

Probate and Mental Health Advisory Committee
Annual Agenda¹—2024–2025
Approved by Rules Committee: October 22, 2024

I. COMMITTEE INFORMATION

Chair:	Hon. Jayne Chong-Soon Lee, Judge, Superior Court of California, County of San Joaquin
Lead Staff:	Corby Sturges, Attorney, Center for Families, Children & the Courts
<p>Committee’s Charge/Membership: Rule 10.44 of the California Rules of Court states the charge of the Probate and Mental Health Advisory Committee, which is to make recommendations to the council for improving the administration of justice in proceedings involving, decedents’ estates, trusts, conservatorships, guardianships, and other probate matters; and mental health and developmental disabilities issues. Rule 10.44(b) sets forth additional duties of the committee. Rule 10.44(c) sets forth the membership position of the committee. The Probate and Mental Health Advisory Committee currently has 17 members. The current committee roster is available on the committee’s web page.</p>	
<p>Subgroups of the Advisory Committee:</p> <ol style="list-style-type: none"> 1. Legislation Subcommittee 2. Conservatorship Subcommittee 3. Guardianship Subcommittee 4. Mental Health Subcommittee 	
<p>Meetings Planned for 2024–2025 (Advisory body and all subgroups listed above.) Date/Time/Remote or Location if in person Full committee, the 3rd Thursday of each month (more frequent as warranted by committee workload), 4:30–5:30 pm, remote Legislation Subcommittee, every two–three weeks, February–August 2025, time TBD, remote Other subcommittees, as needed, remote <input type="checkbox"/> Check here if in-person meeting is approved by the internal committee oversight chair.</p>	

¹ The annual agenda outlines the work a committee will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and the Judicial Council staff resources.

II. COMMITTEE PROJECTS

#	New or One-Time Projects	
1.	<i>New project to recommend new and amended CARE Act rules and new and revised CARE Act forms</i>	<p><i>Priority² 1(a), 1(c)</i></p> <p><i>Strategic Plan Goal³ I, IV</i></p>
<p>Project Summary: The committee will develop a recommendation for new and amended rules and new and revised forms to implement the Community Assistance, Recovery, and Empowerment (CARE) Act (Welf. & Inst. Code, §§ 5970–5987), as amended by Senate Bill 42 (Umberg; Stats. 2024, ch. 640), Senate Bill 1323 (Menjivar; Stats. 2024, ch. 646), and Senate Bill 1400 (Stern; Stats. 2024, ch. 647), as well as to respond to requests from courts and the executive branch. The project is expected to include a revised petition (form CARE-100) that is easier for family members and other self-represented petitioners to complete; an alternative petition for use exclusively by licensed behavioral health professionals; rules to circumscribe the CARE Act court’s communication with criminal or mental health courts that have referred respondents to CARE Act proceedings as well as juvenile courts with jurisdiction over CARE Act respondents; a new form to give ongoing notice to original petitioners; and rules or standards regarding the role of the judiciary in improving system performance.</p> <p>Status/Timeline: New and amended rules and new and revised forms expected to take effect July 1, 2025, and January 1, 2026.</p> <p>Fiscal Impact/Staff Resources: Statutory amendments may impose costs and draw on trial court resources, but the rule amendments and form revisions themselves are unlikely to have a significant impact on the courts or the Judicial Council; staff resources include committee staff, Center for Families, Children & the Courts (CFCC), Legal Services, Governmental Affairs, and Editing and Graphics (EGG) staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, Department of Health Care Services, county behavioral health agencies, public</p> <p>AC Collaboration: TBD</p>		

² For non-rules and forms projects, select priority level 1 (must be done) or 2 (should be done). For rules and forms proposals, select one of the following priority levels: 1(a) Urgently needed to conform to or accurately reflect the law; 1(b) Council has directed the committee to consider new or amended rules and forms; 1(c) Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; or 1(d) Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk. *For each priority level 1 proposal, the advisory body must provide a specific reason why it should be done this year and how it fits within the identified category.* 2(a) Useful, but not necessary, to implement changes in law; 2(b) Responsive to identified concerns or problems; or 2(c) Helpful in otherwise advancing Judicial Council goals and objectives. *If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.*

³ Indicate which goal number of The Strategic Plan for California’s Judicial Branch the project most closely aligns.

