

Statistics Committee

Minutes of Regular Meeting

September 8, 2018 at Probate Court Administration

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

Other members in attendance: Attorney Bonnie Bennet; Attorney Evan Brunetti, Chief Clerk; Judge Scott Chadwick; Ms. Lori Errico, Chief Clerk; Judge John McGrath; Judge Andrea Truppa; and Judge Philip Wright.

The minutes of the August 11, 2017 meeting were approved unanimously.

Evan Brunetti reviewed with the committee the comments he has received when discussing this committee's work with other clerks, including those in the Regional Children's Probate Courts. Among those topics were ITC; removal hearings; family case conferences; inclusion of PCO activities in analysis; appointment of a co-guardian; no parent guardianships. The committee made adjustments to the following activities in the Guardian of the Person case type based upon these comments:

- Appointment of Co-Guardian of a Minor was assigned a weight of 5.
- Appointment of Guardian of a Minor – No Parent or Guardian was assigned a weight of 6.
- Family Case Conferences were assigned a weight of 3.

The committee continued its review of individual activities of the court starting with mentally ill, non-committed individuals and concluding at adoption matters. The committee will begin its continued review at the next meeting with the termination of parental rights activities.

The committee decided that it should add the following activities to the GID case type to reflect the changes resulting from Public Act 17-136 sections 18-20, which will permit a guardian to handle up to \$10,000 of the ward's funds: manage finances, interim accounts and interim financial reports, final accounts and final financial reports, compel account on the court's own motion and on the motion of a party, and release of funds.

Judge McGrath will review GID statutes regarding the five year review of a person put into placement through the DDS process.

The next two meetings are scheduled for October 13<sup>th</sup> and November 3<sup>rd</sup>.

Meeting adjourned at 12:00 noon.

Submitted by John McGrath, Secretary

September 9, 2017

# Tally Rules Document

| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| <b>Fee Waivers</b>   |   |                           |                |            |
| Fee Waiver   |   | Y                         | .5             | 2          |
| <b>Decedent Estates</b>  |   |                           |                |            |
| <b>Decedent Regular Estates</b>                                  |   |                           |                |            |
| 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.<br>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                    | <del>Inactive.</del> 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   | <del>Only the first return counts.</del>                                     | N                         | 1              | 3          |
| CT-706 NT Amendment (New)                               |  |                           |                | 1          |
| CT-706/709  | <del>Only the first return counts.</del>                                     | 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  | <del>Does not count in Will Contests.</del>                                  | 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 |
|--|--|---------------------------|----------------|------------|
| <b>Decedent Estate Affidavit and TPO</b>           |  |                           |                |            |
| 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          |
| <b>Decedent Estates Tax Purposes Only</b>          |  |                           |                |            |
| 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          |
| <b>Decedent Estate 4a-16 Case</b>                  |  |                           |                |            |
| 4a-16 Petition                                     |  | Y                         | 0              | 2          |
| Status Conference                                  | User must enter subject of conference.   | Y                         | 2              | 4          |
| <b>Decedent Estate Will for Filing Only</b>        |  |                           |                |            |
| Affidavit and Will are entered as form received.   |  | Y                         | 0              | 1          |
| <b>Decedent General</b>                            |  |                           |                |            |
| 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          |
|   |  |                           |                |            |
| <b>Trusts</b>   |  |                           |                |            |
| <b>Testamentary Trust</b>                                       |  |                           |                |            |
| 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   | <del>Inactive.</del> <b>Activate Activity</b>   | 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 <b>greater than 5 million dollars, then the point value will be 6.</b> | 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 <b>greater than 5 million dollars, then the point value will be 8.</b>  | 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 <b>greater than 5 million dollars, then the point value will be 8.</b> | 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 <b>greater than 5 million dollars, then the point value will be 8.</b> | 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 <b>greater than 5 million dollars, then the point value will be 8.</b> | 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 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          |
| <b>Trust – CASE TYPE NO LONGER ACTIVE</b>                 |  |                           |                |            |
| 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              |            |
| <b>Trust Living</b>   |  |                           |                |            |
| 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          |
| Enforcement of Pet Trust  |  | Y                         | 3              | 6          |
| Establish Trust   | Is this needed in Living Trusts?   | 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          |
| <del>Permission to List Real Estate</del>                 |  | 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 for Failure to File Documents (CMS) 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 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          |
| <b>Trust Other</b>  |  |                           |                |            |
| 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                            | <del>Inactive.</del> 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            |
| <b>Removal for Failure to File Documents (CMS) NEW</b>   |  |                           |                | 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            |
| <b>Virtual Representation (New)</b>  |  |                           |                | 2            |
|  |  |                           |                |              |
|  |  |                           |                |              |
| <b>Conservators</b>  |  |                           |                |              |
| <b>Conservatorship of Person Involuntary</b>   |  |                           |                |              |
| 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*          |
| <b>Appointment of Conservator of the Person – Involuntary for the Sole Purpose of Psychiatric Medication</b> | 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            |
| <del>Appointment of Temporary Conservator</del>  | <del>Inactive.</del>   | <del>Y</del>              | <del>3</del>   | <del>-</del> |
| Appointment of Temporary Conservator of Person – Involuntary   | New 10/1/16. Replaces 'Appointment of Temporary Conservator'.                                  | Y                         | 3              | 10*          |
| <del>Appointment of Temporary Conservator Ex Parte</del>   | <del>Inactive.</del>   | <del>Y</del>              | <del>2</del>   | <del>-</del> |

