Conserved Person		Y	3	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: Health Care Decisions/Health Care Representatives		Y	5	9
Hearing Management Conference		Y	3	6
Life Support System		Y	5	10
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Release from Voluntary Representation (New activity)			0	3
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
Removal for Failure to File Documents (CMS) NEW			-	4
<del>Resignation of Conservator and Appointment of Successor</del>	Inactive.	Y	3	-
Resignation of Conservator of Person and Appointment of Successor	New 10/1/16. Replaces ‘Resignation of Conservator and Appointment of Successor.’	Y	3	7
Seal File		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Sell or Dispose Household Furnishings	Combined into new activity	Y	-	-
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Terminate Lease	Combined into new activity	Y	2	-
Transfer to Another Probate Court		Y	0	4
Unseal File		Y	3	6
Voluntary Admission by Conserved Person			3	6
<b>Conservatorship of Estate - Involuntary</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Appointment of Co-Conservator of Estate	This does not count if heard in conjunction with appointment of conservator.	Y	2	5
Appointment of Conservator of Nonresident's Property		Y	3	7
Appointment of Conservator of the Estate – Involuntary		Y	5	10*
Appointment of GAL on Petition of Party		Y	1	4
Appointment of New Counsel with Hearing		Y	2	4
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	3	6
Appointment of Temporary Conservator	Inactive.	✗	3	-
Appointment of Temporary Conservator of Estate – Involuntary	New 10/1/16. Replaces 'Appointment of Temporary Conservator'.	Y	3	9
Appointment of Temporary Conservator Ex Parte	Inactive.	✗	2	
Appointment of Temporary Conservator of Estate Ex Parte – Involuntary	New 10/1/16. Replaces 'Appointment of Temporary Conservator Ex Parte	Y	2	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities	Y	2	6
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	Inactive. Activate Activity	Y	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Compromise of Claim		Y	3	6
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement or Change of Residence		Y	2	6
Contempt		Y	2	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Distribute Gifts of Income or Principal		Y	3	6
Election of Spousal Share by Conservator		Y	2	4
Establish Trust		Y	3	8
Excuse Account - Title XIX recipient	Additional accounts/financial reports for the same time period are excluded.	Y	4	4
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Habeas Corpus		Y	5	10
Hearing Management Conference		Y	3	6
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator	Inactive.	N	3	-
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator of Estate – Involuntary	New 10/1/16. Replaces Hearing to Confirm or Revoke Ex Parte Appointment of Conservator	Y	3	8
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Joint Assets and Liabilities		Y	3	7
Liquidate Structured Settlement (NEW)			0	6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
One Year Review - No Hearing		Y	2	6
One Year Review Hearing		Y	2	8
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	2	6
Pro Hac Vice		Y	0	2
Provisional Order Accepting Transfer of Conservatorship from Other State		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Provisional Order of Transfer of Conservatorship to Other State		Y	3	6
Purchase Real Estate		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reimburse Probate Fee from Estate		Y	3	4
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2/5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
<b>Removal for Failure to File Documents (CMS) NEW</b>				4
Request for Reduction/Release of Bond		Y	0	2
<del>Resignation of Conservator and Appointment of Successor</del>	Inactive.	Y	3	-
Resignation of Conservator of Estate and Appointment of Successor	New 10/1/16. Replaces 'Resignation of Conservator and Appointment of Successor'.	Y	3	7
Restoration		Y	3	7
Sale of Personal Property		Y	2	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
<del>Sell or Dispose Household Furnishings</del>	Combined into new activity	✗	2	-
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Support Allowance		Y	2	5
<del>Terminate Lease</del>	Combined into new activity	✗	2	-
Three Year Review - Hearing		Y	2	8
Three Year Review - No Hearing		Y	2	6
Transfer to Another Probate Court		Y	0	4
Try Title		Y	3	6
Unseal File		Y	3	6
<b>Conservator of Estate - Voluntary</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Co-Conservator of Estate	This does not count if heard in conjunction with appointment of conservator.	Y	2	5
Appointment of Conservator of the Estate – Voluntary		Y	3	6
Appointment of Successor Fiduciary	Replaces ‘Appointment of Successor for Deceased Fiduciary’.	Y	3	6