#	New or One-Time Projects	
2.	<i>New revision of forms for petition for appointment of a probate conservator, order appointing a conservator, and letters of conservatorship</i>	<i>Priority² 1(a), 1(c)</i> <i>Strategic Plan Goal³ I, IV</i>
<p><i>Project Summary:</i> The committee will develop a recommendation for revisions to <i>Petition for Appointment of Probate Conservator</i> (form GC-310), <i>Order Appointing Probate Conservator</i> (form GC-340), and <i>Letters of Conservatorship</i> (form GC-350). The recommendation will bring the forms into conformity with the conservatorship statutes, as amended by Assembly Bill 1194 (Stats. 2021, ch. 417) and Assembly Bill 1663 (Stats. 2022, ch. 894), simplify the forms, and make them more intuitive for self-represented petitioners and conservators to understand. The recommendation will also promote consistency with recently developed or revised forms, including <i>Confidential Supplemental Information</i> (form GC-312), <i>Confidential Declaration on Medical Ability to Attend Hearing—Probate Conservatorship</i> (form GC-325), <i>Confidential Capacity Assessment and Declaration—Probate Conservatorship</i> (form GC-335), and <i>Everyday Activities Attachment to Confidential Capacity Assessment and Declaration—Probate Conservatorship</i> (form GC-335A). If time and resources permit, the committee will also consider recommending conforming revisions to <i>Petition for Appointment of Temporary Conservator</i> (form GC-111), <i>Order Appointing Temporary Conservator</i> (form GC-141), and <i>Letters of Temporary Guardianship or Conservatorship</i> (form GC-151).</p> <p><i>Status/Timeline:</i> Revised forms expected to take effect January 1, 2026.</p> <p><i>Fiscal Impact/Staff Resources:</i> The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><i>Internal/External Stakeholders:</i> Trial courts, self-represented litigants, county public guardians and conservators, public</p> <p><i>AC Collaboration:</i> n/a</p>		
3.	<i>New project to recommend revisions to forms used to specify a conservator’s general duties and a conservatee’s general rights and approval of a new form for use to list the rights retained by a conservatee</i>	<i>Priority² 1(a), 1(c)</i> <i>Strategic Plan Goal³ I, IV</i>
<p><i>Project Summary:</i> The committee will develop a recommendation to revise <i>Notice of Conservatee’s Rights</i> (form GC-341), as required by Probate Code section 1830(c), and <i>Duties of Conservator</i> (form GC-348), as required by Probate Code section 1834(a), as well as a new form—either a standalone form or an attachment to form GC-341—for use to list the specific rights retained by the conservatee and any other information required by Probate Code section 1835.5 that is not already included in the order of appointment. AB 1663 (Stats. 2022, ch. 894)</p>		

#	New or One-Time Projects	
	<p>Status/Timeline: Revised forms expected to take effect January 1, 2026.</p> <p>Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: conservators, conservatees, trial courts, public</p> <p>AC Collaboration: n/a</p>	
4.	<p>New project to recommend adjusted dollar amounts for use to determine eligibility for succession to decedent's property without full estate administration and revision of forms that include those amounts</p>	<p>Priority² 1(a), 1(c), 1</p> <p>Strategic Plan Goal³ I, IV</p>
	<p>Project Summary: The committee will develop a recommendation to adjust the dollar amounts used to determine eligibility for succession to property without administration and revise the forms that include those amounts. Probate Code section 890 requires the Judicial Council, once every three years on April 1, to adjust specified property values used for determining eligibility for succession to a decedent's property without full administration and to publish a list of those values. The last adjustment and revision took effect April 1, 2022; the next is due April 1, 2025. In addition, Assembly Bill 2016 (Maienschein; Stats. 2024, ch. 331) requires a specific adjustment to one of these amounts on the same date.</p> <p>Status/Timeline: Adjusted amounts and conforming form revisions must take effect April 1, 2025.</p> <p>Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff, as well as possible collaboration with Information Technology staff to publish adjusted amounts on the web.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, self-represented litigants, successors to interests in property of decedents</p> <p>AC Collaboration: n/a</p>	
5.	<p>New project to recommend revision of forms DE-310 and DE-315 to conform to changes to the statutory process to determine succession to real property in estates of small value</p>	<p>Priority² 1(a), 1(c)</p> <p>Strategic Plan Goal³ I, IV</p>

