

## **PROBATE ADVISORY WORKGROUP MEETING**

**Thursday, October 26, 2017 at 9:00 a.m.**

Ralph L. Carr Judicial Center  
1300 Broadway, Denver, CO 80203  
1<sup>st</sup> Floor, Room 1F

Call-in Information:

ShoreTel Conference Call - Dial (720) 625-5050 and enter access code **88888888** followed by # key

### **AGENDA**

#### I. Call to Order

#### II. Business

##### A. Approval of April 28, 2017 Meeting Minutes

##### B. Action Items from April 28, 2017 Meeting

1. Connie sent a request to have proposed new form - JDF 705 – Probate Case Information Sheet added to CJD 05-01, giving courts the authority to seal the document.
2. Sherry emailed Emy regarding translating forms into Spanish. Connie will touch base with Emy after 11/17; the last day probate forms are open for public comment.
3. Probate Judges surveyed: When should the MHCM code be entered for adult guardianship cases being transferred to Colorado? In accordance with the responses received, the MHCM Code section instructs staff to enter the code when the Final Order is signed.

#### III. Announcements

- ##### A. Supplemental Charge for the Probate Advisory Workgroup to Address the Judicial Branch Public Administrators Performance Audit – August 2017 has Been Drafted

#### IV. New Business

##### A. Audit Recommendation #1/Judicial Branch's Response

##### 1. Materials Posted Online

- a. JDF 885 – Conservator's Report – Revised 8/17
- b. JDF 885 – Conservator's Report - Proposed Revisions Open for Public Comment Until 11/17
- c. Colorado Rules of Probate Procedure – Rule 31. Accountings and Reports – Proposed Revisions Open for Public Comment until 11/17

2. Materials Being Drafted

- a. Draft JDF XXX – Public Administrator’s Statement of Accounts Pursuant to Small Estate Procedure
- d. Draft Guidelines for the Operations of the Offices of the Public Administrators of the State of Colorado

B. Audit Recommendation #2.A.B.C. & D./Judicial Branch’s Response

1. Materials Posted Online

- a. Proposed Changes to the Judicial Resource Manual (JRM) – Party Information (Response to 2.B.)
- b. Proposed Changes to the Judicial Resource Manual (JRM) – Court Procedures for the Public Administrator Statement (Response to 2.B.)

2. Materials Being Drafted

- a. Draft Standard Public Administrator’s Annual Report (Response to 2.A. & C.)

C. Audit Recommendation #5.A./ Judicial Branch’s Response

1. Materials Being Drafted

- a. Draft Guidelines for the Operations of the Offices of the Public Administrators of the State of Colorado (Response to 5.A.)

D. Audit Recommendation #3.A. & B./Judicial Branch’s Response

1. Materials Being Drafted

- a. Draft Guidelines for the Operations of the Offices of the Public Administrators of the State of Colorado (Response to 3.A.)
- b. Draft legislative changes to C.R.S. 15-12-619(4) and (6) (Response to 3.B.)

V. Open Floor for Public Comments

VI. Next Meeting - Friday, December 15, 2017 @ 9:00 a.m.