

STATISTICS COMMITTEE

JULY 21, 2017

Newington Probate Court, Newington, Ct.

Meeting convened at 10:15 a.m. by Judge Andre Dorval, Chair.

Other members in attendance: Judge Philip Wright; Attorney Bonnie Bennet; Attorney Evan Brunetti, Chief Clerk , Farmington Burlington Probate Court; Lori Errico, Chief Clerk, West Hartford Probate Court; Judge McGrath, Secretary

The minutes of the June 16, 2017 meeting were approved unanimously. Motion by Evan Brunetti and second by Judge Wright.

New Business:

Judge Dorval welcomed Lori Errico, Chief Clerk of the West Hartford Probate Court.

The committee discussed having the tally activities reflect a new procedure for removal of a fiduciary for failure to file documents. Beginning in the fall, CMS will generate reminder letters for overdue documents in conservatorships. It is recommended that the court hold a removal hearing for a failure to file after three reminders. The court will not need to hold a prior status conference. This activity was identified by the committee in the trust case type as "Removal driven by CMS Reminders". The committee agreed that removals in response to the CMS reminders should be clearly identified and distinguished from other removals by the court on its own motion. The committee changed the title of the activity to "Removal for failure to file documents (CMS)" and assigned a weight of 4. The weight for other removals in conservatorship matters on the court's own motion was assigned a weight of 7.

The committee completed its initial review of the weights assigned for activities through both involuntary conservator of person and involuntary conservator of the estate. The recommended weights are listed on the attached Tally Rules Document Revised 7-21-17. Bonnie offered to fill in the preliminary weights for the involuntary conservator of the estate and person based on the weights assigned by the committee, which will be reviewed at the August meeting.

Old Business: There was no old business discussed.

Meeting adjourned at 12:15 p.m.

The committee will next meet on AUGUST 11, 2017 at 10:00 am at PCA.

Submitted by John McGrath, Secretary

July 26, 2017

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 |
| 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 |
|--|--|---------------------------|----------------|------------|
| | | | | |
| | | | | |
| 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Decedent General | | | | |
| 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 |
| 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 |

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 | 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 | 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 |

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 |
| 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 |
| Trust – CASE TYPE NO LONGER ACTIVE | | | | |
| 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 | |
| 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 | N | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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 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 | | N | 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 for Failure to File Documents (CMS) NEW | Is this needed in Living Trusts? | | | 3 |

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 |
| 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 |

Tally Rules Document

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

Tally Rules Document

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

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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 | - |
| 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 | 10 |
| Mediation | | Y | 0 | 2 |
| 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 |
|--|--|---------------------------|----------------|------------|
| 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 |
| Removal for Failure to File Documents (CMS) New | | | - | 4 |
| Resignation of Conservator and Appointment of Successor | 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 |
| Sell or Dispose Household Furnishings | 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 |
| Terminate Lease | 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 |
| Conservatorship of Person Voluntary | | | | |
| 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 |
| 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 |

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 |
| 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 |
| 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 |
| 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 |
| 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 |
| Resignation of Conservator and Appointment of Successor | 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 |
| 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 | - |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Transfer to Another Probate Court | | Y | 0 | 4 |
| Unseal File | | Y | 3 | 6 |
| Voluntary Admission by Conserved Person | | | 3 | 6 |
| Conservatorship of Estate - Involuntary | | | | |
| 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 | 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 | 1 |
| Compel or Prohibit Action by Fiduciary | User must enter subject of petition. | Y | 2 | 4 |
| 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| 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. | Y | 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 |
| 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 |
| 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 |
| 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 | 2/5 |
| Removal of Fiduciary | | Y | 3 | 7 |
| Removal of Fiduciary on Court's Own Motion | | Y | 3 | 7 |
| Removal for Failure to File Documents (CMS) NEW | | | | 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 |
| Restoration | | Y | 3 | 7 |
| 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 | N | 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 |
| Terminate Lease | Combined into new activity | N | 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 |
| Conservator of Estate - Voluntary | | | | |
| 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. | Y | 4 | |
| Allowance of Financial Report for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Appointment of Co-Conservator | This does not count if heard in conjunction with appointment of conservator. | Y | 2 | |
| Appointment of Conservator of the Estate – Voluntary | | Y | 3 | |
| 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 | |
| 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 | |
| Compromise of Claim | | Y | 3 | |
| Conflicts between Conservators | | Y | 4 | |
| Conflicts between Guardian and Conservator (45a-679) | | Y | 4 | |
| Conservator Report | | Y | .5 | |
| Conserved Person's Placement or Change of Residence | | Y | 2 | |
| Contempt | | Y | 2 | |
| Disclaimer by Fiduciary | | Y | 1 | |
| Disclosure of Medical Information | | Y | 3 | |
| Discovery Motion | | Y | 2 | |
| Distribute Gifts of Income or Principal | | Y | 3 | |
| Election of Spousal Share by Conservator | | Y | 2 | |
| Establish Trust | | Y | 3 | |
| Excuse Account - Title XIX recipient | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Final Account | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Final Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Hearing Management Conference | | Y | 3 | |
| Interim Account | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Interim Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 4 | |
| Joint Assets and Liabilities | | Y | 3 | |
| 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 | 2 | |
| Pro Hac Vice | | Y | 0 | |
| Purchase Real Estate | | Y | 3 | |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Reconsider, Modify, Revoke Court Order | | Y | 3 | |
| Recusal with Hearing | | Y | 4 | |
| 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 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 | |
| Sale of Personal Property | | Y | 2 | |
| Sale of Real Estate | | Y | 3 | |
| Seal File | | Y | 3 | |
| Sell or Dispose Household Furnishings | | Y | 2 | |
| 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 | |
| Support Allowance | | Y | 2 | |
| Terminate Lease | | Y | 2 | |
| Transfer to Another Probate Court | | Y | 0 | |
| Try Title | | Y | 3 | |
| Unseal File | | Y | 3 | |
| Conservatorship of Person and Estate – Involuntary | | | | |
| 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 | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Appointment of Temporary Conservator | Inactive. | ✗ | 3 | - |
| Appointment of Temporary Conservator of Person and 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 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 | Inactive. Activate Activity | ✗ | 0 | 1 |
| Compel or Prohibit Action by Fiduciary | User must enter subject of petition. | Y | 2 | 4 |
| 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 or Change of Residence | | Y | 2 | 6 |
| Contempt | | Y | 2 | 6 |
| Court Review Re: Care of Conserved Person | | Y | 3 | 6 |
| Disclaimer by Fiduciary | | 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 | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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 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 |
| 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 |
| 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 |
| 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 |
| Removal for Failure to File Documents (CMS) NEW | | | | 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 | 7 |
| Restoration | | Y | 3 | 7 |
| Sale of Personal Property | | Y | 2 | 6 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Sale of Real Estate | | Y | 3 | 6 |
| Seal File | | Y | 3 | 6 |
| Sell or Dispose Household Furnishings | Combined into new activity | ✗ | 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 |
| Terminate Lease | 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 |