

STATISTICS COMMITTEE

February 8, 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 11, 2019 meeting as presented.

Bonnie informed the committee that she had started an analysis of all matters that have been awarded the same points, for example all matters marked a 10, a 9, an 8 etc. in order to be able to compare these activities to each other. The committee felt that this was a worthwhile additional perspective. Bonnie will see if this can be done for all categories. If so the committee will review it further at the next meeting.

The Committee continued its review of the comments and suggestions provided by staff and judges from various courts. The committee agreed to incorporate several of the suggestions into the revised tally sheet, including :

: approval/instruction re: action by fiduciary to 6 points;

: compel or prohibit an action by a fiduciary to 6 points;

: compel account by party to 4 points;

: construe will to 7 points;

: cy pres to 7 points;

: removal of fiduciary to 7 points;

: revoke a decree admitting will and admit later will to 5 points;

: try title to 7 points;

: affidavit estates to 6 points (supplemental affidavit has an additional two points);

: change in DNR order to 8 points;

: approval of fees (not heard in conjunction with an account or financial report) to 5 points;

- : probable cause to 8 points;
- : authority to consent to psychiatric medication to 9 points;
- : order authorizing psychiatric medication to 9 points;
- : confirm gender of person born out of state to 5 points;
- : emancipation of a minor to 9 points;
- : isolation/quarantine to 10 points;
- : terminate isolation/quarantine to 8 points

At the next meeting the committee will continue its review of comments, including those of Judge Green and review the comparison chart if it is possible to create the chart. The next meeting will be held at PCA on March 29<sup>th</sup> at 10 AM.

The meeting adjourned at 12:15 pm.

Submitted by J. McGrath, Secretary 2/14/19

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
<b>Fee Waivers</b>				
Fee Waiver		Y	.5	2
<b>Decedent Estates</b>				
<b>Decedent Regular Estates</b>				
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
<del>Appointment of Trustee of Missing Person</del>	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	5
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	4
Compel Account on Court's Own Motion	<del>Inactive.</del> <b>Activate Activity</b>	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	6
Compromise of Claim		Y	3	6
Construe Will		Y	3	7
Contempt	<b>Civil contempt only</b>	Y	2	6
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	N	0	1
CT-706 NT	<del>Only the first return counts.</del>	N	1	2
<b>CT-706 NT Amendment (New)</b>		N	-	1
CT-706/709	<del>Only the first return counts.</del>	N	1	4
<b>CT-706/709 Amendment (New)</b>		N	-	1
Cy Pres		Y	3	7
Determination of Claims Presented to Prior Fiduciary		Y	1	4
Determination of Domicile on DRS Motion		Y	3	6
Disclaimer by Fiduciary <b>on behalf of the Estate</b>		Y	1	3
Disclosure of Estate/Succession Tax Return		Y	3	5
Disclosure of Medical Information		Y	3	6
Discovery Motion	<del>Does not count in Will Contests.</del>	Y	2	4
Distribute Exempt Property to Spouse (Insolvent Estate)		Y	1	3
Establish Trust	Appointment of Testamentary Trustee is under case type TT.	Y	3	6
Excuse Account of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	3	4
Extend Claims Period		Y	2	4
Extension of Time For Filing Form CT-706 NT		N	0	1
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Hearing Management Conference		Y	3	6
Hearing on Disallowed Claim		Y	3	7
Inoperative Trust		Y	0	2
Insolvent Estate <b>with claims procedure</b>		Y	3	7
<b>Insolvent Estate without claims procedure (New)</b>		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
<b>Motion to Disqualify Counsel (New)</b>		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
<del>Permission to List Real Estate</del>	Approval of Action by Fiduciary	-	0	-
<del>Presumption of Death</del>	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 2 points 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	6
Removal for Failure to File Documents (CMS) (New)		Y	-	4
<del>Re-Open Estate for Appointment of Successor Fiduciary</del>	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	5
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	7
Unseal File		Y	3	6
Will Contest	With evidentiary hearing	Y	5	8

