Civil and Small Claims Advisory Committee
Annual Agenda—2026–2027
Approved by Rules Committee: October 22, 2026

I. COMMITTEE INFORMATION

Chair: Hon. Samantha P. Jessner, Superior Court of Los Angeles County (Chair); Hon. David A. Foster, Superior Court of Merced County (Vice-Chair)
Lead Staff: Jenny Grantz, Attorney, Legal Services

Advisory Body's Charge/Membership:

Rule 10.41 of the California Rules of Court states the charge of the Civil and Small Claims Advisory Committee (CSCAC), which is to make recommendations to the Judicial Council for improving the administration of justice in civil and small claims proceedings.

Rule 10.41 also sets forth the membership categories for the committee, which currently has 26 voting members and 1 advisory member. The current committee roster is available on the committee's webpage.

Subgroups of the Advisory Body:

1. Case Administration and Resolution Subcommittee
2. Case Management and Environmental Law Subcommittee
3. Forms Subcommittee
4. Legislative Subcommittee
5. Protective Orders Subcommittee

Advisory Body and Subgroup Meetings Planned for 2026–2027:

Full committee meetings:

- October 2026 (videoconference to review the annual agenda and approve the invitations to comment on Winter Cycle proposals)
- January 2027 (videoconference to review the public comments and make final recommendations on Winter Cycle proposals)
- February 2027 (in-person meeting in San Francisco to approve the invitations to comment on Spring Cycle proposals)
- July 2027 (videoconference to review the public comments and make final recommendations on Spring cycle proposals)
- Other meetings as needed to address proposals implementing new legislation and other urgent matters.

Subcommittee meetings:

- Legislative Subcommittee: Videoconference meetings several times a month as needed from February through August 2027 to review proposed legislation.
- Other subcommittees: One or more videoconference meetings of each subcommittee before each of the full committee meetings.
- Other meetings as needed to address proposals implementing new legislation and other urgent matters.

☐ Check here if more than one in-person meeting is approved by the internal committee oversight chair.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key

Priority Levels for Non-Rules/Forms
1 – Must be done
2 – Should be done

Priority Levels for Rules/Forms Proposals
1a (Legal Compliance) – Proposal urgently needed to conform to or accurately reflect the law.

1b (Council Directive) – Council has directed the committee to consider new or amended rules and forms.

1c (Urgent Remedial Action) – Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.

1d (Financial/ Legal Risk Mitigation) – Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.

2a (Useful Changes in Law) – Useful, but not necessary, to implement changes in law.

2b (Responsive to Concerns) – Responsive to identified concerns or problems.

2c (Helpful Advancing Branch Goals) – Helpful in otherwise advancing Judicial Council goals and objectives

Judicial Branch Strategic Plan–Branch Goals

I. Access, Fairness, Diversity, and Inclusion
II. Independence and Accountability
III. Modernization of Management and Administration
IV. Quality of Justice and Service to the Public
V. Education for Branchwide Professional Excellence
VI. Branchwide Infrastructure for Service Excellence
VII. Adequate, Stable, and Predictable Funding for a Fully Functioning Branch

New or One-Time Projects

1. ***Project Title*: Amend CEQA Rules to Implement New Laws (new project)**

   Priority: 1a

   Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

   Project Summary: Develop rule recommendations as appropriate. This is a joint project with the Appellate Advisory Committee. AB 2152 (Stats. 2026, ch. 767), AB 2231 (Stats. 2026, ch. 926), SB 328 (Stats. 2026, ch. 785), and SB 1370 (Stats. 2026, ch. 777) add additional project types to the list of projects eligible for judicial streamlining. Two of the bills require the Judicial Council to implement necessary rule amendments by July 1, 2027. Additionally, if Proposition 45 is passed by the voters in November, rule amendments may be needed to implement the portions of the proposition that make additional projects eligible for judicial streamlining. As part of this project, the committee will consider whether the CEQA rules can be changed to reduce the number and extent of amendments required to implement new CEQA legislation.

   Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2027

   Fiscal Impact/Staff Resources: Committee staff, Legal Services

   ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

   Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

   AC Collaboration: Appellate Advisory Committee

2. ***Project Title*: Update Pleading Rules and Forms (new project)**

   Priority: 1a

   Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐

Project Summary: Develop rule and form recommendations as appropriate. SB 932 (Stats. 2026, ch. 990) requires an assignee who has been assigned rights in any civil proceeding to identify the original real party in interest in the title of the case on the first document the assignee files in the proceeding. SB 932 will likely require rule amendments and form revisions and may require creation of a new form. As part of this project, the committee will continue developing the amendments to rule 2.111 that it initially proposed during the 2026 Spring Cycle. The committee will consider amending the rule to require all amended and subsequent complaints and cross-complaints to include a list of all parties added and removed by the complaint. The committee will also consider whether those amendments would require revisions to pleading (PLD) forms or development of a new pleading attachment form. Finally, the committee will consider whether to revise form PLD-C-010 to allow an original creditor in a limited civil case to use the form to make a general denial of a verified complaint.

Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2027

Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: Family and Juvenile Law Advisory Committee, Probate and Mental Health Advisory Committee

3. ***Project Title*: Electronic Filing: Amend Rule 2.253 (new project)**

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐

Project Summary: Develop recommendations as appropriate. On August 24, 2026, the Fifth District Court of Appeal ruled in *Gharraee v. Trader Joe's Co.* (2026) 122 Cal.App.5th 786 that California Rules of Court, rule 2.253 preempts any local rule that exempts certain filings within a case type from mandatory e-filing. The committee will consider whether to amend the rule to reflect the current practices of many superior courts, which require electronic filing in civil cases except for particular documents or categories of documents.

Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2027

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

4. ***Project Title*: Implementation of SB 1192 (Reclaim Act) (new project)**

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

Project Summary: Develop rule and form recommendations as appropriate to implement SB 1192 (Stats. 2026, ch. 847), which creates a process for victims of domestic violence who are parties to a civil action to request a prefiling order protecting them from abusive litigation. The bill also establishes a process by which a party subject to a prefiling order may apply to have the order vacated. SB 1192 requires the Judicial Council to create or revise applicable rules and forms by January 1, 2028.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: Family and Juvenile Law Advisory Committee

5. ***Project Title*: Protective Order Forms: Implementation of AB 1961 and AB 2179 (new project)**

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

Project Summary: Develop form recommendations as appropriate to implement AB 1961 (Stats. 2026, ch. 910) and AB 2179 (Stats. 2026, ch. 839), which amend the statute governing workplace violence protective orders to allow employers to seek a protective order on behalf of all employees at a particular workplace or location; require courts to accept electronic filing of petitions and related filings; and permit remote appearances by parties and witnesses.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

6. ***Project Title*: Protective Order Forms: Implementation of SB 1374 (new project)**

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

Project Summary: Develop form recommendations as appropriate to implement SB 1374 (Stats. 2026, ch. 705), which allows a postsecondary school to seek a protective order on behalf of the institution as a whole and any property or facility owned by the school.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

7. ***Project Title*: Protective Order Forms: Implementation of AB 1753 (new project)**

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

Project Summary: Develop form recommendations as appropriate to implement AB 1753 (Stats. 2026, ch. 458), which changes notice requirements for civil harassment, elder and dependent adult abuse, gun violence, postsecondary school violence, and workplace violence protective orders; permits remote appearances at hearings on postsecondary school violence and workplace violence protective orders; and clarifies ammunition relinquishment requirements for protective orders.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: Family and Juvenile Law Advisory Committee, Tribal Court–State Court Forum

8. ***Project Title*: Unlawful Detainer: New and Revised Forms (new project)**

Priority: 2a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop form recommendations as appropriate. The committee will consider whether to revoke form UD-120 to reflect the sunset of Health and Safety Code section 50897.3(e)(2). As part of this proposal, the committee will also consider whether to implement recent suggestions made by committee members and members of the public to improve the forms available in unlawful detainer proceedings. The issues considered by the committee will include creation of forms for (1) making an ex parte request for stay of execution of judgment in an unlawful detainer case, and (2) applying for an order to serve an unlawful detainer summons by posting under Code of Civil Procedure section 415.45.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

9. ***Project Title*: Improvements to Various Civil Forms (new project)**

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop form recommendations as appropriate. The committee will consider whether to revise forms ADR-106, CM-015, DISC-001, MC-012, NC-130, SC-103, and SC-145 to address issues raised by committee members, Judicial Council staff, and members of the public over the past year. The revisions would correct misstatements of law, clarify instructions, remove unnecessary requests for personal identifying information, and make other changes to address concrete problems meriting near-term action. The committee will address these issues in a single proposal to maximize resources.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

10. *Project Title*: Notice of Entry of Judgment After Small Claims Appeal (new project)

