

Statistics Committee Meeting Minutes

June 16, 2017
Newington Probate Court
66 Cedar Street
Newington, CT

Meeting convened at 10:00 am by Judge Andre Dorval, Chair.

Other members in attendance: Judge Philip Wright; Attorney Bonnie Bennet; Attorney Evan Brunetti; Judge Evelyn Daly; Judge Andrea Truppa via telephone; Judge McGrath, Secretary

The minutes of the February 10, 2017 meeting, April 13, 2017 meeting and May 12, 2017 meeting were approved unanimously.

At the last meeting it was announced that Sondra Waterman had resigned from the committee. Ms. Lori Errico, Chief Clerk of the West Hartford Probate Court, has agreed to join the committee at its next meeting.

The committee reviewed several items left over from previous discussions of weight to be assigned to activities in the decedents' estates and trusts, as follows:

- 1) There was a discussion of whether to maintain an activity for will contests or to have the extra work reflected with the other associated activities such as discovery motions and hearing management conferences. The committee decided that it was appropriate to retain a will contest as a separate activity if the court holds an evidentiary hearing. The committee assigned a weight of 8.
- 2) In the Trust Living case type, the committee decided to eliminate the activity "Compel Account for Inter Vivos Trust" since it is the same as "Compel Account by Party". The committee assigned a weight of 4 to "Compel Account by Party" in all trust case types.
- 3) In response to a question raised at the May meeting, it was decided to eliminate the activity "Purchase Property" in trust case types since it is covered by "Approval/Instruction re: Action by Fiduciary."

The committee then began a review of conservator matters. Its recommended weight to attach to each activity will not be listed in the minutes but is reflected in the attached Tally Rules Document.

The committee decided to put an asterisk next to those activities which it believes might warrant more than the 10 points, which it previously imposed as the maximum weight. These items will be reconsidered by the committee after it completes its initial review of all activities.

Several new conservator activities have been added in CMS since the Tally Rules Document was first disseminated to the committee. The committee reviewed these activities and awarded the following weights:

- 1) Appointment of a Conservator of the Person - Involuntary for the Sole Purpose of Psychiatric Medication – 10* points.
- 2) Placement of a Conserved Person - 6 points. This activity was previously combined with “Change of Residence”.

The committee decided to combine “Change of Residence” with “Sell or Dispose Household Furnishings” and “Terminate Lease” into one activity with a weight of 6.

Bonnie Bennet will check the PCA files from previous weighted workload reviews to determine what procedure was followed to insure opportunities for input from judges and court staff in the review process.

The committee will next meet on July 21, 2017 at 10:00 am at PCA.

Submitted by John McGrath, Secretary

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Fee Waivers				
Fee Waiver		Y	.5	2
Decedent Estates				
Decedent Regular Estates				
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
Compel Account by Party		Y	2	3

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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
Compromise of Claim		Y	3	6
Construe Will		Y	3	6
Contempt	Civil contempt only	Y	2	6
CT-706 NT	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	N	1	3
CT-706/709 Amendment (New)				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 on behalf of the Estate		Y	1	3
Disclosure of Estate/Succession Tax Return		Y	3	5
Disclosure of Medical Information		Y	3	6
Discovery Motion	Does not count in Will Contests.	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 with claims procedure		Y	3	7
Insolvent Estate without claims procedure (New)				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
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
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
Decedent Estate Affidavit and TPO				
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	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	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
Decedent Estates Tax Purposes Only				
Articulation		Y	0	2
Certificate Releasing Liens		Y	0	2
CT-706 NT	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	N	1	3
CT-706/709 Amendment (New)				1
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
Decedent Estate 4a-16 Case				
4a-16 Petition		Y	0	2
Status Conference	User must enter subject of conference.	Y	2	4
Decedent Estate Will for Filing Only				
Affidavit and Will are entered as form received.		Y	0	1
Decedent General				
Access to Jointly-Owned Assets in Safe Deposit Box		Y	3	6

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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
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
Trusts				
Testamentary Trust				
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		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 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	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
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
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

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	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 driven by CMS Reminders (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
Trust – CASE TYPE NO LONGER ACTIVE				
Action on Probate Bond		Y	5	
Administrative Closing		Y	0	
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	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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	
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	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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	
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	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Unseal File		Y	3	
Trust Living				
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
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
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
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 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
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
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
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 driven by CMS Reminders (New)	Is this needed in Living Trusts?			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

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
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
Trust Other				
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
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	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

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
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 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 6.	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
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

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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 driven by CMS Reminders (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
Conservators				
Conservatorship of Person Involuntary				
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 – 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	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	-

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
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	4
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
Life Support System		Y	5	
Mediation		Y	0	
News Media Coverage		Y	3	
Objection	User must enter subject of objection.	N	0	
One Year Review - No Hearing		Y	2	
One Year Review Hearing		Y	2	
Pro Hac Vice		Y	0	
Provisional Order Accepting Transfer of Conservatorship from Other State		Y	3	
Provisional Order of Transfer of Conservatorship to Other State		Y	3	
Reconsider, Modify, Revoke Court Order		Y	3	
Recusal with Hearing		Y	4	