# 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              | 5          |
| 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.   | N                         | 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          |
| 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          |

# Tally Rules Document

| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Removal of Fiduciary   |   | Y                         | 3              | 7          |
| Removal of Fiduciary on Court's Own Motion                                       |   | Y                         | 3              | 7          |
| <b>Removal for Failure to File Documents (CMS) New</b>                           |   |                           | -              | 4          |
| <del>Resignation of Conservator and Appointment of Successor</del>               | 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          |
| <del>Sell or Dispose Household Furnishings</del>                                 | 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          |
| <del>Terminate Lease</del>   | 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          |
| <b>Conservatorship of Person Voluntary</b>                                       |   |                           |                |            |
| 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          |
| 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          |
| <b>Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease</b> | New activity combining 3 formerly separate activities   | Y                         | 2              | 6          |
| Compel or Prohibit Action by Fiduciary   | User must enter subject of petition.  | Y                         | 2              | 5          |
| Conflicts between Conservators   |   | Y                         | 4              | 8          |

# Tally Rules Document

| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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          |
| <del>Resignation of Conservator and Appointment of Successor</del> | Inactive.   | N                         | 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          |
| <del>Sell or Dispose Household Furnishings</del>                   | 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          |
| <del>Terminate Lease</del>   | Combined into new activity  | Y                         | 2              | -          |
| Transfer to Another Probate Court                                  |   | Y                         | 0              | 4          |
| Unseal File  |   | Y                         | 3              | 6          |
| Voluntary Admission by Conserved Person                            |   |                           | 3              | 6          |
| <b>Conservatorship of Estate - Involuntary</b>                     |   |                           |                |            |
| 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          |

# 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.                          | 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.   | Y                         | 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.   | Y                         | 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              | 2          |
| Compel or Prohibit Action by Fiduciary                                    | User must enter subject of petition.  | Y                         | 2              | 5          |
| 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          |
| 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          |

# Tally Rules Document

| Type of Activity/Form  | Rule   | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| 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          |
| <del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>              | Inactive.  | <del>Y</del>              | <del>3</del>   | -          |
| 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          |
| 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          |
| <b>Removal for Failure to File Documents (CMS) NEW</b>                                   |  |                           |                | 4          |
| Request for Reduction/Release of Bond  |  | Y                         | 0              | 2          |
| <del>Resignation of Conservator and Appointment of Successor</del>                       | Inactive.  | Y                         | 3              | -          |

# Tally Rules Document

| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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          |
| <del>Sell or Dispose Household Furnishings</del>                                 | Combined into new activity  | ✗                         | 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          |
| <del>Terminate Lease</del>   | 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          |
| <b>Conservator of Estate - Voluntary</b>   |   |                           |                |            |
| 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 the Estate – Voluntary                             |   | Y                         | 3              | 6          |
| 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          |
| 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          |
| <b>Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease</b> | New activity combining 3 formerly separate activities   |                           |                | 6          |
| Compel Account by Party  |   | Y                         | 2              | 4          |

# 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              | 5          |
| 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          |
| 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          |
| Hearing Management Conference                             |  | Y                         | 3              | 6          |
| 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          |
| 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          |
| Purchase Real Estate                                      |  | Y                         | 3              | 6          |
| Reconsider, Modify, Revoke Court Order                    |  | Y                         | 3              | 6          |
| Recusal with Hearing                                      |  | Y                         | 4              | 8          |
| 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              | 7          |
| Removal of Fiduciary on Court's Own Motion                |  | Y                         | 3              | 7          |
| Removal for Failure to File Documents (CMS)               |  |                           |                | 4          |

# 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 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          |
| Sale of Personal Property  |  | Y                         | 2              | 6          |
| Sale of Real Estate  |  | Y                         | 3              | 6          |
| Seal File  |  | Y                         | 3              | 6          |
| <del>Sell or Dispose Household Furnishings</del>                                 | Combined into new activity   | Y                         | 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          |
| <del>Terminate Lease</del>   | Combined into new activity   | Y                         | 2              | -          |
| Transfer to Another Probate Court  |  | Y                         | 0              | 4          |
| Try Title  |  | Y                         | 3              | 6          |
| Unseal File  |  | Y                         | 3              | 6          |
| <b>Conservatorship of Person and Estate – Involuntary</b>                        |  |                           |                |            |
| 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          |
| <del>Appointment of Temporary Conservator</del>                                  | Inactive.  | Y                         | 3              | -          |
| Appointment of Temporary Conservator of Person and Estate – Involuntary          | New 10/1/16. Replaces 'Appointment of Temporary Conservator'.                    | Y                         | 3              | 9          |
| <del>Appointment of Temporary Conservator Ex Parte</del>                         | Inactive.  | Y                         | 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          |

# 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              | 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  | <del>Inactive.</del> Activate Activity  | N                         | 0              | 2          |
| Compel or Prohibit Action by Fiduciary  | User must enter subject of petition.  | Y                         | 2              | 5          |
| 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         |
| Hearing Management Conference   |   | Y                         | 3              | 6          |
| <del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>                         | Inactive.   | N                         | 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          |

