

STATISTICS COMMITTEE

January 11, 2019

Probate Court Administration

The meeting was called to order at 10:00 A.M.

Present: Judge Dorval, Chair; Judge McGrath, Secretary; Judge Wright; Judge Wexler; Attorney Bonnie Bennet, PCA Chief Counsel; Attorney Evan Brunetti, PCA Counsel; Lori Errico, Chief Clerk, West Hartford Probate Court;

The Committee approved the minutes of the January 26, 2018 meeting as presented.

The Committee reviewed the comments and suggestions provided by staff and judges from various courts, including Judge Blick, Judge Green, Lisa Cardassi, Alice Fitzpatrick, Janet Firulli, Kathleen Maher, Maureen O'Connor, Jackie Troxel and Anne Holihan. The committee agreed to incorporate several of the suggestions into the revised tally sheet, as follows:

- : removing the distinction between accountings for trusts with assets in excess of five million dollars and those trusts with less than five million dollars. It was agreed that eight (8) points be awarded for all trust accountings as well as estate accountings;
- : review of CT 706 NT will be awarded 2 points and the review of a 706/709 will be awarded 4 points;
- : adjust change of name applications for a family to seven (7) points;
- : adjust action on a probate bond to seven (7) points;
- : adjust articulation to four (4) points;
- : adjust certificates releasing liens to three (3) points;
- : adjust claim by fiduciary to six (6) points;
- : adjust three year review – no hearing – GID to six (6) points
- : create a new activity for handling an application for the death of a tenant, three (3) points; and
- : create a new activity for scheduling a continuance (one per hearing), one (1) point.

The next committee meeting will be held February 8, 2019 at PCA, West Hartford to continue review of suggestions from Anne Holihan and Judge Wexler.

The meeting adjourned at 12:00 pm.