#	New or One-Time Projects	
	<p>Project Summary: The committee will develop a recommendation for revisions to forms DE-310 and DE-315 to conform to changes made by Assembly Bill 2016 (Maienschein; Stats. 2024, ch. 331) to the statutory process for determining succession to a decedent’s real property located in California if the value of the estate falls below a specified amount.</p> <p>Status/Timeline: Revised forms expected to take effect April 1, 2025.</p> <p>Fiscal Impact/Staff Resources: No projected fiscal impact; staff resources include committee staff, Legal Services staff, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, public</p> <p>AC Collaboration: n/a</p>	
6.	One-time revision of Handbook for Conservators	<p>Priority² 1</p> <p>Strategic Plan Goal³ I, IV</p>
	<p>Project Summary: The committee and staff continue developing updates and revisions to the Judicial Council’s <i>Handbook for Conservators</i> to reflect recent changes to the law, simplify the language, and reorganize the <i>Handbook</i> to make it more user-friendly for conservators to access online. Probate Code section 1835 requires the council to develop an information package, to make that package available to the courts, and periodically to update the package when changes to the law warrant. (Prob. Code, § 1835(c), (e).) The courts may use the information package to fulfill their duty, under Probate Code section 1835(a)–(b), to provide conservators with specified information. The Judicial Council approved the first edition of the <i>Handbook</i> in 1991 to serve as the information package required by section 1835; it was published in 1992. The second edition was published in 2002. The Rules Committee approved work on the third edition of the <i>Handbook</i> in this committee’s 2015 and 2016 annual agendas. The council approved the third edition, effective October 28, 2016. Changes to the law since the last edition and a shift to primarily online use require another round of updates.</p> <p>Status/Timeline: Committee staff anticipates submitting the revised handbook for Judicial Council approval in early to mid-2025.</p> <p>Fiscal Impact/Staff Resources: No projected fiscal impact to trial courts or Judicial Council; staff resources include committee staff, CFCC staff, Legal Services staff, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, conservators, public</p>	

#	New or One-Time Projects	
	<i>AC Collaboration:</i> n/a	
7.	<i>One-time report to the Legislature on court effectiveness in conservatorship cases</i>	<i>Priority² 1</i> <i>Strategic Plan Goal³ I, IV</i>
<p><i>Project Summary:</i> Probate Code section 1458 (added by Assembly Bill 1194; Stats. 2021, ch. 417, § 4) requires the Judicial Council to “report to the Legislature the findings of a study measuring court effectiveness in conservatorship cases, including the effectiveness of protecting the legal rights and best interests of a conservatee.” The statute requires the report to include specific caseload statistics and to recommend “statewide performance measures to be collected, best practices to protect the legal rights of conservatees, and staffing needs to meet case processing requirements.” Council staff, working with a contractor, have finalized the research tool and are selecting courts for participation. Case file review and data collection will begin in fall 2024. Once the data are collected, the contractor will analyze the data and draft the report. The committee will serve as a resource to staff on the recommendations to be included in the report. It will review the final report and recommend council approval and submission to the Legislature.</p> <p><i>Status/Timeline:</i> Report to the Legislature due January 1, 2027.</p> <p><i>Fiscal Impact/Staff Resources:</i> Minimal fiscal impact to trial courts; Judicial Council staff has engaged a consultant using funds appropriated for that purpose. Committee staff, CFCC research staff, and the consultant are collaborating on the research that will serve as the basis of the report’s conclusions and recommendations.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><i>Internal/External Stakeholders:</i> Legislature, trial courts, persons interested in conservatorship proceedings</p> <p><i>AC Collaboration:</i> n/a</p>		
8.	<i>New project to recommend amendment of rules and revision of forms related to transfer of conservatorships into California under the California Conservatorship Jurisdiction Act.</i>	<i>Priority² 1(a), 1(c)</i> <i>Strategic Plan Goal³ I, IV</i>
<p><i>Project Summary:</i> The committee will develop a recommendation to amend rule 7.1050 and revise forms GC-366, GC-368, and, perhaps, GC-367 to allow courts, in accepting transfer of a conservatorship into California from another state, a tribe, or a foreign country, to report determinations affecting voting rights of conservatees as required by elections Code section 2211.5, perform required monitoring of conservators, and make any modifications to out-of-state conservatorship orders necessary to conform to California law.</p> <p><i>Status/Timeline:</i> Rule amendments and form revisions expected to take effect January 1, 2026.</p>		