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces ‘Advice/Approval of Action by Fiduciary’.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities			6
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	Inactive. Activate Activity	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Compromise of Claim		Y	3	6
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement or Change of Residence		Y	2	6
Contempt		Y	2	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Distribute Gifts of Income or Principal		Y	3	6
Election of Spousal Share by Conservator		Y	2	4
Establish Trust		Y	3	8
Excuse Account - Title XIX recipient	Additional accounts/financial reports for the same time period are excluded.	Y	4	4
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Joint Assets and Liabilities		Y	3	7
Liquidate Structured Settlement (New)			0	6
Mediation		Y	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Mortgage of Real Estate		Y	3	6
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	2	6
Pro Hac Vice		Y	0	2
Purchase Real Estate		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
<b>Release from Voluntary Representation (New Activity)</b>			0	3
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
Removal for Failure to File Documents (CMS)				4
Request for Reduction/Release of Bond		Y	0	2
Resignation of Conservator and Appointment of Successor	Inactive.	Y	3	-
Resignation of Conservator of Estate and Appointment of Successor	New 10/1/16. Replaces 'Resignation of Conservator and Appointment of Successor'.	Y	3	7
Sale of Personal Property		Y	2	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
<del>Sell or Dispose Household Furnishings</del>	Combined into new activity	Y	2	-
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Support Allowance		Y	2	5
<del>Terminate Lease</del>	Combined into new activity	Y	2	-
Transfer to Another Probate Court		Y	0	4
Try Title		Y	3	6
Unseal File		Y	3	6
<b>Conservatorship of Person and Estate – Involuntary</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Appointment of Co-Conservator	This does not count if heard in conjunction with appointment of conservator.	Y	2	5
Appointment of Conservator of Nonresident's Property		Y	3	7
Appointment of Conservator of Person and Estate - Involuntary		Y	5	10*
Appointment of GAL on Petition of Party		Y	1	4
Appointment of New Counsel with Hearing		Y	2	4
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	3	6
<del>Appointment of Temporary Conservator</del>	Inactive.	<del>Y</del>	<del>3</del>	-
Appointment of Temporary Conservator of Person and Estate – Involuntary	New 10/1/16. Replaces 'Appointment of Temporary Conservator'.	Y	3	9
<del>Appointment of Temporary Conservator Ex Parte</del>	Inactive.	<del>Y</del>	<del>2</del>	-
Appointment of Temporary Conservator of Person and Estate Ex Parte – Involuntary	New 10/1/16. Replaces 'Appointment of Temporary Conservator Ex Parte	Y	2	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Authority to Consent to Psychiatric Medication Treatment 17a-543(e)		Y	5	9
Change in DNR Order		Y	3	7
Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities	Y	2	6
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> Activate Activity	<del>Y</del>	<del>0</del>	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Competency to Vote		Y	3	6
Compromise of Claim		Y	3	6
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement <del>or Change of Residence</del>		Y	2	6
Contempt		Y	2	6
Court Review Re: Care of Conserved Person		Y	3	6
Disclaimer by Fiduciary <del>on behalf of Estate</del>		Y	1	3
Disclosure of Medical Information		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Discovery Motion		Y	2	4
Dispute Re: Health Care Decisions/Health Care Representatives		Y	5	9
Distribute Gifts of Income or Principal		Y	3	6
Election of Spousal Share by Conservator		Y	2	4
Establish Trust		Y	3	8
Excuse Account - Title XIX recipient	Additional accounts/financial reports for the same time period are excluded.	Y	4	4
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Habeas Corpus		Y	5	10
Hearing Management Conference		Y	3	6
<del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>	Inactive.	N	3	-
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator of Person and Estate – Involuntary	New 10/1/16. Replaces Hearing to Confirm or Revoke Ex Parte Appointment of Conservator	Y	3	8
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Joint Assets and Liabilities		Y	3	7
Life Support System		Y	5	10
Liquidate Structured Settlement (New)			0	6
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
One Year Review - No Hearing		Y	2	6
One Year Review Hearing		Y	2	8
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	2	6
Pro Hac Vice		Y	0	2
Provisional Order Accepting Transfer of Conservatorship from Other State		Y	3	6
Provisional Order of Transfer of Conservatorship to Other State		Y	3	6