Submitted by J. McGrath, Secretary 1/18/19

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Fee Waivers | | | | |
| Fee Waiver | | Y | .5 | 2 |
| Decedent Estates | | | | |
| Decedent Regular Estates | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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. Replaces 'Advice/Approval of Action by Fiduciary | Y | 2 | 6 |
| 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 | 4 |
| 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 | 3 |
| Claim by Fiduciary | | Y | 3 | 6 |
| Closure for Dormancy | | Y | 0 | 2 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Compel Account by Party | | Y | 2 | 3 |
| Compel Account on Court's Own Motion | Inactive. Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| CT-706 NT | Only the first return counts. | N | 1 | 2 |
| CT-706 NT Amendment (New) | | N | - | 1 |
| CT-706/709 | Only the first return counts. | N | 1 | 4 |
| CT-706/709 Amendment (New) | | N | - | 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 | Does not count in Will Contests. | 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) | | Y | - | 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| News Media Coverage | | Y | 3 | 7 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Objection | User must enter subject of objection. | N | 0 | 2 |
| 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 | - | 0 | - |
| Presumption of Death | Not separate motion – part of petition for administration | - | 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) | | Y | - | 4 |
| Re-Open Estate for Appointment of Successor Fiduciary | See Appointment of Successor Fiduciary | - | 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 |
|---|--|---------------------------|----------------|------------|
| | | | | |
| | | | | |
| Decedent Estate Affidavit and TPO | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Affidavit Estate | The first Affidavit Estate counts as 5. Supplemental Estate Affidavit counts as 2. | Y | 2 | 5/2 |
| Allowance for Spouse or Family | | Y | 2 | 4 |
| Articulation | | Y | 0 | 4 |
| Certificate Releasing Liens | | Y | 0 | 3 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| CT-706 NT | Only the first return counts. | N | 1 | 3 |
| CT-706 NT Amendment (New) | | N | - | 1 |
| CT-706/709 | Only the first return counts. | N | 1 | 4 |
| CT-706/709 Amendment (New) | | N | - | 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 |
| Decedent Estates Tax Purposes Only | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Articulation | | Y | 0 | 4 |
| Certificate Releasing Liens | | Y | 0 | 3 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| CT-706 NT | Only the first return counts. | N | 1 | 3 |
| CT-706 NT Amendment (New) | | N | - | 1 |
| CT-706/709 | Only the first return counts. | N | 1 | 4 |
| CT-706/709 Amendment (New) | | N | - | 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 |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| TPO Estate | | Y | 0 | 0 |
| Decedent Estate 4a-16 Case | | | | |
| 4a-16 Petition | | Y | 0 | 2 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |
| Decedent Estate Will for Filing Only | | | | |
| Affidavit and Will are entered as form received. | | Y | 0 | 1 |
| Decedent General | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Access to Jointly-Owned Assets in Safe Deposit Box | | Y | 3 | 6 |
| Access To Safe Deposit Box to Obtain Will/Cemetery Deed | | Y | 0 | 2 |
| Articulation | | Y | 0 | 4 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Death of Tenant | | N | 0 | 3 |
| Estate Examiner for Limited Purposes | | Y | 2 | 4 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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 |
| Trusts | | | | |
| Testamentary Trust | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 or 4 | 8 |
| Allowance of Financial Report for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| 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 | Removed from Testamentary Trust; In TO | - | - | - |
| 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 | 6 |
| 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 | 4 |
| Compel Account by Party | | Y | 2 | 4 |
| Compel Account on Court's Own Motion | Inactive - Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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. | Y | 3 or 4 | 6 |
| Final Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Final Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Hearing Management Conference | | Y | 3 | 6 |
| Interim Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Interim Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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) | | Y | - | 4 |
| 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) | | N | - | 2 |
| Trust – CASE TYPE NO LONGER ACTIVE | | | | |
| 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 | - |
| 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 | - |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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 | - |
| 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 | - |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| 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 | - |
| Unseal File | | Y | 3 | - |
| Trust Living | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| Affidavit of Closing with Hearing | | Y | 0 | 3 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Allowance of Account for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Allowance of Financial Report for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Appointment of Trustee of Missing Person | Removed from Trust Living; In TO | - | - | - |
| 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 | 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 | 4 |
| Compel Account by Party | | Y | 2 | 4 |
| Compel Account for Inter Vivos Trust | Same as Compel Account by Party | Y | 3 | - |
| Compel Account on Court's Own Motion | Inactive- Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 | Remove Trust Living; In TO | - | - | - |
| Final Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Final Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Hearing Management Conference | | Y | 3 | 6 |
| Interim Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Interim Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Permission to List Real Estate | | 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 |
| 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 |
| Try Title | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| Virtual Representation (New) | | N | - | 2 |
| Trust Other | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 or 4 | 8 |
| Allowance of Financial Report for Resigned or Removed Fiduciary | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 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 |

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 | 4 |
| Compel Account by Party | | Y | 2 | 4 |
| Compel Account on Court's Own Motion | Inactive. Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Final Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Final Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Hearing Management Conference | | Y | 3 | 6 |
| Interim Account | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Interim Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 or 4 | 8 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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) | | Y | - | 4 |
| 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 |
| Virtual Representation (New) | | N | - | 2 |
| | | | | |
| | | | | |
| Conservators | | | | |
| Conservatorship of Person Involuntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| 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* |
| Appointment of Conservator of the Person – Involuntary for the Sole Purpose of Psychiatric Medication | New Activity | Y | - | 10* |
| Appointment of GAL on Petition of Party | | Y | 1 | 4 |
| Appointment of New Counsel with Hearing | | Y | 2 | 4 |
| Appointment of Successor Fiduciary Conservator of the Person | Replaces 'Appointment of Successor for Deceased Fiduciary'. | Y | 3 | 6 |
| Appointment of Temporary Conservator | Inactive. | Y | 3 | - |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Appointment of Temporary Conservator of Person – Involuntary | New 10/1/16. Replaces ‘Appointment of Temporary Conservator’. | Y | 3 | 10* |
| Appointment of Temporary Conservator Ex Parte | Inactive. | ✗ | 2 | - |
| 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 | 4 |
| 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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. | ✗ | 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |
| Pro Hac Vice | | Y | 0 | 2 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| 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 |
| 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) | | N | - | 4 |
| Resignation of Conservator and Appointment of Successor | 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 |
| Sell or Dispose Household Furnishings | 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 |
| Terminate Lease | 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 |
| Conservatorship of Person Voluntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| 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 – Conservator of the Person | 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 | 4 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Change in DNR Order | | Y | 3 | 7 |
| Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease (New) | 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 |
| 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| News Media Coverage | | Y | 3 | 7 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Pro Hac Vice | | Y | 0 | 2 |
| Release from Voluntary Representation (New) | | N | 0 | 3 |
| 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) | | Y | - | 4 |
| Resignation of Conservator and Appointment of Successor | Inactive. | Y | 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 |
| Sell or Dispose Household Furnishings | 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 |
| Terminate Lease | Combined into new activity | Y | 2 | - |