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
<b>Decedent Estate Affidavit and TPO</b>				
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	6/2
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
<b>Decedent Estates Tax Purposes Only</b>				
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
<b>Decedent Estate 4a-16 Case</b>				
4a-16 Petition		Y	0	2
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	N	0	1
Status Conference	User must enter subject of conference.	Y	2	4
<b>Decedent Estate Will for Filing Only</b>				
Affidavit and Will are entered as form received.		Y	0	1
<b>Decedent General</b>				
<b>Acceptance of Citation (New)</b>	<b>Only for court of judge accepting citation</b>	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
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	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
<b>Death of Tenant</b>		N	0	3
Estate Examiner for Limited Purposes		Y	2	4
<b>Motion to Disqualify Counsel (New)</b>		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
<b>Trusts</b>				
<b>Testamentary Trust</b>				
<b>Acceptance of Citation (New)</b>	<b>Only for court of judge accepting citation</b>	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
<del>Appointment of Trustee of Missing Person</del>	<b>Removed from Testamentary Trust; In TO</b>	-	-	-
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	5
Articulation		Y	0	4
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive</del> - <b>Activate Activity</b>	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	6
Construe Trust		Y	3	7
Contempt		Y	2	6
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	N	0	1
Cy Pres		Y	3	7
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
<b>Motion to Disqualify Counsel (New)</b>		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
<del>Permission to List Real Estate</del>		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 2 points 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	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	7
Unseal File		Y	3	6
Virtual Representation (New)		N	-	2
<b>Trust – CASE TYPE NO LONGER ACTIVE</b>				
Action on Probate Bond		Y	5	-
Administrative Closing		Y	0	-
Affidavit of Closing with Hearing		Y	0	-
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	-
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	-
<b>Trust Living</b>				
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	5
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	6
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	7
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 2 points 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	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	7
Unseal File		Y	3	6
Virtual Representation (New)		N	-	2
<b>Trust Other</b>				
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	5
Articulation		Y	0	4
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> Activate Activity	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	6
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	7
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
<del>Permission to List Real Estate</del>		<del>Y</del>	<del>0</del>	<del>-</del>
Pro Hac Vice		Y	0	2
<del>Purchase Property</del>	<del>Covered by Approve/Instruction re: Action by Fiduciary</del>	<del>Y</del>	<del>3</del>	<del>-</del>
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 2 points 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	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	7
Unseal File		Y	3	6
Virtual Representation (New)		N	-	2
<b>Conservators</b>				
<b>Conservatorship of Person Involuntary</b>				
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*
<del>Appointment of Temporary Conservator Ex Parte</del>	Inactive.	✗	<del>2</del>	-
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	5
Articulation		Y	0	4
Authority to Consent to Psychiatric Medication Treatment 17a-543(e)		Y	5	9
Change in DNR Order		Y	3	8
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	6
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
<del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>	Inactive.	✗	<del>3</del>	-
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
<b>Conservatorship of Person Voluntary</b>				
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	5
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	8
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	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
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
<b>Conservatorship of Estate - Involuntary</b>				
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	5
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	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