Purchase Real Estate		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reimburse Probate Fee from Estate		Y	3	4

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2/5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
<b>Removal for Failure to File Documents (CMS) NEW</b>				4
Request for Reduction/Release of Bond		Y	0	2
<del>Resignation of Conservator and Appointment of Successor</del>	Inactive.	✗	3	-
Resignation of Conservator of Person and Estate and Appointment of Successor	New 10/1/16. Replaces 'Resignation of Conservator and Appointment of Successor'.	Y	3	7
Restoration		Y	3	7
Sale of Personal Property		Y	2	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
<del>Sell or Dispose Household Furnishings</del>	<b>Combined into new activity</b>	✗	2	-
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Sterilization		Y	5	10
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Support Allowance		Y	2	5
<del>Terminate Lease</del>	Combined into new activity	✗	2	-
Three Year Review - Hearing		Y	2	8
Three Year Review - No Hearing		Y	2	6
Transfer to Another Probate Court		Y	0	4
Try Title		Y	3	6
Unseal File		Y	3	6
Voluntary Admission by Conserved Person		Y	3	6
<b>Conservatorship of Person and Estate – Voluntary</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	2
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Appointment of Co-Conservator	This does not count if heard in conjunction with appointment of conservator.	Y	2	4
Appointment of Conservator of Person and Estate – Voluntary		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Successor Fiduciary Conservator of Person and Estate	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	3	6
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	5
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Change in DNR Order		Y	3	7
Change of Residence/Sell or Dispose of Household Furnishings/Terminate Lease	New activity combining 3 formerly separate activities			6
Compel Account by Party		Y	2	5
Compel Account on Court's Own Motion	Inactive: Activate Activity	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Compromise of Claim		Y	3	6
Conflicts between Conservators		Y	4	8
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Conservator Report		Y	.5	2
Conserved Person's Placement or Change of Residence		Y	2	6
Contempt		Y	2	6
Court Review Re: Care of Conserved Person		Y	3	6
Disclaimer by Fiduciary on behalf of Estate		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: Health Care Decisions/Health Care Representatives		Y	5	9
Distribute Gifts of Income or Principal		Y	3	6
Election of Spousal Share by Conservator		Y	2	4
Establish Trust		Y	3	6
Excuse Account - Title XIX recipient	Additional accounts/financial reports for the same time period are excluded.	Y	4	4
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded..	Y	4	8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Joint Assets and Liabilities		Y	3	7
Life Support System		Y	5	10
Liquidate Structured Settlement (New)			0	6
Mediation		Y	0	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Mortgage of Real Estate		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	2	6
Pro Hac Vice		Y	0	2
Purchase Real Estate		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Release from Voluntary Representation (New)			0	3
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
Removal for Failure to File Documents (CMS)				4
Request for Reduction/Release of Bond		Y	0	2
Resignation of Conservator and Appointment of Successor	Inactive.	Y	3	-
Resignation of Conservator of Person and Estate and Appointment of Successor	New 10/1/16. Replaces 'Resignation of Conservator and Appointment of Successor'.	Y	3	6
Sale of Personal Property		Y	2	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Sell or Dispose Household Furnishings	Combined into new activity	Y	2	-
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	3
Summon to Appear and Give Testimony		Y	3	6
Support Allowance		Y	2	5
Terminate Lease	Combined into new activity	Y	2	-
Transfer to Another Probate Court		Y	0	3
Try Title		Y	3	6
Unseal File		Y	3	6
Voluntary Admission by Conserved Person		Y	3	6
<b>Guardianship Matters</b>				
<b>Guardian of Estate</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Appointment of Co-Guardian of Estate	This activity does not count if heard in conjunction with appointment of a guardian.	Y	2	5
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Guardian of Estate and Compromise of Claim		Y	5	8
Appointment of Guardian of the Estate		Y	3	6
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> Activate Activity	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Compromise of Claim		Y	3	6
Contempt		Y	2	6
Disclaimer by Fiduciary on behalf of Estate		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Establish Trust		Y	3	8