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 |
| Unseal File | | Y | 3 | 6 |
| Voluntary Admission by Conserved Person | | Y | 3 | 6 |
| Conservatorship of Estate - Involuntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 of Estate | 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 | 4 |
| Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease (New) | 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 | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Habeas Corpus | | Y | 5 | 10 |
| Hearing Management Conference | | Y | 3 | 6 |
| Hearing to Confirm or Revoke Ex Parte Appointment of Conservator | Inactive. | ✗ | 3 | - |
| 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 |
| Liquidate Structured Settlement (New) | | Y | - | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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) | | Y | - | 4 |
| 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 |
| Restoration | | Y | 3 | 7 |
| 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 | 2 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Support Allowance | | Y | 2 | 5 |
| Terminate Lease | 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 |
| Try Title | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| Conservator of Estate - Voluntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 of Estate | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| 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 | 4 |
| Change of Residence/Dispose or Sell Household Furnishings/Terminate Lease (New) | New activity combining 3 formerly separate activities | Y | - | 6 |
| Compel Account by Party | | Y | 2 | 4 |
| Compel Account on Court's Own Motion | Inactive. Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Liquidate Structured Settlement (New) | | Y | 0 | 6 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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 from Voluntary Representation (New) | | N | - | 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 |
| Removal for Failure to File Documents (CMS) (New) | | Y | - | 4 |
| 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 |
| 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 | 2 |
| 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 | 4 |
| Try Title | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| Conservatorship of Person and Estate – Involuntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 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 |
| Appointment of Temporary Conservator | Inactive. | Y | 3 | - |
| Appointment of Temporary Conservator of Person and 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 Person and 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 | 4 |
| 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) | 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 | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Court Review Re: Care of Conserved Person | | Y | 3 | 6 |
| Disclaimer by Fiduciary on behalf of Estate | | Y | 1 | 3 |
| Disclosure of Medical Information | | Y | 3 | 6 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| 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 |
| 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 and 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 |
| Life Support System | | Y | 5 | 10 |
| Liquidate Structured Settlement (New) | | Y | - | 6 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| 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) | | Y | - | 4 |
| Request for Reduction/Release of Bond | | Y | 0 | 2 |
| Resignation of Conservator and Appointment of Successor | Inactive. | ✗ | 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 | 7 |
| Restoration | | Y | 3 | 7 |
| 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 | ✗ | 2 | - |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |
| Stay | | Y | 3 | 6 |
| Sterilization | | Y | 5 | 10 |
| 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 |
| Conservatorship of Person and Estate – Voluntary | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Appointment of Successor Fiduciary Conservator of Person and Estate | 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 | 4 |
| 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 | Y | - | 6 |
| Compel Account by Party | | Y | 2 | 5 |
| Compel Account on Court's Own Motion | Inactive. Activate Activity | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Court Review Re: Care of Conserved Person | | Y | 3 | 6 |
| Disclaimer by Fiduciary on behalf of Estate | | 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Liquidate Structured Settlement (New) | | Y | - | 6 |
| Mediation | | Y | 0 | 2 |
| Mortgage of Real Estate | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 from Voluntary Representation (New) | | N | - | 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 |
| Removal for Failure to File Documents (CMS) (New) | | Y | - | 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 |
| 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 |
| | | | | |
| Guardianship Matters | | | | |
| Guardian of Estate | | | | |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| 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 | 4 |
| Compel Account by Party | | Y | 2 | 4 |
| Compel Account on Court's Own Motion | Inactive. Activate Activity | Y | - | 2 |
| Compel or Prohibit Action by Fiduciary | User must enter subject of petition. | Y | 2 | 5 |
| Compromise of Claim | | Y | 3 | 6 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclaimer by Fiduciary on behalf of Estate | | 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 |
| Liquidate Structured Settlement (New) | | Y | - | 6 |