# 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.     | 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          |
| <del>Resignation of Conservator and Appointment of Successor</del>           | Inactive.  | <del>Y</del>              | <del>3</del>   | -          |
| 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          |
| Sale of Real Estate  |  | Y                         | 3              | 6          |
| Seal File  |  | Y                         | 3              | 6          |
| <del>Sell or Dispose Household Furnishings</del>                             | Combined into new activity   | <del>Y</del>              | <del>2</del>   | -          |
| Status Conference  | User must enter subject of conference.   | Y                         | 2              | 4          |
| Stay   |  | Y                         | 3              | 6          |
| Sterilization  |  | Y                         | 5              | 10         |

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| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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          |
| <b>Conservatorship of Person and Estate – Voluntary</b>                      |   |                           |                |            |
| Action on Probate Bond   |   | Y                         | 5              | 6          |
| Administrative Closing   |   | Y                         | 0              | 2          |
| Affidavit of Closing with Hearing  |   | Y                         | 0              | 2          |
| 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              | 4          |
| Appointment of Conservator of Person and Estate – Voluntary                  |   | Y                         | 3              | 6          |
| 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              | 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          |
| Change in DNR Order  |   | Y                         | 3              | 7          |
| Change of Residence/Sell or Dispose of Household Furnishings/Terminate Lease | New activity combining 3 formerly separate activities   |                           |                | 6          |
| Compel Account by Party  |   | Y                         | 2              | 5          |
| Compel Account on Court's Own Motion   | <del>Inactive.</del> Activate Activity  | Y                         | 0              | 2          |
| Compel or Prohibit Action by Fiduciary                                       | User must enter subject of petition.  | Y                         | 2              | 5          |
| 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          |

# Tally Rules Document

| Type of Activity/Form  | Rule   | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| 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              | 6          |
| 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          |
| Hearing Management Conference  |  | Y                         | 3              | 6          |
| 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          |
| 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          |
| Purchase Real Estate   |  | Y                         | 3              | 6          |
| Reconsider, Modify, Revoke Court Order                                       |  | Y                         | 3              | 6          |
| Recusal with Hearing   |  | Y                         | 4              | 8          |
| 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              | 7          |
| Removal of Fiduciary on Court's Own Motion                                   |  | Y                         | 3              | 7          |
| Removal for Failure to File Documents (CMS)                                  |  |                           |                | 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              | 6          |

# Tally Rules Document

| Type of Activity/Form   | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| 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  | Y                         | 2              | -          |
| Status Conference   | User must enter subject of conference.  | Y                         | 2              | 4          |
| Stay  |   | Y                         | 3              | 6          |
| Substitution of New Bond  |   | Y                         | 1              | 3          |
| Summon to Appear and Give Testimony                             |   | Y                         | 3              | 6          |
| Support Allowance   |   | Y                         | 2              | 5          |
| Terminate Lease   | Combined into new activity  | Y                         | 2              | -          |
| Transfer to Another Probate Court                               |   | Y                         | 0              | 3          |
| Try Title   |   | Y                         | 3              | 6          |
| Unseal File   |   | Y                         | 3              | 6          |
| Voluntary Admission by Conserved Person                         |   | Y                         | 3              | 6          |
|   |   |                           |                |            |
| <b>Guardianship Matters</b>                                     |   |                           |                |            |
| <b>Guardian of Estate</b>                                       |   |                           |                |            |
| 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                         | 3              | 8          |
| Allowance of Financial Report for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded.                          | Y                         | 3              | 8          |
| Appointment of Co-Guardian of Estate                            | This activity does not count if heard in conjunction with appointment of a guardian.                  | Y                         | 2              | 5          |
| Appointment of GAL on Petition of Party                         |   | Y                         | 1              | 2          |
| Appointment of Guardian of Estate and Compromise of Claim       |   | Y                         | 5              | 8          |
| Appointment of Guardian of the Estate                           |   | Y                         | 3              | 6          |
| 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              | 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          |
| 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              | 5          |
| Compromise of Claim   |   | Y                         | 3              | 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          |
| Establish Trust  |  | Y                         | 3              | 8          |
| Final Account  | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              | 8          |
| Final Financial Report   | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              | 8          |
| Hearing Management Conference                                  |  | Y                         | 3              | 6          |
| Interim Account  | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              | 8          |
| Interim Financial Report                                       | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              | 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              | 6          |
| Pro Hac Vice   |  | Y                         | 0              | 2          |
| Purchase Property  |  | Y                         | 3              | 6          |
| Reconsider, Modify, Revoke Court Order                         |  | Y                         | 3              | 7          |
| Recusal with Hearing   |  | Y                         | 4              | 6          |
| Reimburse Probate Fee from Estate                              |  | Y                         | 3              | 3          |
| 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              | 7          |
| Removal of Fiduciary on Court's Own Motion                     |  | Y                         | 3              | 7          |
| <b>Removal for Failure to File Documents (CMS)</b>             |  |                           |                | <b>4</b>   |
| Removal of Personal Property by Foreign Guardian               |  | Y                         | 3              | 6          |
| Request for Reduction/Release of Bond                          |  | Y                         | 0              | 2          |
| Resignation of Guardian of Estate 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          |
| Status Conference  | User must enter subject of conference.                                       | Y                         | 2              | 4          |
| Stay   |  | Y                         | 3              | 6          |
| Substitution of New Bond                                       |  | Y                         | 1              | 3          |
| Summon to Appear and Give Testimony                            |  | Y                         | 3              | 6          |
| Transfer of Minor's Funds to UTMA Account                      |  | Y                         | 3              | 6          |