#	New or One-Time Projects	
	<p>Fiscal Impact/Staff Resources: No projected fiscal impact; staff resources include committee staff, Legal Services, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, public</p> <p>AC Collaboration: n/a</p>	
9.	<p>New project to recommend rule amendments and form revisions regarding notice that a guardian or conservator intends to change the residence of a ward or conservatee</p>	<p>Priority² 1(a), 1(c)</p> <p>Strategic Plan Goal³ I, IV</p>
	<p>Project Summary: The committee will develop a recommendation for amendments to rules 7.1013 and 7.1063 and revisions to forms GC-079, GC-079(MA), GC-080, and GC-080(MA) to implement changes made by Senate Bill 1106 (Rubio; Stats. 2024, ch. 455) to the requirements for notice of a guardian’s or conservator’s intent to change the residence of a ward or conservatee.</p> <p>Status/Timeline: Rule amendments and forms revisions expected to take effect July 1, 2025.</p> <p>Fiscal Impact/Staff Resources: No projected fiscal impact; staff resources include committee staff, Legal Services, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, system partners, public</p> <p>AC Collaboration: n/a</p>	
10.	<p>New project to consider recommending Judicial Council–sponsored legislation to amend Penal Code sections authorizing referral of defendants by criminal courts to CARE Act proceedings</p>	<p>Priority² 1</p> <p>Strategic Plan Goal³ I, IV</p>
	<p>Project Summary: In response to amendments to the Penal Code by Senate Bill 1323 (Menjivar; Stats. 2024, ch. 646) and Senate Bill 1400 (Stern; Stats. 2024, ch. 647) regarding referral of defendants found incompetent to stand trial to CARE Act proceedings, the committee will consider developing a recommendation for Judicial Council–sponsored legislation to revise and clarify the statutory deadlines for hearings in response to those referrals and to provide a pathway for referrals to CARE Act proceedings without a judicial determination that a defendant is ineligible for diversion.</p>	

#	New or One-Time Projects	
	<p>Status/Timeline: If approved by Legislation Committee, anticipated to circulate for comment in spring 2025, be considered by council in late 2025, and, if approved, lead to introduction of legislation that would, if enacted, take effect January 1, 2027.</p> <p>Fiscal Impact/Staff Resources: The proposal would alleviate pressure on trial court fiscal and human resources by extending deadlines to account for events beyond the courts’ control; staff resources include committee staff, CFCC, Criminal Justice Services, Legal Services, Governmental Affairs, Policy and Research, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: Legislation Committee; trial courts, justice system partners, public</p> <p>AC Collaboration: Collaborative Justice Courts Advisory Committee, Criminal Law Advisory Committee</p>	
11.	<p>New project to consider recommending rule amendments or form revisions related to requests for Special Immigrant Juvenile findings in guardianship proceedings</p>	<p>Priority² 1</p> <p>Strategic Plan Goal³ I, IV</p>
	<p>Project Summary: The committee will consider whether rule amendments or form revisions are needed to implement Assembly Bill 2224 (Santiago; Stats. 2024, ch. 955), which (1) amended Code of Civil Procedure section 155 to require a court that grants a person’s request for Special Immigrant Juvenile (SIJ) findings to provide that person with a certified copy of the order granting the request within a specified time if the person has also submitted a request for expedited processing with a properly conformed proposed order; and (2) amended Probate Code section 1510.1 to clarify that a court may, under that section, appoint a parent as guardian of the person of the parent’s 18- to 20-year-old child in connection with a petition for SIJ findings.</p> <p>Status/Timeline: Potential rule amendments or form revisions would take effect no sooner than January 1, 2026.</p> <p>Fiscal Impact/Staff Resources: Staff resources include committee staff, CFCC, Legal Services, Governmental Affairs, and EGG staff.</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: trial courts, public</p> <p>AC Collaboration: Family and Juvenile Law Advisory Committee</p>	

#	Ongoing Projects and Activities	
1.	Review pending legislation	Priority² 1
		Strategic Plan Goal³ IV
<p>Project Summary: The Legislation Subcommittee reviews pending legislation affecting judicial administration, practice, or procedure in proceedings under the Probate Code, the Lanterman-Petris-Short Act, the CARE Act, and other statutes protecting persons with mental health disorders or developmental disabilities; provides technical assistance to Governmental Affairs office, legislative staff, sponsors, and stakeholders, as appropriate; and recommends positions to the council’s Legislation Committee, as required by rule 10.34(a)(3).</p> <p>Status/Timeline: Ongoing</p> <p>Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, Center for Families, Children & the Courts staff</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Internal/External Stakeholders: TBD, depending on subject matter and scope of legislation.</p> <p>AC Collaboration: TBD, depending on subject matter and scope of legislation. In the past, the committee has collaborated with the Civil and Small Claims Advisory Committee, the Collaborative Justice Courts Advisory Committee, the Criminal Law Advisory Committee, the Family and Juvenile Law Advisory Committee, and the Tribal Court–State Court Forum.</p>		
2.	Review enacted legislation	Priority² 1
		Strategic Plan Goal³ IV
<p>Project Summary: Review all enacted legislation referred to the committee by the Judicial Council’s Governmental Affairs staff to determine whether it raises issues within the advisory committee’s purview and, when appropriate, develop recommendations for amendment to the rules of court or revisions to Judicial Council forms to implement the legislation or to bring rules and forms into conformity with it.</p> <p>Status/Timeline: Ongoing</p> <p>Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, Center for Families, Children & the Courts staff</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p>		

