

**Minutes of the February 27, 2017 Meeting
of the Procedures Review Committee**

The following were in attendance at the meeting: Hon. Peter Barrett; Hon. Charles Norris; Hon. Daniel O'Grady; Hon. Robert Randich; 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; Alison Green, Probate Administration Staff Assistant; Dana Masullo, Probate Administration Help Desk Analyst.

The following were absent from the meeting: Hon. Jennifer Berkenstock, Chair; Hon. Diane S. Blick; Hon. Philip Wright; and Gale Pellegren, Chief Clerk Torrington Area Probate Court.

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

Old Business: None

New Business: The Committee welcomed two new members; Hon. Daniel O'Grady, Northern Fairfield County Probate Court; and Dana Masullo, Probate Administration Help Desk Analyst.

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

The March meeting will be cancelled. The committee will resume its work as scheduled on April 24, 2017.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at 12:15pm.

Respectfully submitted,

Loreen Michalak

Loreen (Lori) Michalak

The March 27, 2017 meeting is cancelled

THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON

MONDAY, APRIL 24, 2017 AT 9:00 AM

IN THE LIBRARY AT PROBATE ADMINISTRATION

Forms for Consideration
at February 27, 2017 Meeting

PC#/old CM #	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
571	Renamed: Acceptance of Trust and Agreement of Fiduciary/Guardian of a Minor's Estate		X	Combine Acceptance of Trust and Agreement of Guardian of Estate of Minor; Minor revisions & new format	02/27/17	Approved 2/27/17
NEW 3704	Agreement of Fiduciary/Conservator of Estate		X	Seek input for new form modeled on PC-571 Agreement of Fiduciary/GOE; Committee will submit suggestions by February 6 for new Agreement of Trust form for consideration at 2/27/17 meeting	1/30/2017; 2/27/17	Discussed 1/30/17; Approved 2/27/17
NEW 3705	Agreement of Fiduciary/Conservator of Person		X	Seek input for new form modeled on PC-571 Agreement of Fiduciary/GOE; Committee will submit suggestions by February 6 for new Agreement of Trust form for consideration at 2/27/17 meeting	1/30/2017; 2/27/17	Approved 2/27/17
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 2/27/17 meeting	11/28/201 6;2/2/27/1 7	1/30/2017; Discussed; Approved 2/27/17
3013	Petition/Excuse Account/Title 19 Eligibility	x		Additional edits to form approved on 1-17 to be consistent to new decree	1/30/17, 2/27/17	Approved 2/27/17
PC-3619	Decree/ Excuse Account Title XIX Eligibility		X	New decree re: Probate Court Rules of Procedure section 33.17	02/27/17	Approved 2/27/17
2801	Letter of Transmittal/Recipient of State Aid or Care	X		Rename form; Update DAS-Financial Services Address; clarify that only PC-200s that indicate state assistance need to be sent to DAS by Certified Mail Return Receipt Requested;	02/27/17	Approved 2/27/17

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281	Letter of Transmittal/Recipient of State Aid or Care	X		MAKE OBSOLETE when PC-2801 is deployed.	02/27/17	Approved 2/27/17
2807	NEW Transmittal for PC-212s and PC-200s/No State Aid or Care Listed	X		New transmittal form for PC-200s and PC-212 s that are not required to be sent to DAS by certified mail	02/27/17	Approved 2/27/17
NEW; 7006 CM-11	Petition/Temporary Limited Guardian		X	Convert CM-11 to PC form in new format;update form as necessary to comply with statute	02/27/17	Approved 2/27/17
NEW; 7203 CM-12	Order of Notice/Temporary Limited Guardian	X		Convert CM-12 to PC form; update form as necessary to comply with statute	02/27/17	Approved 2/27/17
NEW- 7607 CM-13	Decree/Temporary Limited Guardian	X		Convert CM-13 to PC form; update form as necessary to comply with statute	02/27/17	Approved 2/27/17
NEW 6104 CM-19	Affidavit/Birth Parent Counseling Post Birth Session		X	Convert CM-19 to PC form in new format; update form as necessary to comply with statute		Approved 2/27/17
NEW 6011 CM-20	Petition/Appointment of GAL/Identifying Info		X	Convert CM- 20 to new format; Complete revision to comply with statutes, 45a-751-753	02/27/17	Approved 2/27/17
NEW 6610 CM-21;	NEW NAME Decree/Appointment of GAL/Release of Identifying Information	X		Convert CM-19 to new PC form; Complete revision to comply with statutes, 45a-751-753	02/27/17	Approved 2/27/17
440	Inventory		X	Clarification of assets that Conservator needs to list	02/27/17	Approved 2/27/17
200	Petition/Administration or Probate of Bill			Add "nominated testamentary trustees and intervivos trust to #2 on page 2	02/27/17	Approved 2/27/17
861, etc.	Commitment decree	X		Remove SS #, gender, present address from decree, Simplify attestation section	02/27/17	Approved 2/27/17

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861W,	Commitment worksheet	X		Remove SS #, gender, present address from decree, Simplify attestation section	02/27/17	Approved 2/27/17
861A	DECREE/REVIEW/INVOLUNTARY COMMITMENT OF PERSON WITH PSYCHIATRIC DISABILITIES/ HEARING	X		Remove SS #, gender,present address from decree, Simplify attestation section	02/27/17	Approved 2/27/17
861B	DECREE/REVIEW/INVOLUNTARY COMMITMENT OF PERSON WITH PSYCHIATRIC DISABILITIES/NO HEARING	X		Remove SS #, gender,present address from decree, Simplify attestation section AND CHANGE NAME OF FORM	02/27/17	Approved 2/27/17
236A 236B 235C 236D 236E	Streamline Notices			Remove the date at the bottom of page 1 of the streamline notice forms; The date the notice is sent is listed on the return of notice of right to request hearings	02/27/17	Approved 2/27/17
		X				