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop form recommendations as appropriate. The committee will consider whether to create a form to reflect a judgment following a de novo hearing in a small claims case. Existing form SC-130 has items that can be used for this purpose, but the form contains inapplicable language about the defendant's right to appeal that does not apply after the de novo hearing occurs. This project is the result of a suggestion from a judicial officer experienced with small claims proceedings.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

11. *Project Title*: Proof of Service of Summons: Declaration of Mailing (new project)

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop form recommendations as appropriate. The committee will consider whether to create a declaration of mailing form that could be attached to proof of service forms, including form POS-010 (*Proof of Service of Summons*) and POS-060 (*Proof of Alternative Service—Restraining Orde*r). This project is the result of suggestions made by several commenters on the committee's recent proposal to revise proofs of service and related forms.

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

12. *Project Title*: Revise Civil Summons Forms (previously approved one-time project)

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop form recommendations as appropriate to update the list of code sections in the "Notice to the Person Served" on the general summons form (SUM-100) and other forms containing a similar item. The list currently omits several frequently used sections, such as those for "business organization, form unknown" and "public entity."

Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2028

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: N/A

Ongoing Projects and Activities

1. ***Project Title*: Review Suggestions for Rules and Forms**

   Priority: 1

   Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

   Project Summary: As mandated by rule 10.21(c), review suggestions from members of the judicial branch and the public for improving civil practice and procedure, court-connected ADR, and case management and recommend actions by the council or one of its committees.

   Status/Timeline: Ongoing; will only take further action upon approval of Rules Committee.

   Fiscal Impact/Staff Resources: Committee staff

   ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

   Internal/External Stakeholders: N/A

   AC Collaboration: As appropriate based on proposal received.

2. ***Project Title*: Review Enacted Legislation**

   Priority: 1

   Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☒	☒	☐	☐	☐	☐

   Project Summary: Review enacted legislation that may have an impact on issues within the advisory committee's purview and, where appropriate, propose to the council rules and forms to implement the legislation or to bring rules and forms into conformity with it.

Status/Timeline: Ongoing; will only take further action upon approval of Rules Committee.

Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: N/A

AC Collaboration: As appropriate based on specific legislation.

3. ***Project Title*: Review Pending Legislation**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☒	☐	☐	☐

Project Summary: Working through the Legislative Subcommittee, review pending legislation affecting civil and small claims proceedings and court administration, then make recommendations to the Legislation Committee as to whether the Judicial Council should support or oppose the legislation.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: California Legislature

AC Collaboration: N/A

4. ***Project Title*: Miscellaneous Technical Changes**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria of rule 10.22(d)(2): "a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy." These changes include revisions to forms that contain dollar figures based on statutory criteria that the Judicial Council is mandated to adjust on a regular basis.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: N/A

AC Collaboration: N/A

5. ***Project Title*: Protective Orders**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☐	☐	☐	☐

Project Summary: Work with other advisory groups as appropriate to ensure protective order forms are written in consistent language that is comprehensible to non-attorneys, while maintaining legal accuracy.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff; Center for Families, Children & the Courts; Criminal Justice Services

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: N/A

AC Collaboration: Criminal Law Advisory Committee, Family and Juvenile Law Advisory Committee

6. ***Project Title*: Deskbook on the Management of Complex Civil Litigation**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☐	☐	☐	☐

Project Summary: Ongoing responsibility for updating the *Deskbook on the Management of Complex Civil Litigation* as charged to the committee by the council at its October 22, 1999.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, Center for Judicial Education and Resources

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: N/A

AC Collaboration: N/A

7. ***Project Title*: Provide Subject Matter Expertise**

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☐	☐	☐	☐

Project Summary: Serve as a subject matter resource for other advisory bodies to avoid duplication of efforts and contribute to the development of recommendations for council action. Such efforts may include providing civil and small claims procedural expertise and review to working groups, advisory committees, and subcommittees as requested on projects that have been approved on their annual agendas.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: N/A

AC Collaboration: As appropriate based on the advice or consultation requested.

8. ***Project Title*: Update Judicial Council form content to enhance accessibility**

Priority: 2a

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☒	☒	☐	☐	☐

Project Summary: As forms are developed or updated, the committee will continue to enhance accessibility features. Updates may include reordering or rephrasing items to improve useability and revising forms to clarify instructions, headings, or form field descriptions (i.e., labels).

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: As appropriate based on the affected forms.

9. *Project Title*: Revision of Judicial Council Forms with a Gender Identity Question or Term

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☒	☐	☐	☐

Project Summary: The forms within this committee's purview that include a gendered term or gender identity question are being revised to eliminate or revise those terms where possible.

