

MINUTES OF THE MAY 3, 2021 MEETING  
OF THE PROCEDURES REVIEW COMMITTEE

**The following were in attendance at the meeting:** Hon. Jennifer Berkenstock, Region #14, Chair; Hon. Diane Blick, Litchfield Hills; Hon. Kathleen N. Maxham Fairfield; Hon. Robert A. Randich; Susan Meagher, Chief Clerk Berlin; Loreen (Lori) Michalak, Chief Clerk Shelton; Karen Parzych, Chief Clerk Madison-Guilford; Gale Pellegren, Chief Clerk Torrington Area; and Heather Dostaler and Alison Green of the Office of the Probate Court Administrator.

**The following were absent from the meeting:** Hon. Mark DeGennaro, West Haven

**Call to order:** The meeting was held virtually via WEBEX and was called to order at approximately 9:05 am.

**Old Business:** None

**New Business:** The Committee reviewed, discussed and took action on new and revised forms as shown and evidenced on the attached schedule.

The Committee will meet next on July 12, 2021 and at this time will be scheduled and conducted virtually.

**Adjournment:** Upon motion duly made and seconded, the meeting was adjourned at approximately 11:30 am.

Respectfully submitted,  
*Loreen Michalak*  
Loreen (Lori) Michalak,  
Secretary

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, JULY 12, 2021 AT 9:00AM  
AND WILL BE HELD VIRTUALLY**

| <b>PC #</b>   | <b>P/C</b> | <b>Form Name</b>                                      | <b>CMS</b> | <b>WEB</b> | <b>Suggested Change(s)/Action Taken</b>                                                                                                                                                                                           | <b>Date of Committee Review</b> | <b>Committee Action</b>                              |
|---------------|------------|-------------------------------------------------------|------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|------------------------------------------------------|
| PC-413B       | P          | Order Re: Withdrawal of Funds from Restricted Account | X          |            | Add option relating to transfer of funds at direction of minor after age of majority for guardian of estate of minor matters; Would not apply in other estates                                                                    | 3/1/2021;<br>5/3/2021           | Tabled without discussion 3/1/2021; Approved, 5/3/21 |
| PC-960        | P          | Decree/Change of Name                                 | X          |            | Reformat decree; Add option for "This order does not change the petitioner's birth name as it appears on the birth certificate. "; Add finding regarding persons required to register with DESPP                                  | 3/1/2021;<br>5/3/2021           | Tabled without discussion 3/1/2021; Approved, 5/3/21 |
| PC-24XX (New) | P          | Inventory/Decedent's Estates                          |            | X          | Create new inventory form for each estate case type to avoid confusion regarding reporting requirements                                                                                                                           | 5/3/2021                        | Approved, 5/3/21                                     |
| PC-34XX (New) | P          | Inventory/Conservatorships                            |            | X          | Create new inventory form for each estate case type to avoid confusion regarding reporting requirements                                                                                                                           | 5/3/2021                        | Approved, 5/3/21                                     |
| PC-440        | P          | NEW TITLE:<br>Inventory/Testamentary Trusts           |            | X          | NEW TITLE: Inventory/Testamentary Trusts; Create new inventory form for each case type to avoid confusion regarding reporting requirements; Note UTC definition of testamentary trust                                             | 5/3/2021                        | Rejected use of "PC-440" form number, 5/3/21         |
| PC-44XX (New) | P          | Inventory/Trusts                                      |            | X          | Create new inventory form for each case type to avoid confusion regarding reporting requirements; Title of form should refer to trust inventory and instructions explain UTC definition of testamentary trust and when applicable | 5/3/2021                        | Approved, 5/3/21                                     |

| <b>PC #</b>      | <b>P/C</b> | <b>Form Name</b>                                                                                           | <b>CMS</b> | <b>WEB</b> | <b>Suggested Change(s)/Action Taken</b>                                                                 | <b>Date of Committee Review</b> | <b>Committee Action</b> |
|------------------|------------|------------------------------------------------------------------------------------------------------------|------------|------------|---------------------------------------------------------------------------------------------------------|---------------------------------|-------------------------|
| PC-54XX<br>(New) | P          | Inventory/Guardians of Estates of Minors                                                                   |            | X          | Create new inventory form for each estate case type to avoid confusion regarding reporting requirements | 5/3/2021                        | Approved, 5/3/21        |
| PC-74XX<br>(New) | P          | Inventory/Guardians of Adults with Intellectual Disability with Authority to Manage Finances               |            | X          | Create new inventory form for each estate case type to avoid confusion regarding reporting requirements | 5/3/2021                        | Approved, 5/3/21        |
| PC-581           | P/C        | Receipt of Information RE: Confidential Probate Proceedings (Children's Matters)                           |            | X          | Review and revise form; Add instructions; Update format                                                 | 5/3/2021                        | Approved, 5/3/21        |
| PC-582           | P/C        | Receipt of Information RE: Confidential Probate Proceedings (Specific Children's Matter)                   |            | X          | Review and revise form; Add instructions; Update format                                                 | 5/3/2021                        | Approved, 5/3/21        |
| PC-682           | P/C        | NEW TITLE: Court Order/Request for Investigation by Department of Children and Families                    | X          |            | Review and revise form; Update for eFiling                                                              | 5/3/2021                        | Approved, 5/3/21        |
| PC-831           | P/C        | NEW TITLE: Citation and Return/Petition for Involuntary Commitment of Person with Psychiatric Disabilities | X          |            | Review and revise                                                                                       | 5/3/2021                        | Approved, 5/3/21        |
| PC-966           | P          | Decree/Paternity Claim                                                                                     | X          |            | Review and revise form                                                                                  | 5/3/2021                        | Approved, 5/3/21        |