

**Probate Practice Book Advisory Committee
Subcommittee I**

Meeting Minutes

Tuesday, November 28, 2017
3:00 p.m.

Office of the Probate Court Administrator
186 Newington Road
West Hartford, CT

The meeting was convened at 3:07 p.m. by Judge Steven Zelman, Chair.

Other members in attendance: Attorney Molly Ackerly, Attorney Bonnie Bennet, Attorney Douglas Brown, Attorney Karen Gano, Attorney Paul Hudon, Mr. Stephen Pedneault, CPA, and Attorney Greta Solomon

Members Not Present: Judge Michael Darby

Also in attendance: Judge Paul Knierim, Probate Court Administrator

Remarks of the Chair

Judge Zelman welcomed the members of the subcommittee. He announced that the purpose of the meeting was to review the list of issues for the 2019 edition of the Probate Court Rules of Procedure for their consideration.

Discussion of List of Topics Assigned to Subcommittee I

The Office of the Probate Court Administrator is planning to launch a new eFiling system for the Probate Courts by 2019. The major focus for Subcommittee I will be to review the existing rules and make recommendations for new and revised rules that provide for eFiling.

Judge Paul Knierim attended the meeting to provide background information for the committee's deliberations. He discussed the overall plan for eFiling in the Probate Courts, including the goals for the new system and the timeline for development and deployment. He outlined some of the preliminary concepts for the new system, which include filing of documents and payment of fees through an electronic portal; authentication of users – attorneys, self-represented parties and non-attorney professionals; access to case documents by parties. While the system will initially involve fillable forms, it is anticipated that the system will ultimately support an online interview process to generate filings based on the answers given by the filer. Judge Knierim reported that the Office of the Probate Court Administrator will issue a Request for Proposals for the eFiling initiative by the end of this year. The RFP will focus on conservatorships with the expectation that the system would be expanded to other areas of jurisdiction in the future.

The members of the committee discussed this new initiative at length, raising insightful questions and offering valuable input for the development of the eFiling system for the Probate Courts. The committee's role will be to draft rules that are broad enough to encompass procedures for a new eFiling system.

Toward this end, the committee will review sections of the Probate Court Rules of Procedure that require attention, beginning with Rule 7 (Filing Requirements), Rule 8 (Notice), Rule 9 (Counting Time Periods) and Rule 16 (Public Access to Hearings and Records). Before the next meeting, the committee will be provided with examples of the provisions of the Connecticut Practice Book that reference electronic filings as guidance. The committee also asked that rules from other states concerning electronic filings be reviewed.

Proposed Meeting Schedule

The next meeting will be held on Tuesday, January 9, 2018 from 3:00 p.m. to 6:00 p.m. at the Office of the Probate Court Administrator, 186 Newington Road, West Hartford, CT.

Adjournment

The meeting was adjourned at 5:00 p.m.

Approved January 9, 2018