#	Ongoing Projects and Activities	
	<p>Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment.</p> <p>AC Collaboration: TBD, depending on subject matter and scope of legislation.</p>	
3.	<p>Promote gender neutrality in rules and forms</p>	<p>Priority² 1</p> <p>Strategic Plan Goal³ IV</p>
	<p>Project Summary: As rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gendered terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity.</p> <p>Status/Timeline: Ongoing</p> <p>Fiscal Impact/Staff Resources: Legal Services staff</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment.</p> <p>AC Collaboration: TBD</p>	
4.	<p>Review suggestions</p>	<p>Priority² 1</p> <p>Strategic Plan Goal³ IV</p>
	<p>Project Summary: As mandated by rule 10.21(c), review suggestions referred by the Chief Counsel from members of the judicial branch and the public for improving judicial administration, practice, and procedure in decedents’ estate, trust, guardianship, conservatorship, and other proceedings under the Probate Code, as well as civil mental health proceedings under the Lanterman-Petris-Short Act and the CARE Act, and recommend action by the council or one of its committees.</p> <p>Status/Timeline: Ongoing</p> <p>Fiscal Impact/Staff Resources: Indeterminate fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, Governmental Affairs, Legal Services, CFCC, and other staff TBD</p>	

#	Ongoing Projects and Activities	
	<p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: TBD, depending on subject matter and scope of suggestion.</p> <p>AC Collaboration: TBD, depending on subject matter and scope of suggestion.</p>	
5.	Monitor developments in California guardianship law related to immigrant children	Priority² 1 Strategic Plan Goal³ IV
	<p>Project Summary: Continue to monitor the implementation, in probate guardianship proceedings, of section 155 of the Code of Civil Procedure (added by Stats. 2014, ch. 685, § 1), section 1510.1 of the Probate Code (added by Stats. 2015, ch. 694), and other statutes concerning state judicial findings to support (proposed) wards’ federal petitions for Special Immigrant Juvenile classification. If necessary, recommend amended rules of court or revised forms.</p> <p>Status/Timeline: Ongoing. Any proposal for new or amended rules of court or new or revised forms would circulate for public comment.</p> <p>Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs, Legal Services, and CFCC staff</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: TBD</p> <p>AC Collaboration: Family and Juvenile Law Advisory Committee; others TBD</p>	
6.	Provide subject-matter expertise	Priority² 1 Strategic Plan Goal³ IV
	<p>Project Summary: The committee serves as a subject-matter resource for the Judicial Council, its internal committees, other advisory bodies, and Judicial Council staff to support legal work, avoid duplication of efforts, and contribute to the development of recommendations for council action. These efforts may include providing probate and mental health procedural expertise and review to working groups, advisory committees, subcommittees, and Judicial Council staff, as needed.</p> <p>Status/Timeline: Ongoing</p>	

#	Ongoing Projects and Activities
	<p><i>Fiscal Impact/Staff Resources:</i> Governmental Affairs, Legal Services, and CFCC staff</p> <p><input type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><i>Internal/External Stakeholders:</i> TBD, depending on subject matter and scope of the issues raised.</p> <p><i>AC Collaboration:</i> TBD, depending on subject matter and scope of the issues raised.</p>

III. LIST OF 2023–2024 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Recommended new and amended rules and new and revised forms to implement the Community Assistance Recovery, and Empowerment (CARE) Act, as amended by Senate Bill 35 (Stats. 2023, ch. 283), effective September 1, 2024.
2.	Recommended forms for use by a conservator of the person to prepare and file a conservatorship care plan as required by Senate Bill 280 (Stats. 2023, ch. 705), effective January 1, 2025.
3.	Recommended new and revised conservatorship forms for confidential declarations regarding a (proposed) conservatee’s legal capacity and medical ability to attend a hearing, effective January 1, 2025.
4.	Recommended amendments to rule 7.1016, effective January 1, 2025, to implement legislation enacted to protect the interests of children who participate in court in child custody proceedings, including probate guardianships.
5.	Provided technical assistance and subject-matter expertise on proposals to adopt and revise forms used to register and seek enforcement of tribal and out-of-state child custody determinations, including those made in probate guardianship proceedings, effective January 1, 2025.