# 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          |
| Try Title  |   | Y                         | 3              | 6          |
| Unseal File  |   | Y                         | 3              | 6          |
|  |   |                           |                |            |
| <b>Guardian of Person</b>                                      |   |                           |                |            |
| Appointment of Co-Guardian of a Minor                          | This activity does not count if heard in conjunction with appointment of a guardian.    | Y                         | 3              | 5          |
| Appointment of GAL on Petition of Party                        |   | Y                         | 1              | 2          |
| Appointment of Guardian of a Minor - No Parent or Guardian     |   | Y                         | 3              | 6          |
| Appointment of New Counsel with Hearing                        |   | Y                         | 2              | 4          |
| Appointment of Successor Fiduciary                             | Replaces 'Appointment of Successor for Deceased Fiduciary'.                             | Y                         | 3              | -          |
| Approval/Instruction re: Action by Fiduciary                   | User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'. | Y                         | 2              | 6          |
| Articulation   |   | Y                         | 0              | 2          |
| Compel or Prohibit Action by Fiduciary                         | User must enter subject of petition.  | Y                         | 2              | 5          |
| Contempt   |   | Y                         | 2              | 6          |
| Disclosure of Medical Information                              |   | Y                         | 3              | 6          |
| Discovery Motion   |   | Y                         | 2              | 4          |
| Dispute Re: Standby-Guardian                                   |   | Y                         | 4              | 8          |
| Family Case Conference   |   | Y                         | 0              | 3          |
| Guardians Report/Guardianship of the Person of a Minor         |   | Y                         | .5             | 2          |
| Hearing Management Conference                                  |   | Y                         | 3              | 6          |
| Immediate Temporary Custody                                    |   | Y                         | 3              | 6          |
| In-Court Review for Possible Modification of Court Order       |   | Y                         | 3              | 6          |
| Mediation  |   | Y                         | 0              | 2          |
| Objection  | User must enter subject of objection.   | N                         | 0              | 2          |
| Permanent Guardian   |   | Y                         | 3              | 8          |
| Pro Hac Vice   |   | Y                         | 0              | 2          |
| Reconsider, Modify, Revoke Court Order                         |   | Y                         | 3              | 6          |
| Recusal with Hearing   |   | Y                         | 4              | 8          |
| Reinstatement of Parent as Guardian                            |   | Y                         | 4              | 8          |
| Removal of Guardian of the Person                              |   | Y                         | 4              | 8          |
| Resignation of Guardian of Person and Appointment of Successor |   | Y                         | 3              | 6          |
| Seal File  |   | Y                         | 3              | 6          |
| Special Immigrant Juvenile Finding                             |   | Y                         | 3              | 5          |
| Status Conference  | User must enter subject of conference.  | Y                         | 2              | 4          |
| Stay   |   | Y                         | 3              | 6          |

# Tally Rules Document

| Type of Activity/Form                                      | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Summon to Appear and Give Testimony                        |   | Y                         | 3              | 6          |
| Temporary Custody - No Parent or Guardian                  |   | Y                         | 3              | 7          |
| Temporary Custody Pending Removal of Guardian              |   | Y                         | 4              | 8          |
| Temporary Guardian   |   | Y                         | 3              | 7          |
| Transfer to Another Probate Court                          |   | Y                         | 0              | 4          |
| Transfer to Superior Court                                 |   | Y                         | 2              | 5          |
| Unseal File  |   | Y                         | 3              | 6          |
| Visitation on Motion of a Party                            |   | Y                         | 3              | 7          |
|  |   |                           |                |            |
| <b>Mentally Ill, Non-Committed</b>                         |   |                           |                |            |
| Appointment of GAL on Petition of Party                    |   | Y                         | 1              | 2          |
| Articulation   |   | Y                         | 0              | 2          |
| Contempt   |   | Y                         | 2              | 6          |
| Continuation of DCF Care or Placement (Voluntary)          | Replaces 'DCF Initial Permanency Hearing'.    | Y                         | 4              | 4          |
| Disclosure of Medical Information                          |   | Y                         | 3              | 6          |
| Discovery Motion   | Delete activity                               | N                         | 2              | -          |
| Family Case Conference                                     |   | Y                         | 0              | 3          |
| Hearing Management Conference                              |   | Y                         | 3              | 6          |
| In-Court Review for Possible Modification of Court Order   |   | Y                         | 3              | 6          |
| 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          |
| Review of DCF Case Service Plan                            | Replaces 'DCF Subsequent Permanency Hearing'. | Y                         | 4              | 4          |
| Review of DCF Permanency Plan (Voluntary)                  | Replaces 'DCF Subsequent Permanency Hearing'. | Y                         | 4              | 4          |
| Review of Termination of DCF Care or Placement (Voluntary) |   | Y                         | 3              | 6          |
| Seal File  |   | Y                         | 3              | 6          |
| Status Conference  | User must enter subject of conference.        | Y                         | 2              | 4          |
| Stay   |   | Y                         | 3              | 6          |
| Summon to Appear and Give Testimony                        |   | Y                         | 3              | 6          |
| Unseal File  |   | Y                         | 3              | 6          |
|  |   |                           |                |            |
| <b>Emancipation</b>  |   |                           |                |            |
| Appointment of GAL on Petition of Party                    |   | Y                         | 1              | 2          |
| Articulation   |   | Y                         | 0              | 2          |
| Contempt   |   | Y                         | 2              | 6          |
| Disclosure of Medical Information                          |   | Y                         | 3              | 6          |
| Discovery Motion   |   | Y                         | 2              | 4          |