Status/Timeline: The vast majority of forms have been updated to eliminate such terms. Any time a form is revised for legislatively mandated reasons or other reasons approved by the Rules Committee, gendered terms and gender identity questions are reviewed and revised as appropriate.

Fiscal Impact/Staff Resources: Committee staff

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment.

AC Collaboration: As appropriate based on the affected forms.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. *Civil Case Cover Sheet:* The committee recommended revising form CM-010 (Civil Case Cover Sheet) to add a checkbox for cases filed under the Song-Beverly Act, enabling courts and the branch to more effectively develop data regarding these cases and their resource requirements. This project was completed during the 2026 Winter rules cycle.
2. *Enforcement of Judgment Forms:* The committee recommended form revisions to implement AB 774, which made several changes to the laws relating to enforcement of judgment, including the calculation of the start of the earnings withholding period and the procedure for verifying the judgment debtor's address in personal debt cases. AB 774 also created new procedures for reinstating a judgment lien. This project was completed during the 2026 Winter rules cycle.
3. *Name and Gender Change Forms:* The committee recommended creating several new forms and revising numerous forms to implement AB 1084 and SB 59. AB 1084 changed the procedures for obtaining a court order changing an individual's name to conform to their gender identity. SB 59 requires courts to limit access to court records in proceedings to change the petitioner's gender and sex identifier, change the petitioner's name and recognize their gender and sex identifier, or conform an individual's name to their gender identity. This project was completed during the 2026 Winter rules cycle.
4. *CEQA Rules:* The committee recommended rule amendments to implement a new law requiring expedited CEQA review for certain projects. This project was completed during the 2026 Spring rules cycle.
5. *Fee Waiver Forms:* The committee recommended revisions to numerous fee waiver forms to implement a new law, correct misapplications of existing law, and make other improvements. This project was completed during the 2026 Spring rules cycle.
6. *Mandatory Settlement Conferences:* The committee recommended amendments to California Rules of Court, rule 3.1380 to permit remote appearances at settlement conferences consistent with Code of Civil Procedure section 367.75 and rule 3.672. This project was completed during the 2026 Spring rules cycle.
7. *Mediation Rules:* The committee recommended rule amendments to implement AB 1523, which changed the conditions under which a court can order a case into mediation, including by raising the maximum amount in controversy from $50,000 to $75,000. This project was completed during the 2026 Spring rules cycle.
8. *Military Forms:* The committee recommended revising several forms to ensure they accurately reflect the requirements of Military and Veterans Code section 409.3, which allows those in active-duty military service to ask a court to temporarily relieve them from financial obligations if their active duty materially affects their ability to pay such obligations. This project was completed during the 2026 Spring rules cycle.
9. *Proofs of Service:* The committee recommended creating several forms and revising numerous forms to implement AB 747 and SB 59. AB 747 changed the legal requirements for substituted service of summons, proof of service of summons, service of unlawful detainer summons by posting and mailing, and default judgment. SB 85 amended Code of Civil Procedure section 413.30 to allow a plaintiff to ask

the court to permit service of the summons by a different method, including email or other electronic technology. This project was completed during the 2026 Spring rules cycle.

10. *Protective Order Forms:* The committee recommended revising numerous protective order forms to implement AB 561 and AB 2917, which changed the laws regarding civil harassment, elder and dependent adult abuse, and gun violence prevention protective orders. This project was completed during the 2026 Spring rules cycle.
11. *Statements of Decision:* The committee recommended rule amendments and the adoption of new forms to implement AB 515, which significantly changed the procedures for requesting and issuing a written statement of decision after the trial of a question of fact by the court. This project was completed during the 2026 Spring rules cycle.
12. *Unlawful Detainer Forms:* The committee recommended revising several unlawful detainer forms to implement AB 246 and AB 863, which made changes to laws regarding summons, complaints, and defenses in unlawful detainer proceedings. The committee also recommended form revisions to correct misstatements of law, remove inapplicable items, improve readability and clarity, make significant plain-language revisions to form UD-100 (*Unlawful Detainer—Complaint*), and convert form UD-105 (*Unlawful Detainer—Answer*) to a plain-language form. This project was completed during the 2026 Spring rules cycle.
13. *Review of Pending Legislation:* The committee reviewed and made recommendations regarding council position on numerous bills with potential impacts on civil and small claims proceedings.