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 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |
| Removal for Failure to File Documents (CMS) (New) | | Y | - | 4 |
| 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 |
| Transfer to Another Probate Court | | Y | 0 | 4 |
| Try Title | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| Guardian of Person | | | | |
| Acceptance of Children's Matter Sent to RCPC (New) | Only for intake by local court | N | - | 3 |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| 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 |

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 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 | 4 |
| Compel or Prohibit Action by Fiduciary | User must enter subject of petition. | Y | 2 | 5 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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 |
| 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Mentally Ill, Non-Committed | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Articulation | | Y | 0 | 4 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |
| Emancipation | | | | |
| Acceptance of Children's Matter Sent to RCPC (New) | Only for intake by local court | N | - | 3 |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Articulation | | Y | 0 | 4 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Discovery Motion | | Y | 2 | 4 |
| Emancipation of Minor | | Y | 5 | 7 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Family Case Conference | | Y | 0 | 3 |
| Hearing Management Conference | | Y | 3 | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |
| 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 |
| | | | | |
| Paternity | | | | |
| Acceptance of Children's Matter Sent to RCPC (New) | Only for intake by local court | N | - | 3 |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Articulation | | Y | 0 | 4 |
| Blood/DNA Test Order - Motion by Party | | Y | 3 | 4 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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 |
| | | | | |
| Guardian of Persons with Intellectual Disabilities | | | | |
| Action on Probate Bond (New) | | Y | - | 7 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| 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 |
| 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 | 4 |
| Change in DNR Order | | Y | 3 | 7 |
| Compel Account by Party (New) | | Y | - | 4 |
| Compel Account on Court's Own Motion (New) | | Y | - | 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 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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) | | Y | - | 6 |
| Final Financial Report (New) | | Y | - | 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) | | Y | - | 6 |
| Interim Financial Report (New) | | Y | - | 6 |
| Life Support System | | Y | 5 | 10 |
| Manage Protected Person's Finances (New) | | Y | - | 6 |
| Mediation | | Y | 0 | 2 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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) | | Y | - | 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 |
| 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 | 6 |
| Three Year Review Hearing | | Y | 2 | 7 |
| Transfer to Another Probate Court | | Y | 0 | 4 |
| Unseal File | | Y | 3 | 6 |
| Visitation | | Y | 3 | 7 |
| | | | | |
| Adoptions and Terminations | | | | |
| Adoptions | | | | |
| Acceptance of Children's Matter Sent to RCPC (New) | Only for intake by local court | N | - | 3 |
| Acceptance of Citation (New) | Only for court of judge accepting citation | Y | - | 1 |
| 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 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|---|---------------------------|----------------|------------|
| Approval of Adult Adoption | | Y | 2 | 4 |
| Articulation | | Y | 0 | 4 |
| Certificate of Birth Registration | | Y | 0 | 3 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| 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 | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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 |
| Original Birth Certificate by Adult Adoptee | | Y | 1 | 2 |
| Placement for Out-of State Adoption | | Y | 3 | 4 |
| Pre-Adoption Conference | | 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 |
| | | | | |
| Termination of Parental Rights | | | | |
| Acceptance of Children's Matter Sent to RCPC (New) | Only for intake by local court | N | - | 3 |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Appointment of Statutory Parent | | Y | 1 | 2 |
| 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 | 4 |
| Compel or Prohibit Action by Fiduciary | User must enter subject of petition. | Y | 2 | 5 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Discovery Motion | | Y | 2 | 4 |