# Tally Rules Document

| Type of Activity/Form  | Rule   | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Emancipation of Minor  |  | Y                         | 5              | 7          |
| Family Case Conference   |  | Y                         | 0              | 3          |
| Hearing Management Conference                                    |  | Y                         | 3              | 6          |
| Mediation  |  | Y                         | 0              | 2          |
| 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          |
| Seal File  |  | Y                         | 3              | 6          |
| Status Conference  | User must enter subject of conference.   | Y                         | 2              | 4          |
| Stay   |  | Y                         | 3              | 6          |
| Summon to Appear and Give Testimony                              |  | Y                         | 3              | 6          |
| Unseal File  |  | Y                         | 3              | 6          |
|  |  |                           |                |            |
| <b>Paternity</b>   |  |                           |                |            |
| Articulation   |  | Y                         | 0              | 2          |
| Blood/DNA Test Order - Motion by Party                           |  | Y                         | 3              | 4          |
| Contempt   |  | Y                         | 2              | 6          |
| Disclosure of Medical Information                                |  | Y                         | 3              | 6          |
| Discovery Motion   |  | Y                         | 2              | 4          |
| Family Case Conference   |  | Y                         | 0              | 3          |
| Hearing Management Conference                                    |  | Y                         | 3              | 6          |
| News Media Coverage  |  | Y                         | 3              | 7          |
| Mediation  |  | Y                         | 0              | 2          |
| Objection  | User must enter subject of objection.  | N                         | 0              | 2          |
| Paternity Claim  |  | Y                         | 4              | 7          |
| Pro Hac Vice   |  | Y                         | 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          |
| Summon to Appear and Give Testimony                              |  | Y                         | 3              | 6          |
| Unseal File  |  | Y                         | 3              | 6          |
|  |  |                           |                |            |
| <b>Guardian of Persons with Intellectual Disabilities</b>        |  |                           |                |            |
| Administrative Closing   |  | Y                         | 0              | 2          |
| Appointment of Co-Guardian                                       | This activity does not count if heard in conjunction with appointment of a guardian. | Y                         | 2              | 4          |
| Appointment of GAL on Petition of Party                          |  | Y                         | 1              | 2          |
| Appointment of Guardian of Person with Intellectual Disabilities |  | Y                         | 4              | 8          |

# Tally Rules Document

| Type of Activity/Form   | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Appointment of New Counsel with Hearing                                       |   | Y                         | 2              | 4          |
| Appointment of Stand-by or Stand-by Co-Guardian                               | This activity does not count if heard in conjunction with appointment of a guardian.    | Y                         | 2              | 4          |
| Appointment of Successor Fiduciary  | Replaces 'Appointment of Successor for Deceased Fiduciary'.                             | Y                         | 2              | 5          |
| Approval/Instruction re: Action by Fiduciary                                  | User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'. | Y                         | 2              | 6          |
| Articulation  |   | Y                         | 0              | 2          |
| Change in DNR Order   |   | Y                         | 3              | 7          |
| Compel Account by Party (New)   |   |                           |                | 4          |
| Compel Account on Court's Own Motion (New)                                    |   |                           |                | 2          |
| Compel or Prohibit Action by Fiduciary  | User must enter subject of petition.  | Y                         | 2              | 5          |
| Competency to Vote  |   | Y                         | 3              | 6          |
| Conflicts between Guardian and Conservator (45a-679)                          |   | Y                         | 4              | 8          |
| Contempt  |   | Y                         | 2              | 6          |
| Disclosure of Medical Information   |   | Y                         | 3              | 6          |
| Discovery Motion  |   | Y                         | 2              | 4          |
| Dispute Re: Health Care Decisions/Health Care Representatives                 |   | Y                         | 5              | 9          |
| Final Account (New)   |   |                           |                | 6          |
| Final Financial Report (New)  |   |                           |                | 6          |
| Five Year Review Hearing Re: Placement of person with Intellectual Disability |   | Y                         | 2              | 6          |
| Guardian's Report / Guardianship of the Person with Intellectual Disabilities |   | Y                         | .5             | 2          |
| Habeas Corpus   |   | Y                         | 5              | 10         |
| Hearing Management Conference   |   | Y                         | 3              | 6          |
| Interim Account (New)   |   |                           |                | 6          |
| Interim Financial Report (New)  |   |                           |                | 6          |
| Life Support System   |   | Y                         | 5              | 10         |
| Manage Finances (New)   |   |                           |                | 6          |
| Mediation   |   | Y                         | 0              | 2          |
| Objection   | User must enter subject of objection.   | N                         | 0              | 2          |
| Placement of Person with Intellectual Disabilities                            |   | Y                         | 4              | 8          |
| Pro Hac Vice  |   | Y                         | 0              | 2          |
| Release of Funds(New)   |   |                           |                | 2/5        |
| 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 (CMS)   |   |                           |                | 4          |

