

**MINUTES OF THE AUGUST 13, 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*; Lori Michalak, Chief Clerk Shelton Probate Court; Bonnie Bennet, *Probate Administration Legal Counsel*; Heather Dostaler, *Probate Administration Staff Attorney*; Alison Green, *Probate Administration Staff Assistant*; Dana Masullo, *Probate Administration IT Department*

The following were absent from the meeting: Hon. Chuck Norris; Hon. Daniel O’Grady; Hon. Philip Wright; Susan Meagher, Chief Clerk, Berlin Probate Court

Call to order: The meeting was called to order at 9:02 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.

The Committee discussed concerns raised by Judge DeGennaro regarding computer formatting issues when creating a decree as well as other ongoing computer issues.

Upon motion duly made and seconded, it was unanimously approved to cancel the September meeting.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at 11:45 a.m.

Respectfully submitted,

Diane S. Blick

Hon. Diane S. Blick, Secretary

THE SEPTEMBER MEETING HAS BEEN CANCELLED

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, OCTOBER 1, 2018 at 9:00 a.m.  
IN THE LIBRARY AT PROBATE ADMINISTRATION**

## Forms for Consideration 8-13-18

| PC #         | P/C | Form Name                                                                              | CMS | CMS Case Type | WEB | Suggested Change(s)/Action Taken                                                                                                                                                                                      | Date of Committee Review | Committee Action                                                                                                                                                                                  |
|--------------|-----|----------------------------------------------------------------------------------------|-----|---------------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 284          | P   | Initial Appointment of Trust/Testamentary Trustee                                      |     |               | X   | Suggestion from a court to add date of birth for a beneficiary if a minor or if the trust terminates when the beneficiary attains an age certain.                                                                     | 8/13/2018                | Approved 8/13/18                                                                                                                                                                                  |
| 360          | P   | Decree/Appointment of Involuntary Conservator                                          |     |               | X   | Modify decree to only include language re: deference to health care representative if a conservator of person is appointed.                                                                                           | 8/13/2018                | Approved 8/13/18                                                                                                                                                                                  |
| 400          | P   | Petition to Sell or Mortgage Real Property; CHANGE OF NAME                             |     |               | X   | New name, format, instructions; add address of property;and re-ordered requested information                                                                                                                          | 8/13/2018                | Approved 8/13/18                                                                                                                                                                                  |
| 460          | P   | Decree for Sale or Mortgage of Real Property                                           | X   |               |     | Complete review including addition of address of property                                                                                                                                                             | 8/13/2018                | Approved 8/13/18                                                                                                                                                                                  |
| 411          | P   | Order and Agreement /Restriction on Control of Assets                                  | X   |               |     | Suggestion from court to bold text re: submission of evidence of deposit within 10 days of receipt of assets; also bold NOTE to return original to court.                                                             | 8/13/2018                | Approved 8/13/18                                                                                                                                                                                  |
| 462/<br>462A | P   | Decree: Final Account/Financial Report and Decrees: Periodic Account/Financial Reports | X   |               |     | Suggestion to include language that: account cannot be approved as filed and order that hearing is adjourned and fiduciary shall file amended account correcting deficiencies, similar to language on PC -461/PC-461A | 8/13/2018;               | The committee decided to remove language re: ability to amend account/financial report from PC-461 and PC-461A; final and periodic account/ financial report decrees will be reviewed at OCT. mtg |

## Forms for Consideration 8-13-18

|      |     |                                                                                               |   |  |   |                                                                                                                                                                                                |                              |                                                                            |
|------|-----|-----------------------------------------------------------------------------------------------|---|--|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------------------------------------------------------------------------|
| 502  | P/C | Petition/Temporary Custody                                                                    |   |  | X | Make clear that petitioner must include allegations of serious physical illness or injury or immediate threat thereof on Page 3.                                                               |                              | Approved 8/13/18                                                           |
| 505  | P/C | Petition/Appointment of Permanent Guardian                                                    |   |  | X | P.A. 18-45, Section 11, allows court to appoint a parent as permanent guardian; add reference to sole parent as petitioner; FOR OCTOBER, 2018 DEPLOYMENT                                       | 8/13/18, for discussion only |                                                                            |
| 565  | P/C | Decree/Appointment of Permanent Guardian <b>CHANGE TITLE</b>                                  | X |  |   | <b>CHANGE TITLE;</b> P.A. 18-45, Section 11, allows court to appoint parent as permanent guardian; add reference to sole parent as petitioner/permanent guardian; FOR OCTOBER, 2018 DEPLOYMENT | 8/13/18, for discussion only | Approved 8/13/18                                                           |
| 507  | P   | Motion to transfer Guardianship of Person/Estate of Minor/Trust/Change of Residence NEW TITLE |   |  | X | New title, format and instructions; add reference change of residence and request to transfer trust; Query: Do we want to include reference to the trust in the title?                         | 8/13/2018                    | Approved 8/13/18; Committee decided not to reference "trust" in the title. |
| 566  | P   | Decree/ Transfer Guardianship of Person/ Estate of Minor/ Change of Residence NEW TITLE       | X |  |   | New title, add reference to transfer trust; Query: Do we want to include reference to the trust in the title?                                                                                  | 8/13/2018                    | Approved 8/13/18; Committee decided not to reference "trust" in the title. |
| 5614 | P/C | Decree/ Transfer Guardianship of Person/TPR/Pending Case                                      | X |  |   | New decree pursuant to PA 18-45 Section 8; for January 1, 2019 deployment                                                                                                                      | 8/13/2018                    | Approved 8/13/18                                                           |
| 7706 | P/C | Agreement of GID with authority to manage protected person's finances                         |   |  | X | New form for GID with authority to manage finances to agree to carry out duties as assigned by court, per committee request 6/4/18                                                             | 8/13/2018                    | Approved 8/13/18                                                           |

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|     |     |                                       |   |  |   |                                                                                                                                                                                                    |                              |                  |
|-----|-----|---------------------------------------|---|--|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------|
| 907 | P   | Petition for Paternity                |   |  | X | Add instruction to include JD-FM-164; add questions about other court proceedings affecting custody and UCCJEA; remove boxes re: representations to the court and make representations hard coded. | 8/13/2018                    | Approved 8/13/18 |
| 966 | P   | Decree/Paternity                      | x |  |   | Reference added re: other court proceedings, UCCJE and space for other findings                                                                                                                    | 8/13/2018                    | Approved 8/13/18 |
| 921 | P/C | Order of Notice/Emancipation of Minor | X |  |   | Text changes per P.A.18-45, Section 15, to provide for regular mail notice to parent who is petitioner or who resides or is absent from the state.<br>FOR OCTOBER DEPLOYMENT                       | 8/13/18, for discussion only | Approved 8/13/18 |