| Enforce or Modify Postadoption Agreement | | Y | 3 | 7 |
| Family Case Conference | | Y | 0 | 3 |
| Hearing Management Conference | | Y | 3 | 6 |
| Immediate Temporary Custody (New in TPR) | | Y | 3 | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Permanency Plan Hearing | | Y | 3 | 5 |
| 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 |
| Special Immigrant Juvenile Finding | | Y | 3 | 5 |
| Status Conference | | Y | 2 | 4 |
| Stay | | Y | 3 | 6 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Temporary Custody Pending Termination of Parental Rights | | Y | 4 | 8 |
| Termination of Parental Rights | | Y | 5 | 10 |
| Transfer to Superior Court | | Y | 2 | 5 |
| Unseal File | | Y | 3 | 6 |
| Visitation on Motion of a Party | | Y | 3 | 7 |
| | | | | |
| ElectroConvulsion Therapy | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Appointment of New Counsel with Hearing | | Y | 2 | 4 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Disclosure of Sealed Records | | Y | 3 | 5 |
| Discovery Motion | | Y | 2 | 4 |
| Motion to Disqualify Counsel (New) | | Y | 0 | 6 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Permission for Shock Therapy | | Y | 5 | 10 |
| Pro Hac Vice | | Y | 0 | 2 |
| Reconsider, Modify, Revoke Court Order | | Y | 3 | 6 |
| Recusal with Hearing | | Y | 4 | 8 |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |
| | | | | |
| Commitments | | | | |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|--|--|---------------------------|----------------|------------|
| Commitment Adult | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Annual Review Hearing | | Y | 4 | 7 |
| Annual Review/Appointment of Psychiatrist - No Hearing | | Y | 2 | 4 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Appointment of New Counsel with Hearing | | Y | 2 | 4 |
| Articulation | | Y | 0 | 4 |
| Biennial Review Hearing | | Y | 4 | 7 |
| Commitment- Alcohol & Drug Dependency | MOVE TO A & D COMMITMENT | Y | 5 | 10 |
| Commitment at Expiration of Term of Imprisonment | | Y | 5 | 10 |
| Commitment of Adult – Involuntary | | Y | 5 | 10 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Disclosure of Sealed Records | | Y | 3 | 5 |
| Discovery Motion | | Y | 2 | 4 |
| Drug & Alcohol Recommitments | | Y | 3 | 8 |
| Expedited hearing re: administration of Involuntary medication under 17a-543 (g) New | | Y | 0 | 9 |
| Habeas Corpus | | Y | 5 | 10 |
| Hearing Management Conference | | Y | 3 | 6 |
| Judicial Commitment for Treatment of Tuberculosis - Continuing Commitment Order | MOVE TO OTHER | Y | 3 | 7 |
| Judicial Commitment for Treatment of Tuberculosis - Initial Commitment Order | MOVE TO OTHER | Y | 3 | 8 |
| Motion to Disqualify Counsel (New) | | | 0 | 6 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Pro Hac Vice | | Y | 0 | 2 |
| Probable Cause Hearing - Adult Commitment | | Y | 4 | 7 |
| Reconsider, Modify, Revoke Court Order | | Y | 3 | 6 |
| Recusal with Hearing | | Y | 4 | 8 |
| Release from Confinement | | Y | 4 | 8 |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |
| Stay | | Y | 3 | 6 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Termination of Alcohol and Drug Commitment | | Y | 4 | 8 |
| Warrant Enforcement Examination of Respondents Re: Tuberculosis | MOVE TO OTHER | Y | 3 | 7 |
| Warrant for Examination by Court | | Y | 3 | 7 |
| Commitment - Child | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|---|---------------------------|----------------|------------|
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Appointment of New Counsel with Hearing | | Y | 2 | 4 |
| Articulation | | Y | 0 | 4 |
| Commitment of Child – Involuntary | | Y | 5 | 10 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Discovery Motion | | Y | 2 | 4 |
| Hearing Management Conference | | Y | 3 | 6 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Pro Hac Vice | | Y | 0 | 2 |
| Probable Cause Hearing - Child Commitment | | Y | 3 | 7 |
| Recommitment Hearing | | Y | 3 | 7 |
| Reconsider, Modify, Revoke Court Order | | Y | 3 | 6 |
| Recusal with Hearing | | Y | 4 | 8 |
| Review of Status of Voluntary Patient | | Y | 4 | 8 |
| Status Conference | User must enter subject of conference. | Y | 2 | 4 |
| Stay | | Y | 3 | 6 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Transfer to Superior Court | | Y | 2 | 5 |
| | | | | |
| Name Change | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Articulation | | Y | 0 | 4 |
| Change of Name – Adult | | Y | 2 | 4 |
| Change of Name – Child | | Y | 3 | 7 |
| Change of Name – Family | | Y | 3 | 7 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Discovery Motion | | Y | 2 | 6 |
| Hearing Management Conference | | Y | 3 | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 6 |
| 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 |
| Seal File | | Y | 3 | 6 |

