

A Look Back

*by Lisa Langton
Family Division Administrator -
Probate/Juvenile Register*



I would like to highlight several major undertakings and accomplishments of the Probate Court in 2005. Despite continual budget cuts and pressure to do more with less, our court managed last year to effectuate some major improvements.

First and foremost was the conversion of 4.5 million records from our county computer mainframe system to the State Court Administrative Office new Trial Court System (TCS). The conversion took place over the weekend of September 12, 2005. To prepare for the conversion, the court staff spent hundreds of hours working on data translation, new policy development and consultation with programmers. A select group of staff undertook weekly trips to Lansing to be trained on the new system, and these key individuals were our “train the trainers,” which was an indispensable portion of the successful conversion. The TCS system was designed to operate specifically within Michigan probate courts and we have found it to be extremely user-friendly. While we still have many policy developments to finalize and our data entry has been slowed down due to staff training, we hope to be well on track by the first quarter of this year with this new system.

I would like to extend a tremendous thank you to Terry Castiglione and Phill Debarr from our Data Technology Unit for their tremendous help and support throughout this program. I would also like to thank Jill Koney Daly, Mary Jo Best and Mary Batchelor for their continued oversight and work on this time-consuming project; and our wonderful staff trainers Colleen Bagazinski, Jerry Becigneul, Carol Esher, Maura Hodits, Cass Morgan, Heidi Pawley, Barbara Pickens, Kim Voss and Charlene Woods. This has been a job well done.

We also undertook some staff moves with the Mental Health office staff joining the Estates unit staff in the main Probate area, combining all public-service components at our front counter. This has proved to have increased our service to the public and provide more efficient service for those coming into our courts. We moved some non-public Probate functions to the office formerly known as the Mental Health office. In that regard, we also divided our Probate counter into three main Probate units: guardianship and conservatorship, estates and trusts, and mental health. We have seen an increase in efficiency with our counter service, as the staff has become specialized in those areas, can move the files through quickly, and answer more complicated and specialized questions for attorneys and the public.

As of March 2005, major changes in the Mental Health Code became effective. These statutes have been referred to as “Kevin’s Law.” The statutes created new proceedings for “assisted outpatient treatment.” Implementing these new proceedings involved collaboration between the Court, Corporation Counsel, Community Mental Health, Common Ground Sanctuary, Court Service Officers and local attorneys. With very little lead time to effectuate these major changes, the court worked hard to implement these initiatives quickly.

Significant court rule changes were approved on November 15, 2005, and became effective the same day. With no lead time, the staff worked quickly to implement changes and communicate these to the court’s stakeholders. The new requirements include:

- Death certificates or alternative documentation are required to start every decedent’s estate.
- The deduction for secured loans on property is included in the calculation of inventory fees.

- The listing on their inventories of all property a protected person owns jointly or in common with others.
- Conservators must serve all accounts on all interested persons annually and a proof of service must be filed with the court.
- Conservators of minors now must file an initial *Verification of Funds on Deposit* within 14 days of qualifications, and an annual *Verification* with a copy of the financial institution's statements with the Annual Account.
- All conservators, with their Annual Account, must present a copy of the financial institution's statements for all liquid assets dated within 30 days after the end of the accounting period.

All these were significant changes to our proceedings. The court did establish immediate policies for compliance. I will be detailing these court rules and their effect on your practice in the next few months in this column.

Finally, we were very happy to learn in October 2005 that the National College of Probate Judges selected Oakland County Probate Court's Web site as one of the top 10 Probate Court Web sites in the country. The announcement of this selection was made in November at the National College of Probate Judges banquet held in San Francisco, California. The 2005 competition drew courts from around the country to compete on the basis of Web site design, organization, use of technology and usefulness. I attribute the success of this Web site to our hardworking Probate and Data Technology staff for their input in developing this very easy-to-use and practical Web site.

I wish to thank and congratulate the Probate Court staff for all of their hard work and dedication during this very difficult year of changes. We also thank our Probate judges, who continue to provide us with support and guidance to assist us in serving our community and attorneys. Stay tuned!

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