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Liquidate Structured Settlement (New)			0	6
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	6
Pro Hac Vice		Y	0	2
Purchase Property		Y	3	6
Reconsider, Modify, Revoke Court Order		Y	3	7
Recusal with Hearing		Y	4	6
Reimburse Probate Fee from Estate		Y	3	3
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
<b>Removal for Failure to File Documents (CMS)</b>				<b>4</b>
Removal of Personal Property by Foreign Guardian		Y	3	6
Request for Reduction/Release of Bond		Y	0	2
Resignation of Guardian of Estate and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	3
Summon to Appear and Give Testimony		Y	3	6
Transfer of Minor's Funds to UTMA Account		Y	3	6
Transfer to Another Probate Court		Y	0	4
Try Title		Y	3	6
Unseal File		Y	3	6
<b>Guardian of Person</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Appointment of Co-Guardian of a Minor	This activity does not count if heard in conjunction with appointment of a guardian.	Y	3	5
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Guardian of a Minor - No Parent or Guardian		Y	3	6
Appointment of New Counsel with Hearing		Y	2	4
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	3	-

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Articulation		Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: Standby-Guardian		Y	4	8
Family Case Conference		Y	0	3
Guardians Report/Guardianship of the Person of a Minor		Y	.5	2
Hearing Management Conference		Y	3	6
Immediate Temporary Custody		Y	3	6
In-Court Review for Possible Modification of Court Order		Y	3	6
Mediation		Y	0	2
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
Objection	User must enter subject of objection.	N	0	2
Permanent Guardian		Y	3	8
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reinstatement of Parent as Guardian		Y	4	8
Removal of Guardian of the Person		Y	4	8
Resignation of Guardian of Person and Appointment of Successor		Y	3	6
Seal File		Y	3	6
Special Immigrant Juvenile Finding		Y	3	5
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Temporary Custody - No Parent or Guardian		Y	3	7
Temporary Custody Pending Removal of Guardian		Y	4	8
Temporary Guardian		Y	3	7
Transfer to Another Probate Court		Y	0	4
Transfer to Superior Court		Y	2	5
Unseal File		Y	3	6
Visitation on Motion of a Party		Y	3	7
<b>Mentally Ill, Non-Committed</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Appointment of GAL on Petition of Party		Y	1	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Articulation		Y	0	2
Contempt		Y	2	6
Continuation of DCF Care or Placement (Voluntary)	Replaces 'DCF Initial Permanency Hearing'.	Y	4	4
Disclosure of Medical Information		Y	3	6
Discovery Motion	Delete activity	N	2	-
Family Case Conference		Y	0	3
Hearing Management Conference		Y	3	6
In-Court Review for Possible Modification of Court Order		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Review of DCF Case Service Plan	Replaces 'DCF Subsequent Permanency Hearing'.	Y	4	4
Review of DCF Permanency Plan (Voluntary)	Replaces 'DCF Subsequent Permanency Hearing'.	Y	4	4
Review of Termination of DCF Care or Placement (Voluntary)		Y	3	6
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6
<b>Emancipation</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Articulation		Y	0	2
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Emancipation of Minor		Y	5	7
Family Case Conference		Y	0	3
Hearing Management Conference		Y	3	6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6
<b>Paternity</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Articulation		Y	0	2
Blood/DNA Test Order - Motion by Party		Y	3	4
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Family Case Conference		Y	0	3
Hearing Management Conference		Y	3	6
News Media Coverage		Y	3	7
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Paternity Claim		Y	4	7
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6
<b>Guardian of Persons with Intellectual Disabilities</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Administrative Closing		Y	0	2
Appointment of Co-Guardian	This activity does not count if heard in conjunction with appointment of a guardian.	Y	2	4
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Guardian of Person with Intellectual Disabilities		Y	4	8
Appointment of New Counsel with Hearing		Y	2	4
Appointment of Stand-by or Stand-by Co-Guardian	This activity does not count if heard in conjunction with appointment of a guardian.	Y	2	4

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	2	5
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Articulation		Y	0	2
Change in DNR Order		Y	3	7
Compel Account by Party (New)				4
Compel Account on Court's Own Motion (New)				2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Competency to Vote		Y	3	6