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 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| | | | | |
| Other Matters | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Action on Probate Bond | | Y | 5 | 7 |
| Appointment of an UTMA Custodian/Successor Custodian | | Y | 3 | 6 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Approval of Cemetery Association Accounting | Additional accounts/financial reports for the same time period are excluded. | Y | 3 | 6 |
| Approval of Power of Attorney Accounting/Financial Report | Additional accounts/financial reports for the same time period are excluded. | Y | 3 | 8 |
| Approval of UTMA Accounting | Additional accounts/financial reports for the same time period are excluded. | Y | 3 | 7 |
| Articulation | | Y | 0 | 4 |
| Authorize DSS to Enter Premises for Assessment | | Y | 3 | 7 |
| Compel Cemetery Association Minutes or Accounting | | Y | 3 | 4 |
| Compel Power of Attorney Accounting | | Y | 3 | 7 |
| Compel UTMA Accounting | | Y | 3 | 6 |
| Confirm Change in Gender | | Y | 1 | 4 |
| Construe POA | | Y | 3 | 7 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Delayed Birth Registration | | Y | 3 | 6 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Discovery Motion | | Y | 2 | 4 |
| Dispute Re: UTMA Accounts | | Y | 3 | 8 |
| Dispute Re: Health Care Decisions/Health Care representatives | | Y | 5 | 10 |
| Enforce POA | New 10/1/16 | Y | 3 | 7 |
| Expedited hearing re: administration of Involuntary medication under 17a-543 (g) (New) | | Y | - | 9 |
| Hearing Management Conference | | Y | 3 | 6 |
| Injunction Requested by Department of Social Services | | Y | 3 | 6 |
| Isolation/Quarantine/Vaccination | | Y | 3 | 8 |
| Life Support System | | Y | 5 | 10 |
| Approval of Marriage of a Minor Approve Marriage of Minor (new title) | | Y | 1 | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | N | - | 6 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|---|--|---------------------------|----------------|------------|
| News Media Coverage | | Y | 3 | 7 |
| Objection | User must enter subject of objection. | N | 0 | 2 |
| Order Authorizing Psychiatric Medication - 17a-543(f) | | Y | 5 | 9 |
| Preservation of Monuments and Gravestones | | Y | 2 | 5 |
| Pro Hac Vice | | Y | 0 | 2 |
| Reconsider, Modify, Revoke Court Order | | Y | 3 | 6 |
| Recusal with Hearing | | Y | 4 | 8 |
| Remove UTMA Custodian | | Y | 3 | 7 |
| Review Conduct of Agent (POA) | Possible combination with other POA activities | 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 |
| Terminate/Modify Orders of Isolation/Quarantine/Vaccination | | Y | 3 | 5 |
| Transfer of Minor's Funds to UTMA Account | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |
| Passports | | | | |
| Passports | | Y | 0 | 1 |
| Restore Federal Firearms Rights | | | | |
| Acceptance of Citation (New) | Only for court of judge accepting citation | N | - | 1 |
| Appointment of GAL on Petition of Party | | Y | 1 | 2 |
| Articulation | | Y | 0 | 4 |
| Contempt | | Y | 2 | 6 |
| Continuance Motion (NEW) | Filing of PC-101 or equivalent; only one per hearing | N | 0 | 1 |
| Disclosure of Medical Information | | Y | 3 | 6 |
| Discovery Motion | | Y | 2 | 4 |
| Hearing Management Conference | | Y | 3 | 6 |
| Mediation | | Y | 0 | 2 |
| Motion to Disqualify Counsel (New) | | Y | - | 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 |
| Restore Right to Purchase, Possess, or Transport a Firearm | | Y | 5 | 10 |
| Seal File | | Y | 3 | 6 |
| Status Conference | | Y | 2 | 4 |

Tally Rules Document

| Type of Activity/Form | Rule | Include in Statistics Y/N | Current Weight | New Weight |
|-------------------------------------|-------------|----------------------------------|-----------------------|-------------------|
| Stay | | Y | 3 | 6 |
| Summon to Appear and Give Testimony | | Y | 3 | 6 |
| Unseal File | | Y | 3 | 6 |