

**MINUTES OF THE SEPTEMBER 11, 2017 MEETING  
OF THE PROCEDURES REVIEW COMMITTEE**

**The following were in attendance at the meeting:** Hon. Jennifer Berkenstock, Chair; Hon. Diane Blick; Hon. Robert Randich; Hon. Peter Barrett; Hon. Philip Wright; Susan Meagher, Chief Clerk, Berlin Probate Court; 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

**Call to order:** The meeting was called to order at 9:05 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 11:45 a.m.

Respectfully submitted,

*Diane S. Blick*

Hon. Diane S. Blick, Secretary

**NO MEETING ON SEPTEMBER 25, 2017**

**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON**

**MONDAY, OCTOBER 30, 2017 at 9:00 a.m.**

**IN THE LIBRARY AT PROBATE ADMINISTRATION**

Forms for Consideration at 9-11-17 Meeting

PC#/old CM #	P/C	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
560	P/C	Decree/Removal of Guardian	X		Make separate finding re: best interests of the child after findings re: grounds; Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6; Make finding re: appropriateness of guardian	6/26/2017; 9/11/17	Approved 9-11-17
561	P/C	Decree/Immediate Temporary Custody	X		Add reference to the custodian affidavit that must be filed with a petition for an ITC; add reference to hearing on Temporary Custody if ITC is denied under C.G.S. section 45a-607 (c )	6/26/2017; 9/11/17	Approved 9-11-17
562	P/C	Decree/Temporary Custody	X		Add finding re: appropriateness of proposed temporary custodian; Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6	09/11/17	Approved 9-11-17
565	P/C	Decree Appointing Permanent Guardian	X		Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6	09/11/17	Approved 9-11-17
660	P/C	Decree/Termination of Parental Rights	X		Make separate finding re: best interests of the child after findings re: grounds; Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6	09/11/17	Approved 9-11-17
581	C	Receipt of Information re Confidential Probate Proceedings (Children's Matters)		X	Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6	09/11/17	Approved 9-11-17
582	C	Receipt of Information re Confidential Probate Proceedings (Specific Children's Matter)		X	Replace Probate Court Officer with Family Specialist effective 1-1-18 per P.A. 17-136 section 6	09/11/17	Approved 9-11-17

Forms for Consideration at 9-11-17 Meeting

PC#/old CM #	P/C	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
510	P/C	Custodian's Affidavit		X	New Format and Instructions re when to be filed with PC-501, Immediate Temporary Custody Petition	09/11/17	Approved 9-11-17
550	P/C	Physicians Evaluation		X	New Format and Instructions re when to be filed with PC-501, Immediate Temporary Custody Petition	09/11/17	Approved 9-11-17
700	P/C	Petition/Guardianship of Person With Intellectual Disability		X	Add request to manage funds up to \$10,000 per P.A. 17-136, section 18, effective 1-1-18	09/11/17	Approved 9-11-17
760	P/C	Decree/Appointment of Guardian of Person with Intellectual Disability	X		Add authorization to manage funds up to \$10,000, per P.A. 17-136, section 18 effective 1-1-18; Make finding that respondent is intellectually disabled as defined in CGS section 1-1-g	09/11/17	Approved 9-11-17
770	P/C	Assessment Team Evaluation/Guardianship of Person with Intellectual Disability			New Format with instructions; Add "Is the protected person functioning adaptively and intellectually within the severe or profound range of intellectual disability?"; Add request for information re ability to manage funds up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18	09/11/17	Approved 9-11-17
770A	P/C	DDS Professional or Assessment Team Evaluation: Guardianship of Person with Intellectual Disability		X	New Format with instructions; Add request for information re ability to manage funds up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18	09/11/17	Approved 9-11-17
7007	P/C	Petition/Authority of Guardian to Manage Funds of Protected Person		X	New petition re: authorization to manage funds up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18	09/11/17	Approved 9-11-17

Forms for Consideration at 9-11-17 Meeting

PC#/old CM #	P/C	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
7608	P/C	Decree/Authority of Guardian to Manage Funds of Protected Person			New Decree re: authorization to manage funds up to \$10,000, per P.A. 17-136, section 18, effective 1-1-18	09/11/17	Approved 9-11-17
563A	P	Decree/Appointment of Guardian of Estate/Authority to Settle Doubtful or Disputed Claim	X		Add language re prohibition against transferring payment rights under structured settlement without court approval per P.A. 17-136, section 16	09/11/17	Approved 9-11-17
360	P	Decree/Appointment of Conservator	X		Add date and name of agent re: statement that respondent has executed a POA /Health care agent: <b>The respondent has executed a power of attorney dated____, designating_____as agent.</b> Replace language in Notice to Conservator section re: requirement to obtain prior approval for change of residence (for those courts that do not reference POA). Eliminate Successor Conservator if not appointed; and N/A if COP or COE not appointed	09/11/17	Approved 9-11-17
3620	P	New Decree re Transfer of Initial Jurisdiction For Conservatorships	X		Detailed decree re findings for transfer of initial jurisdiction in conservatorship matter	09/11/17	Approved 9-11-17
367	P	Decree/Transfer of File/Conservatorship Matter	X		Eliminate language accepting transfer given new electronic transfer of files	09/11/17	Approved 9-11-17
566	P	Decree/Transfer File/Guardianship of Person/Estate of Minor	X		Eliminate language accepting transfer given new electronic transfer of files	09/11/17	Approved 9-11-17

Forms for Consideration at 9-11-17 Meeting

PC#/old CM #	P/C	Form Name	CMS	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action Complete
764	P/C	Decree/Transfer of File/Guardianship of Person with Intellectual Disability	X		Eliminate language accepting transfer given new electronic transfer of files	09/11/17	Approved 9-11-17