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Contempt		Y	2	6
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	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
<del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>	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
<b>Liquidate Structured Settlement (New)</b>		Y	-	6
Mediation		Y	0	2
<b>Motion to Disqualify Counsel (New)</b>		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 2 points 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	7
Unseal File		Y	3	6
<b>Conservator of Estate - Voluntary</b>				
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	5
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	<del>Inactive.</del> Activate Activity	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	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
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 2 points 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	7
Unseal File		Y	3	6
<b>Conservatorship of Person and Estate – Involuntary</b>				
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	5
Articulation		Y	0	4
Authority to Consent to Psychiatric Medication Treatment 17a-543(e)		Y	5	9
Change in DNR Order		Y	3	8
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	<del>Inactive.</del> Activate Activity	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	6
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
<del>Hearing to Confirm or Revoke Ex Parte Appointment of Conservator</del>	Inactive.	N	3	-
Hearing to Confirm or Revoke Ex Parte Appointment of Conservator of Person and Estate – Involuntary	New 10/1/16. Replaces Hearing to Confirm or Revoke Ex Parte Appointment of Conservator	Y	3	8
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 2 points and the fee is 0.00.	Y	1 or 3	2/5
Removal of Fiduciary		Y	3	7
Removal of Fiduciary on Court's Own Motion		Y	3	7
<b>Removal for Failure to File Documents (CMS) (New)</b>		Y	-	4
Request for Reduction/Release of Bond		Y	0	2
<del>Resignation of Conservator and Appointment of Successor</del>	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
<del>Sell or Dispose Household Furnishings</del>	<b>Combined into new activity</b>	✗	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
<del>Terminate Lease</del>	<b>Combined into new activity</b>	✗	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	7
Unseal File		Y	3	6
Voluntary Admission by Conserved Person		Y	3	6
<b>Conservatorship of Person and Estate – Voluntary</b>				
<b>Acceptance of Citation (New)</b>	<b>Only for court of judge accepting citation</b>	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	5
Articulation		Y	0	4
Change in DNR Order		Y	3	8
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	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	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
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 2 points 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	7
Unseal File		Y	3	6
Voluntary Admission by Conserved Person		Y	3	6
<b>Guardianship Matters</b>				
<b>Guardian of Estate</b>				

# 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	5
Articulation		Y	0	4
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	<del>Inactive.</del> Activate Activity	Y	-	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	6
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 2 points 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	7
Unseal File		Y	3	6
<b>Guardian of Person</b>				
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
<del>Appointment of Successor Fiduciary</del>	<del>Replaces 'Appointment of Successor for Deceased Fiduciary'.</del>	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	6
Contempt		Y	2	6
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	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
<b>Motion to Disqualify Counsel (New)</b>		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
<b>Mentally Ill, Non-Committed</b>				
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
<b>Emancipation</b>				
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	9



# 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
<b>Paternity</b>				
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
<b>Guardian of Persons with Intellectual Disabilities</b>				
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	8
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	6
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)	If this activity is ex parte, it is 2 points and the fee is 0.00.	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
<b>Adoptions and Terminations</b>				
<b>Adoptions</b>				
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

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Approval of Adoption - Step-Parent		Y	4	7
Approval of Adult Adoption		Y	2	4
Articulation		Y	0	4
Certificate of Birth Registration		Y	0	3
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	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
<b>Motion to Disqualify Counsel (New)</b>		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
<del>Pre-Adoption Conference</del>		Y	0	-
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Release of Medical Information Re: Adoptee (C.G.S. 45a-754(d))		Y	2	4
Special Immigrant Juvenile Finding		Y	3	5
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Validation of Foreign Adoption		Y	2	4
<b>Termination of Parental Rights</b>				
<b>Acceptance of Children's Matter Sent to RCPC (New)</b>	<b>Only for intake by local court</b>	N	-	3
<b>Acceptance of Citation (New)</b>	<b>Only for court of judge accepting citation</b>	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	6
Contempt		Y	2	6
<b>Continuance Motion (NEW)</b>	<b>Filing of PC-101 or equivalent; only one per hearing</b>	N	0	1

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
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
<b>ElectroConvulsion Therapy</b>				
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

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
<b>Commitments</b>				
<b>Commitment Adult</b>				
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	8
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
<b>Commitment - Child</b>				

# 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
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	8
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
<b>Name Change</b>				
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

# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6
<b>Other Matters</b>				
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 for Out-of-State Birth		Y	1	5
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	10
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



# Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Motion to Disqualify Counsel (New)		N	-	6
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	8
Transfer of Minor's Funds to UTMA Account		Y	3	6
Unseal File		Y	3	6
<b>Passports</b>				
Passports		Y	0	1
<b>Restore Federal Firearms Rights</b>				
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

# Tally Rules Document

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<b>Type of Activity/Form</b>	<b>Rule</b>	<b>Include in Statistics Y/N</b>	<b>Current Weight</b>	<b>New Weight</b>
Status Conference		Y	2	4
Stay		Y	3	6
Summon to Appear and Give Testimony		Y	3	6
Unseal File		Y	3	6