# Tally Rules Document

| Type of Activity/Form   | Rule   | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Resignation of Guardian of Person with Intellectual Disabilities and Appointment of a Successor |  | Y                         | 2              | 4          |
| Review of Placement   |  | Y                         | 3              | 6          |
| Seal File   |  | Y                         | 3              | 6          |
| 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          |
| Temporary Limited Guardian of a Person with Intellectual Disabilities                           |  | Y                         | 4              | 8          |
| Three Year Review - No Hearing - Guardian of a Person with Intellectual Disabilities            |  | Y                         | 2              | 5          |
| Three Year Review Hearing   |  | Y                         | 2              | 7          |
| Transfer to Another Probate Court   |  | Y                         | 0              | 4          |
| Unseal File   |  | Y                         | 3              | 6          |
| Visitation  |  | Y                         | 3              | 7          |
|   |  |                           |                |            |
| <b>Adoptions and Terminations</b>   |  |                           |                |            |
| <b>Adoptions</b>  |  |                           |                |            |
| Appointment of GAL on Petition of Party   |  | Y                         | 1              | 2          |
| Appointment of Statutory Parent   |  | Y                         | 1              | 2          |
| Approval of Adoption - Co-parent  |  | Y                         | 4              | 7          |
| Approval of Adoption - Relative   |  | Y                         | 4              | 7          |
| Approval of Adoption - Statutory Parent (DCF Identified)  |  | Y                         | 4              | 7          |
| Approval of Adoption - Statutory Parent (DCF Non-Identified)                                    |  | Y                         | 4              | 7          |
| Approval of Adoption - Statutory Parent (Private Agency Identified)                             |  | Y                         | 4              | 7          |
| Approval of Adoption - Statutory Parent (Private Agency Non-Identified)                         |  | Y                         | 4              | 7          |
| Approval of Adoption - Step-Parent  |  | Y                         | 4              | 7          |
| Approval of Adult Adoption  |  | Y                         | 2              | 4          |
| Articulation  |  | Y                         | 0              | 2          |
| Certificate of Birth Registration   |  | Y                         | 0              | 3          |
| Determination of Age/Date of Birth of Adopted Person Born Outside US                            |  | Y                         | 2              | 4          |
| Enforce or Modify Postadoption Agreement  |  | Y                         | 3              | 7          |
| Family Case Conference  |  | Y                         | 0              | 3          |
| Mediation   |  |                           | 0              | 2          |
| Objection   | User must enter subject of objection.          | N                         | 0              | 2          |
| Obtain Identifying Information (Appoint GAL)  | Replaces 'Obtain Identifying Information'.     | Y                         | 1              | 2          |
| Refusal of Agency to Release Information  | Replaces 'Obtain Non-Identifying Information'. | Y                         | 1              | 2          |

# Tally Rules Document

| Type of Activity/Form  | Rule  | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Original Birth Certificate by Adult Adoptee                    |   | Y                         | 1              | 2          |
| Placement for Out-of State Adoption                            |   | Y                         | 3              | 4          |
| <del>Pre-Adoption Conference</del>                             |   | Y                         | 0              |            |
| Pro Hac Vice   |   | Y                         | 0              | 2          |
| Reconsider, Modify, Revoke Court Order                         |   | Y                         | 3              | 6          |
| Recusal with Hearing   |   | Y                         | 4              | 8          |
| Release of Medical Information Re: Adoptee (C.G.S. 45a-754(d)) |   | Y                         | 2              | 4          |
| Special Immigrant Juvenile Finding                             |   | Y                         | 3              | 5          |
| Status Conference  | User must enter subject of conference.  | Y                         | 2              | 4          |
| Stay   |   | Y                         | 3              | 6          |
| Summon to Appear and Give Testimony                            |   | Y                         | 3              | 6          |
| Validation of Foreign Adoption                                 |   | Y                         | 2              | 4          |
|  |   |                           |                |            |
| <b>Termination of Parental Rights</b>                          |   |                           |                |            |
| Appointment of GAL on Petition of Party                        |   | Y                         | 1              |            |
| Appointment of Statutory Parent                                |   | Y                         | 1              |            |
| Approval/Instruction re: Action by Fiduciary                   | User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'. | Y                         | 2              |            |
| Articulation   |   | Y                         | 0              |            |
| Compel or Prohibit Action by Fiduciary                         | User must enter subject of petition.  | Y                         | 2              |            |
| Contempt   |   | Y                         | 2              |            |
| Disclosure of Medical Information                              |   | Y                         | 3              |            |
| Discovery Motion   |   | Y                         | 2              |            |
| Enforce or Modify Postadoption Agreement                       |   | Y                         | 3              |            |
| Family Case Conference   |   | Y                         | 0              |            |
| Hearing Management Conference                                  |   | Y                         | 3              |            |
| Mediation  |   | Y                         | 0              |            |
| Objection  | User must enter subject of objection.   | N                         | 0              |            |
| Permanency Plan Hearing  |   | Y                         | 3              |            |
| Pro Hac Vice   |   | Y                         | 0              |            |
| Reconsider, Modify, Revoke Court Order                         |   | Y                         | 3              |            |
| Recusal with Hearing   |   | Y                         | 4              |            |
| Seal File  |   | Y                         | 3              |            |
| Special Immigrant Juvenile Finding                             |   | Y                         | 3              |            |
| Status Conference  |   | Y                         | 2              |            |
| Stay   |   | Y                         | 3              |            |
| Summon to Appear and Give Testimony                            |   | Y                         | 3              |            |
| Temporary Custody Pending Termination of Parental Rights       |   | Y                         | 4              |            |
| Termination of Parental Rights                                 |   | Y                         | 5              |            |
| Transfer to Superior Court                                     |   | Y                         | 2              |            |

