

**Probate Committee
Judicial Conference of Indiana**

**March 17, 2016
Minutes**

1. Attendance: The following members participated in the meeting: William Davis, Steven Eichholtz, Peter Foley, Sherry Greg Gilmore, Stanley Levine, Andrea McCord, Jon Webster, Gerald Zore, and Diane Kavadias Schneider, chair.
2. Guest: Erica Costello, Division of State Court Administration.
3. Staff Assistance: The committee was provided staff assistance by Michelle Goodman.
4. Approval of minutes: The committee unanimously approved the October 2015 minutes.
5. Guardianship Registry: Michelle Goodman reported on the current status of the registry implementation. The committee requested staff to investigate opportunities to educate stakeholders on the use and value of this program. The committee also discussed the proposal for the Board of Director's meeting on recommending the registry become mandatory. The committee voted unanimously to recommend the draft proposed rule amendment. The committee also discussed requests from the counties to add functionality to the registry with additional alerts, letter format, report status, and electronic signatures. The committee also discussed the processing of temporary guardianship cases and the statutory requirements on when these cases expire by law. The committee agreed to consider this area in more detail in the future.
6. Adult Guardianship Office update: Erica Costello reported on the VASIA grants, which added 10 counties for a total of 26 programs in the state. Also, there will be a Guardianship Symposium held on May 13th and more information will be emailed out soon. The Adult Guardianship Office is also involved with two other projects. One is a technical assistance grant from National Center of State Courts to implement accounting and inventory reporting technologies. Elkhart and Marion Counties will be our state pilot sites. The second is a grant to work on addressing elder abuse and St. Joseph County is working on this initiative.
7. State Bar Probate Section update: The next section meeting is scheduled for April 30, 2016 at the ISBA offices in Indianapolis. Staff will provide more information to the committee as it becomes available.
8. Legislative update: Michelle Goodman reported on the probate related bills that passed this session – SEA 31, 371, and 253. Erica Costello reported on SEA 192. Ms. Goodman also provided the committee with an update on SB 331, which was proposed by this committee.
9. Request from Court Personnel Committee: The committee discussed a request from the Court Personnel Committee regarding access to forms for mental health cases. After discussion, the committee agreed that this should be left up to each court to determine what should be available. The committee also discussed some process in Elkhart County to make document processing for mental health cases more electronic.

10. Probate Deskbook update: The committee reviewed the remaining drafts for updating the Probate Deskbook – 1.01, 1.20, 5.00, 6.00, 7.00, 8.00, and 9.00. The committee requested staff to make the edits and prepare for publication.

11. 2016 meeting dates: The committee scheduled the following meeting dates to be held at the Indiana Judicial Center:

June 10 - 1:30 p.m. to 3:30 p.m.

August 5 - 1:30 p.m. to 3:30 p.m.

November 4 - 1:30 p.m. to 3:30 p.m.

Respectfully submitted,

Michelle Goodman
Staff Attorney