Conflicts between Guardian and Conservator (45a-679)		Y	4	8
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: Health Care Decisions/Health Care Representatives		Y	5	9
Final Account (New)				6
Final Financial Report (New)				6
Five Year Review Hearing Re: Placement of person with Intellectual Disability		Y	2	6
Guardian's Report / Guardianship of the Person with Intellectual Disabilities		Y	.5	2
Habeas Corpus		Y	5	10
Hearing Management Conference		Y	3	6
Interim Account (New)				6
Interim Financial Report (New)				6
Life Support System		Y	5	10
Manage Protected Person's Finances (New)				6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Placement of Person with Intellectual Disabilities		Y	4	8
Pro Hac Vice		Y	0	2
Release of Funds(New)				2/5
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
Removal for Failure to File (CMS)				4
Resignation of Guardian of Person with Intellectual Disabilities and Appointment of a Successor		Y	2	4
Review of Placement		Y	3	6
Seal File		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Sterilization		Y	5	10
Summon to Appear and Give Testimony		Y	3	6
Temporary Limited Guardian of a Person with Intellectual Disabilities		Y	4	8
Three Year Review - No Hearing - Guardian of a Person with Intellectual Disabilities		Y	2	5
Three Year Review Hearing		Y	2	7
Transfer to Another Probate Court		Y	0	4
Unseal File		Y	3	6
Visitation		Y	3	7
<b>Adoptions and Terminations</b>				
<b>Adoptions</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Statutory Parent		Y	1	2
Approval of Adoption - Co-parent		Y	4	7
Approval of Adoption - Relative		Y	4	7
Approval of Adoption - Statutory Parent (DCF Identified)		Y	4	7
Approval of Adoption - Statutory Parent (DCF Non-Identified)		Y	4	7
Approval of Adoption - Statutory Parent (Private Agency Identified)		Y	4	7
Approval of Adoption - Statutory Parent (Private Agency Non-Identified)		Y	4	7
Approval of Adoption - Step-Parent		Y	4	7
Approval of Adult Adoption		Y	2	4
Articulation		Y	0	2
Certificate of Birth Registration		Y	0	3
Determination of Age/Date of Birth of Adopted Person Born Outside US		Y	2	4
Enforce or Modify Postadoption Agreement		Y	3	7
Family Case Conference		Y	0	3
Mediation			0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Obtain Identifying Information (Appoint GAL)	Replaces 'Obtain Identifying Information'.	Y	1	2
Refusal of Agency to Release Information	Replaces 'Obtain Non-Identifying Information'.	Y	1	2
Original Birth Certificate by Adult Adoptee		Y	1	2

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Placement for Out-of State Adoption		Y	3	4
<del>Pre-Adoption Conference</del>		Y	0	
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Release of Medical Information Re: Adoptee (C.G.S. 45a-754(d))		Y	2	4
Special Immigrant Juvenile Finding		Y	3	5
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Validation of Foreign Adoption		Y	2	4
<b>Termination of Parental Rights</b>				
<b>Acceptance of Citation</b>	<b>Only for court of judge accepting citation</b>			<b>1</b>
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Statutory Parent		Y	1	2
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'.	Y	2	6
Articulation		Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	5
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Enforce or Modify Postadoption Agreement		Y	3	7
Family Case Conference		Y	0	3
Hearing Management Conference		Y	3	6
<b>Immediate Temporary Custody (NEW in TPR)</b>		Y	3	<b>6</b>
Mediation		Y	0	2
<b>Motion to Disqualify Counsel (NEW)</b>	<b>(Not court-appointed attorney)</b>		0	<b>6</b>
Objection	User must enter subject of objection.	N	0	2
Permanency Plan Hearing		Y	3	5
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Seal File		Y	3	6
Special Immigrant Juvenile Finding		Y	3	5
Status Conference		Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Temporary Custody Pending Termination of Parental Rights		Y	4	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Termination of Parental Rights		Y	5	10
Transfer to Superior Court		Y	2	5
Unseal File		Y	3	6
Visitation on Motion of a Party		Y	3	7
<b>ElectroConvulsion Therapy</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Appointment of New Counsel with Hearing		Y	2	4
Disclosure of Medical Information		Y	3	6
Disclosure of Sealed Records		Y	3	5
Discovery Motion		Y	2	4
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Permission for Shock Therapy		Y	5	10
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Status Conference	User must enter subject of conference.	Y	2	4
<b>Commitments</b>				
<b>Commitment Adult</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Annual Review Hearing		Y	4	7
Annual Review/Appointment of Psychiatrist - No Hearing		Y	2	4
Appointment of GAL on Petition of Party		Y	1	2
Appointment of New Counsel with Hearing		Y	2	4
Articulation		Y	0	2
Biennial Review Hearing		Y	4	7
