

**MINUTES OF THE JUNE 4, 2018 MEETING  
OF THE PROCEDURES REVIEW COMMITTEE**

**The following were in attendance at the meeting:** Hon. Jennifer Berkenstock, Chair; Hon. Diane Blick; Hon. Peter Barrett; Hon. Robert Randich; Gale Pellegren, *Chief Clerk Torrington Area Probate Court*; Susan Meagher, Chief Clerk, Berlin Probate Court; Bonnie Bennet, *Probate Administration Legal Counsel*; Heather Dostaler, *Probate Administration Staff Attorney*; Alison Green, *Probate Administration Staff Assistant*; Dana Masullo, *Probate Administration IT Department*

**The following were absent from the meeting:** Hon. Chuck Norris; Hon. Daniel O'Grady; Hon. Philip Wright; Lori Michalak, Chief Clerk Shelton Probate Court

**Call to order:** The meeting was called to order at 9:15 a.m.

**Old Business:** NONE

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

**Adjournment:** Upon motion duly made and seconded, the meeting was adjourned at 11:35 a.m.

Respectfully submitted,

*Diane S. Blick*

Hon. Diane S. Blick, Secretary

***THE JULY MEETING HAS BEEN CANCELLED.***

***THE AUGUST 6<sup>th</sup> MEETING HAS BEEN RESCHEDULED TO AUGUST 13<sup>th</sup>***

**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL  
BE ON MONDAY, AUGUST 13, 2018 at 9:00 a.m.  
IN THE LIBRARY AT PROBATE ADMINISTRATION**

## Forms for Consideration 6-4-18

PC #	P/C	Form Name	CMS	CMS Case Type	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action
182A	P	Appointment of Attorney	X			Updated to provide more detail regarding the statutory basis for the appointment	06/04/18	Approved 6-4-18
182B	P	Appointment of GAL	X			Updated to provide more detail regarding the statutory basis for the appointment	06/04/18	Approved 6-4-18
250	P	Certificate of Devise, Descent, or Distribution	X		X	Change "original to" to "sent to" to allow court to send certified copy rather than original to fiduciary for recording on the land records	06/04/18	Approved 6-4-18
253S, 256, 256S, 257, 258, 2512, 2512S	P	Release of Liens	X			Change "original to" to "sent to" to allow court to send certified copy rather than original to fiduciary for recording on the land records	06/04/18	Approved 6-4-18
261	P	Decree Granting Ancillary Administration	X			Remove reference to the declination of the primary fiduciary since the court will give full faith and credit to the decree of the court of the other state	06/04/18	Approved 6-4-18
300	P	Petition/Appointment of Conservator			X	Discussion re: Request to add date of birth of proposed conservator for criminal record check; Committee decided not to add birth date on form. Court may ask proposed conservator for birth date on a case-by-case basis	06/04/18	No Change
5013	P/C	Petition/Appointment of Voluntary Guardian of Person age 18 to 20			X	New procedure per P.A.18-92 for persons 18 to 20 who petition for SIJS findings effective July 1, 2018	06/04/18	Approved 6-4-18

## Forms for Consideration 6-4-18

5013CI	P/C	Confidential Information/ Petition/Appointment of Voluntary Guardian of Person Age 18 to 20			X	<b>New confidential information sheet</b> per PA-18-92	06/04/18	Approved 6-4-18
5613	P/C	Decree/Appointment of Voluntary Guardian of Person Age 18 to 20	X			New procedure per P.A.18-92 for persons 18 to 20 who petition for SIJS findings effective July 1, 2018	06/04/18	Approved 6-4-18
5013	P/C	Petition/Appointment of Voluntary Guardian of Person age 18 to 20			X	For October deployment: Add domicile and location as basis of jurisdiction per P.A.18-45, sec. 10	06/04/18	Approved 6-4-18
5613	P/C	Decree/Appointment of Voluntary Guardian of Person Age 18 to 20	X			For October deployment: Add domicile and location as a basis of jurisdiction per P.A. 18-45, sec. 10	06/04/18	Approved 6-4-18
508	P/C	Petition/Appointment of Guardian Where Parents/Legal Guardians deceased			X	For October deployment: Add domicile and location as a basis of jurisdiction per P.A. 18-45, sec. 10	06/04/18	Approved 6-4-18
567	P/C	Decree/Appointment of Guardian Where Parents/Legal Guardians deceased	x			For October deployment: Add domicile and location as a basis of jurisdiction per P.A. 18-45, sec. 10; additional findings and option to deny petition	06/04/18	Approved 6-4-18
509	P/C	Petition/Appointment of Coguardian			X	For October deployment: Add domicile and location as a basis of jurisdiction per P.A. 18-45, sec. 10	06/04/18	Approved 6-4-18
568	P/C	Decree/Appointment of Coguardian	X			For October deployment: Add domicile and location as a basis of jurisdiction per P.A. 18-45, sec. 10	06/04/18	Approved 6-4-18
609	P/C	Petition/Special Immigrant Juvenile Filings under 8 USC 1011			X	Updated to include appointment of guardian in instructions; Should we renumber this SIJS form and decree to a 500 series?	06/04/18	No change in form number