# Tally Rules Document

| Type of Activity/Form   | Rule                                   | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Unseal File   |  | Y                         | 3              |            |
| Visitation on Motion of a Party   |  | Y                         | 3              |            |
| <b>ElectroConvulsion Therapy</b>  |  |                           |                |            |
| Appointment of GAL on Petition of Party   |  | Y                         | 1              |            |
| Appointment of New Counsel with Hearing   |  | Y                         | 2              |            |
| Disclosure of Medical Information   |  | Y                         | 3              |            |
| Disclosure of Sealed Records  |  | Y                         | 3              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Objection   | User must enter subject of objection.  | N                         | 0              |            |
| Permission for Shock Therapy  |  | Y                         | 5              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Reconsider, Modify, Revoke Court Order  |  | Y                         | 3              |            |
| Recusal with Hearing  |  | Y                         | 4              |            |
| Status Conference   | User must enter subject of conference. | Y                         | 2              |            |
| <b>Commitments</b>  |  |                           |                |            |
| <b>Commitment Adult</b>   |  |                           |                |            |
| Annual Review Hearing   |  | Y                         | 4              |            |
| Annual Review/Appointment of Psychiatrist - No Hearing                          |  | Y                         | 2              |            |
| Appointment of GAL on Petition of Party   |  | Y                         | 1              |            |
| Appointment of New Counsel with Hearing   |  | Y                         | 2              |            |
| Articulation  |  | Y                         | 0              |            |
| Biennial Review Hearing   |  | Y                         | 4              |            |
| Commitment- Alcohol & Drug Dependency   |  | Y                         | 5              |            |
| Commitment at Expiration of Term of Imprisonment                                |  | Y                         | 5              |            |
| Commitment of Adult – Involuntary   |  | Y                         | 5              |            |
| Contempt  |  | Y                         | 2              |            |
| Disclosure of Medical Information   |  | Y                         | 3              |            |
| Disclosure of Sealed Records  |  | Y                         | 3              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Drug & Alcohol Recommitments  |  | Y                         | 3              |            |
| Habeas Corpus   |  | Y                         | 5              |            |
| Hearing Management Conference   |  | Y                         | 3              |            |
| Judicial Commitment for Treatment of Tuberculosis - Continuing Commitment Order |  | Y                         | 3              |            |
| Judicial Commitment for Treatment of Tuberculosis - Initial Commitment Order    |  | Y                         | 3              |            |
| Objection   | User must enter subject of objection.  | N                         | 0              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Probable Cause Hearing - Adult Commitment                                       |  | Y                         | 4              |            |

# 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 from Confinement  |  | Y                         | 4              |            |
| Status Conference   | User must enter subject of conference. | Y                         | 2              |            |
| Stay  |  | Y                         | 3              |            |
| Summon to Appear and Give Testimony                             |  | Y                         | 3              |            |
| Termination of Alcohol and Drug Commitment                      |  | Y                         | 4              |            |
| Warrant Enforcement Examination of Respondents Re: Tuberculosis |  | Y                         | 3              |            |
| Warrant for Examination by Court                                |  | Y                         | 3              |            |
|   |  |                           |                |            |
| <b>Commitment - Child</b>                                       |  |                           |                |            |
| Appointment of GAL on Petition of Party                         |  | Y                         | 1              |            |
| Appointment of New Counsel with Hearing                         |  | Y                         | 2              |            |
| Articulation  |  | Y                         | 0              |            |
| Commitment of Child – Involuntary                               |  | Y                         | 5              |            |
| Contempt  |  | Y                         | 2              |            |
| Disclosure of Medical Information                               |  | Y                         | 3              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Hearing Management Conference                                   |  | Y                         | 3              |            |
| Objection   | User must enter subject of objection.  | N                         | 0              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Probable Cause Hearing - Child Commitment                       |  | Y                         | 3              |            |
| Recommitment Hearing  |  | Y                         | 3              |            |
| Reconsider, Modify, Revoke Court Order                          |  | Y                         | 3              |            |
| Recusal with Hearing  |  | Y                         | 4              |            |
| Review of Status of Voluntary Patient                           |  | Y                         | 4              |            |
| Status Conference   | User must enter subject of conference. | Y                         | 2              |            |
| Stay  |  | Y                         | 3              |            |
| Summon to Appear and Give Testimony                             |  | Y                         | 3              |            |
| Transfer to Superior Court                                      |  | Y                         | 2              |            |
|   |  |                           |                |            |
| <b>Name Change</b>  |  |                           |                |            |
| Appointment of GAL on Petition of Party                         |  | Y                         | 1              |            |
| Articulation  |  | Y                         | 0              |            |
| Change of Name – Adult  |  | Y                         | 2              |            |
| Change of Name – Child  |  | Y                         | 3              |            |
| Change of Name – Family   |  | Y                         | 3              |            |
| Contempt  |  | Y                         | 2              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Hearing Management Conference                                   |  | Y                         | 3              |            |
| Mediation   |  | Y                         | 0              |            |
| News Media Coverage   |  | Y                         | 3              |            |