Commitment- Alcohol & Drug Dependency	MOVE TO A & D COMMITMENT	Y	5	10
Commitment at Expiration of Term of Imprisonment		Y	5	10
Commitment of Adult – Involuntary		Y	5	10
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Disclosure of Sealed Records		Y	3	5
Discovery Motion		Y	2	4
Drug & Alcohol Recommitments		Y	3	8
Expedited hearing re: administration of Involuntary medication under 17a-543 (g) New			0	9
Habeas Corpus		Y	5	10
Hearing Management Conference		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Judicial Commitment for Treatment of Tuberculosis - Continuing Commitment Order	MOVE TO OTHER	Y	3	7
Judicial Commitment for Treatment of Tuberculosis - Initial Commitment Order	MOVE TO OTHER	Y	3	8
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Probable Cause Hearing - Adult Commitment		Y	4	7
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Release from Confinement		Y	4	8
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Termination of Alcohol and Drug Commitment		Y	4	8
Warrant Enforcement Examination of Respondents Re: Tuberculosis	MOVE TO OTHER	Y	3	7
Warrant for Examination by Court		Y	3	7
<b>Commitment - Child</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Appointment of New Counsel with Hearing		Y	2	4
Articulation		Y	0	2
Commitment of Child – Involuntary		Y	5	10
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Hearing Management Conference		Y	3	6
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Probable Cause Hearing - Child Commitment		Y	3	7
Recommitment Hearing		Y	3	7
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Review of Status of Voluntary Patient		Y	4	8
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Transfer to Superior Court		Y	2	5
<b>Name Change</b>				

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Articulation		Y	0	2
Change of Name – Adult		Y	2	4
Change of Name – Child		Y	3	7
Change of Name – Family		Y	3	6
Contempt		Y	2	6
Discovery Motion		Y	2	6
Hearing Management Conference		Y	3	6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6
<b>Other Matters</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Action on Probate Bond		Y	5	6
Appointment of an UTMA Custodian/Successor Custodian		Y	3	6
Appointment of GAL on Petition of Party		Y	1	2
Approval of Cemetery Association Accounting	Additional accounts/financial reports for the same time period are excluded.	Y	3	6
Approval of Power of Attorney Accounting/Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	3	8
Approval of UTMA Accounting	Additional accounts/financial reports for the same time period are excluded.	Y	3	7
Articulation		Y	0	2
Authorize DSS to Enter Premises for Assessment		Y	3	7
Compel Cemetery Association Minutes or Accounting		Y	3	4
Compel Power of Attorney Accounting		Y	3	7
Compel UTMA Accounting		Y	3	6
Confirm Change in Gender		Y	1	4
Construe POA		Y	3	7
Contempt		Y	2	6
Delayed Birth Registration		Y	3	6

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Dispute Re: UTMA Accounts		Y	3	8
Dispute Re: Health Care Decisions/Health Care representatives		Y	5	10
Enforce POA	New 10/1/16	Y	3	7
Expedited hearing re: administration of Involuntary medication under 17a-543 (g) NEW			0	9
Hearing Management Conference		Y	3	6
Injunction Requested by Department of Social Services		Y	3	6
Isolation/Quarantine/Vaccination		Y	3	8
Life Support System		Y	5	10
Approval of Marriage of a Minor Approve Marriage of Minor (new title)		Y	1	6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order Authorizing Psychiatric Medication - 17a-543(f)		Y	5	9
Preservation of Monuments and Gravestones		Y	2	5
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Remove UTMA Custodian		Y	3	7
Review Conduct of Agent (POA)	Possible combination with other POA activities	Y	3	6
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Sterilization		Y	5	10
Summon to Appear and Give Testimony		Y	3	6
Terminate/Modify Orders of Isolation/Quarantine/Vaccination		Y	3	5
Transfer of Minor's Funds to UTMA Account		Y	3	6
Unseal File		Y	3	6
<b>Passports</b>				
Passports		Y	0	1
<b>Restore Federal Firearms Rights</b>				
Acceptance of Citation	Only for court of judge accepting citation			1
Appointment of GAL on Petition of Party		Y	1	2
Articulation		Y	0	2

# Tally Rules Document

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Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Contempt		Y	2	6
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Hearing Management Conference		Y	3	6
Mediation		Y	0	2
Motion to Disqualify Counsel (NEW)	(Not court-appointed attorney)		0	6
Objection	User must enter subject of objection.	N	0	2
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Restore Right to Purchase, Possess, or Transport a Firearm		Y	5	10
Seal File		Y	3	6
Status Conference		Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6