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666	P/C	Decree/SIJS Findings	X			For Information only: Removed jurisdiction language re:dependent on the court; For discussion: Should we renumber this form to a 500 series? Committee decided to change form number to next 600 decree in October	06/04/18	Change form number
700	P/C	Petition/Appointment of GID			X	Discussion Re: Request to add date of birth of proposed guardian for criminal record check; Committee decided not to add birth date on form. Court may ask proposed guardian for birth date on a case-by-case basis	06/04/18	No Change
701	P/C	<b>Petition/</b> Placement of Person With Intellectual Disability <b>with DDS</b>			X	New title, instructions and format	06/04/18	Approved 6-4-18
72XX	P/C	Order of Notice/Placement of Person with Intellectual Disability with DDS	X			New order of notice for placement with DDS	06/04/18	Approved 6-4-18
731	P/C	Notice of Placement of Person with Intellectual Disability <b>with DDS</b>	X			New title; revised notice pursuant to 17a-274(d)	06/04/18	Approved 6-4-18
761	P/C	Decree/Placement of Person with Intellectual Disability <b>with DDS</b>	X			New title; revisions to reflect statutory changes and provide options for the court, including denial of petition	06/04/18	Approved 6-4-18
772	P/C	Psychologist Report/Placement of Person with Intellectual Disability <b>with DDS</b>			X	New title, format and instructions	06/04/18	Approved 6-4-18
7705	P/C	Acceptance of Appointment and Agreement of GID			X	New form similar to Conservator Acceptance and Agreement; Committee requested that we consider creating a new form for acceptance of authority to manage finances.	06/04/18	Approved 6-4-18; Create a new form for authority to manage finances

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763		Decree/Review Proceedings Appointment of Guardian of Person with Intellectual Disability	X			Fix typo: 45a-681(b);Suggestion: state "guardian of the protected person", rather than appointment of "guardian of the person of protected person"	06/04/18	Approved 6-4-18
861	P/C	Decree/Involuntary Commitment of Person with Psychiatric Disabilities	X			Add check box re admitting physician's certificates into evidence; add text box if not admitted	06/04/18	Approved 6-4-18
861W	C	Worksheet/Involuntary Commitment of Person with Psychiatric Disabilities	X			Add check box re admitting physician's certificates into evidence; add text box if not admitted; Add "W" to title at top of form	06/04/18	Approved 6-4-18
861A	P/C	Decree/Review/ Involuntary Commitment of Person with Psychiatric Disabilities	X			Add check box re admitting physician's certificates into evidence; add text box if not admitted	06/04/18	Approved 6-4-18
New?		Discuss possible new form re: firearms in conservatorships				Suggestion: develop new form for conservator with authority over conserved person's firearms to inform court whether person owns or has access to firearms, ammunition or electronic defense weapons and, if so, actions taken to secure them; It was the consensus of the committee not to create a new form, but consider revising the conservator report to inquire about the status of conserved person's firearms.	3/5/2018; 4/02/18; 6/4/18	Consider revising Conservator's Report
CM-58		File Information Sheet/Review of GID				Make obsolete given new GIDs Alert System	06/04/18	Make Obsolete
CM-59		File Information Sheet/Review of Conservatorship				Make obsolete given new Conservator Alert System	06/04/18	Make Obsolete
200	P	Petition/Administration or Probate Will				Discuss whether to add "guardianship of person with intellectual disability" to section re: beneficiary/heirs	6/4/2018	No Change