# Tally Rules Document

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| Type of Activity/Form   | Rule   | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Objection   | User must enter subject of objection.  | N                         | 0              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Reconsider, Modify, Revoke Court Order                        |  | Y                         | 3              |            |
| Recusal with Hearing  |  | Y                         | 4              |            |
| Seal File   |  | Y                         | 3              |            |
| Status Conference   | User must enter subject of conference.                                       | Y                         | 2              |            |
| Stay  |  | Y                         | 3              |            |
| Summon to Appear and Give Testimony                           |  | Y                         | 3              |            |
| Unseal File   |  | Y                         | 3              |            |
|   |  |                           |                |            |
| <b>Other Matters</b>  |  |                           |                |            |
| Action on Probate Bond  |  | Y                         | 5              |            |
| Appointment of an UTMA Custodian/Successor Custodian          |  | Y                         | 3              |            |
| Appointment of GAL on Petition of Party                       |  | Y                         | 1              |            |
| Approval of Cemetery Association Accounting                   | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              |            |
| Approval of Power of Attorney Accounting/Financial Report     | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              |            |
| Approval of UTMA Accounting                                   | Additional accounts/financial reports for the same time period are excluded. | Y                         | 3              |            |
| Articulation  |  | Y                         | 0              |            |
| Authorize DSS to Enter Premises for Assessment                |  | Y                         | 3              |            |
| Compel Cemetery Association Minutes or Accounting             |  | Y                         | 3              |            |
| Compel Power of Attorney Accounting                           |  | Y                         | 3              |            |
| Compel UTMA Accounting  |  | Y                         | 3              |            |
| Confirm Change in Gender                                      |  | Y                         | 1              |            |
| Construe POA Account  |  | Y                         | 3              |            |
| Contempt  |  | Y                         | 2              |            |
| Delayed Birth Registration                                    |  | Y                         | 3              |            |
| Disclosure of Medical Information                             |  | Y                         | 3              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Dispute Re: UTMA Accounts                                     |  | Y                         | 3              |            |
| Dispute Re: Health Care Decisions/Health Care representatives |  | Y                         | 5              |            |
| Enforce POA   | New 10/1/16  | Y                         | 3              |            |
| Hearing Management Conference                                 |  | Y                         | 3              |            |
| Injunction Requested by Department of Social Services         |  | Y                         | 3              |            |
| Isolation/Quarantine/Vaccination                              |  | Y                         | 3              |            |
| Life Support System   |  | Y                         | 5              |            |
| Marriage: Request for Permission (Minors)                     |  | Y                         | 1              |            |
| Mediation   |  | Y                         | 0              |            |
| News Media Coverage   |  | Y                         | 3              |            |
| Objection   | User must enter subject of objection.  | N                         | 0              |            |

# Tally Rules Document

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| Type of Activity/Form                                       | Rule                                   | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Order Authorizing Psychiatric Medication - 17a-543(f)       |  | Y                         | 5              |            |
| Preservation of Monuments and Gravestones                   |  | Y                         | 2              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Reconsider, Modify, Revoke Court Order                      |  | Y                         | 3              |            |
| Recusal with Hearing  |  | Y                         | 4              |            |
| Remove UTMA Custodian                                       |  | Y                         | 3              |            |
| Review Conduct of Agent (POA)                               | New 10/1/16.                           | Y                         | 3              |            |
| Seal File   |  | Y                         | 3              |            |
| Status Conference   | User must enter subject of conference. | Y                         | 2              |            |
| Stay  |  | Y                         | 3              |            |
| Sterilization   |  | Y                         | 5              |            |
| Summon to Appear and Give Testimony                         |  | Y                         | 3              |            |
| Terminate/Modify Orders of Isolation/Quarantine/Vaccination |  | Y                         | 3              |            |
| Transfer of Minor's Funds to UTMA Account                   |  | Y                         | 3              |            |
| Unseal File   |  | Y                         | 3              |            |
|   |  |                           |                |            |
| <b>Passports</b>  |  |                           |                |            |
| Passports   |  | Y                         | 0              |            |
|   |  |                           |                |            |
| <b>Restore Federal Firearms Rights</b>                      |  |                           |                |            |
| Appointment of GAL on Petition of Party                     |  | Y                         | 1              |            |
| Articulation  |  | Y                         | 0              |            |
| Contempt  |  | Y                         | 2              |            |
| Disclosure of Medical Information                           |  | Y                         | 3              |            |
| Discovery Motion  |  | Y                         | 2              |            |
| Hearing Management Conference                               |  | Y                         | 3              |            |
| Mediation   |  | Y                         | 0              |            |
| Objection   | User must enter subject of objection.  | N                         | 0              |            |
| Pro Hac Vice  |  | Y                         | 0              |            |
| Reconsider, Modify, Revoke Court Order                      |  | Y                         | 3              |            |
| Recusal with Hearing  |  | Y                         | 4              |            |
| Restore Right to Purchase, Possess, or Transport a Firearm  |  | Y                         | 5              |            |
| Seal File   |  | Y                         | 3              |            |
| Status Conference   |  | Y                         | 2              |            |
| Stay  |  | Y                         | 3              |            |
| Summon to Appear and Give Testimony                         |  | Y                         | 3              |            |
| Unseal File   |  | Y                         | 3              |            |