



# JUDICIAL COUNCIL OF CALIFORNIA

PROBATE AND MENTAL HEALTH  
ADVISORY COMMITTEE

[www.courts.ca.gov/pmhac.htm](http://www.courts.ca.gov/pmhac.htm)  
[pmhac@jud.ca.gov](mailto:pmhac@jud.ca.gov)

## PROBATE AND MENTAL HEALTH ADVISORY COMMITTEE

### MEETING WITH CLOSED AND OPEN SESSIONS AGENDA

OPEN PORTION OF THIS MEETING IS BEING RECORDED

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**Date:** November 14, 2014  
**Time:** 9:30 a.m.—4:30 p.m. (The open portion of the meeting will begin at 1:00 p.m.)  
**Location:** Malcolm M. Lucas Judicial Council Board Room  
Judicial Council Conference Center  
3rd Floor, State Building  
455 Golden Gate Avenue  
San Francisco, California 94102-3688  
**Public Call-in Number:** 1-877-820-7831, Passcode 4264624

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Meeting materials for the open portion of the meeting will be posted on the advisory body web page on the California Courts website at least three business days before the meeting.

Agenda items are numbered for identification purposes only and will not necessarily be considered in the indicated order.

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#### **I. CLOSED SESSION (CAL. RULES OF COURT, RULE 10.75(C)(3))**

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The following items will be considered, discussed, and, if action items, acted upon, in closed session under California Rule of Court, rule 10.75(c)(3) and 10.75(d). As specified in rule 10.75(c)(3)(E), the Probate and Mental Health Advisory Committee is a “rule committee” and none of the items listed in this closed session are budget items, within the meaning of rule 10.75(c)(1). The Chair has not concluded that any of these items may be addressed in open session.

##### **Item 1 Call to Order, Roll Call, and Roster**

Introduction of the new committee Chair, Hon. John H. Sugiyama and new committee member, Ms. Sandra G. Lucas; and reintroduction of returning members, Hon. Maria E. Stratton, Mr. James R. Birnberg, Ms. Jayne C. S. Lee, and Ms. Stella Pantazis, reappointed for new membership terms.

Review revised committee roster for accuracy and advise of any changes required.

##### **Item 2 Subcommittee Roster**

Review revised subcommittee roster and advise of any changes required.

**Item 3 Approval of Minutes**

Approve minutes of the July 11, 2014 Probate and Mental Health Advisory Committee meeting. (Action Required)

**Item 4 2015 Committee Annual Agenda**

Review of 2014 Annual Agenda and discussion of possible new agenda items for 2015 Annual Agenda and schedule for completion of 2015 Agenda.

**Item 5 Legislation Report (Information)**

**Item 6 Report on decision of the Chair of the Statement of Decision Working Group (Information).**

**Item 7 Proposal for revision and adoption of California Rules of Court (CRC) governing court fee waivers and adoption of Judicial Council forms for applications for court fee waivers in favor of wards and conservatees, effective July 1, 2015 (Action Required).**

Proposal for revision of CRC, rules 3.50–3.53 and adoption of CRC, rule 7.5; and adoption of *Request to Waive Court Fees (Ward or Conservatee)* (form FW-001-GC), *Request to Waive Additional Court Fees (Superior Court)(Ward or Conservatee)* (Form FW-002-GC), *Order on Court Fee Waiver (Superior Court)(Ward or Conservatee)* (form FW-003-GC), *Notice: Waiver of Court Fees (Superior Court)(Ward or Conservatee)* (form FW-005-GC), *Request for Hearing About Court Fee Waiver Order (Superior Court)(Ward or Conservatee)* (form FW-006-GC), *Notice on Hearing About Court Fees (Ward or Conservatee)* (formFW-007-GC), *Order on Court Fee Waiver After Hearing (Superior Court)(Ward or Conservatee)* (form FW-008-GC), *Notice to Court of Improved Financial Situation or Settlement (Ward or Conservatee)* (form FW-010-GC), *Notice to Appear for Reconsideration of Fee Waiver (Ward or Conservatee)* (form FW-011-GC), and *Order on Court Fee Waiver After Reconsideration Hearing (Superior Court)(Ward or Conservatee)* (form FW-012-GC), effective July 1, 2015.

**Item 8 Proposal for adoption of California Rule of Court, adoption of new Judicial Council form, and revision of existing form concerning Special Immigrant Juvenile Status in probate guardianships, effective January 1, 2016. (Action Required)**

Proposal for adoption of CRC, rule 7.1020 and *Petition for Order Regarding Eligibility for Special Immigrant Juvenile Status—Probate Guardianship* (form GC-220); and revise *Order Regarding Eligibility for Special Immigrant Juvenile Status—Probate Guardianship* (form GC-224).

**Item 9 Proposal for adoption and revision of Judicial Council forms required by California Conservatorship Jurisdiction Act, effective January 1, 2016. (Action Required)**

Proposal for adoption of *Conservatorship Registration Cover Sheet and Attestation of Conservatee's Non-Residence in California* (form GC-360), *Notice of Intent to Register*

*Conservatorship* (form GC-361), and *Conservatorship Registrant's Acknowledgment of Receipt of Handbook for Conservators* (form GC-362); revise *Petition for Appointment of Conservator* (form GC-310).

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**II. OPEN SESSION (CAL. RULES OF COURT, RULE 10.75(C)(1) AND (3))**

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**The Chair has concluded that the following item may be addressed in open session.**

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**PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K)(2))**

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**Public Comment**

Members of the public (other than the presenters identified below) requesting to speak during the public comment portion of the meeting must place the speaker's name, the name of the organization that the speaker represents if any, and the agenda item that the public comment will address, on the public comment sign-up sheet. The sign-up sheet will be available at the meeting location at least one hour prior to the start time of the public portion of the meeting. The Chair will establish speaking limits at the beginning of the public comment session. While the advisory body welcomes and encourages public comment, time may not permit all persons requesting to speak to be heard at this meeting.

**Written Comment**

In accordance with California Rules of Court, rule 10.75(k)(1), written comments pertaining to any agenda item of a regularly noticed open meeting can be submitted up to one complete business day before the meeting. For this specific meeting, comments should be e-mailed to [pmhac@jud.ca.gov](mailto:pmhac@jud.ca.gov) or mailed or delivered to Judicial Council of California, 2255 North Ontario Street, Suite 220, Burbank, CA 91504-3188, attention: Douglas C. Miller. Only written comments received by 3:00 p.m., Thursday, November 13, 2014 will be provided to advisory body members prior to the start of the meeting.

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**DISCUSSION AND ACTION ITEM (ITEM 10)**

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**Item 10 Proposal of the Spectrum Institute for a recommendation by this Committee for creation of Limited Conservatorship Task Force (Information and Action Required)**

Request from Disability and Abuse Project, Spectrum Institute, for a recommendation from the committee to the Chief Justice and/or the Judicial Council that a Limited Conservatorship Task Force be created and authorized to study current law and practices in the appointment of limited conservators of developmental disabled persons and court supervision of these limited conservatorships.

Presenters: Mr. Thomas F. Coleman and Nora Baladerian, Ph.D.

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**III. ADJOURNMENT**

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**Adjourn to Closed Session**

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**IV. CLOSED SESSION (CAL. RULES OF COURT, RULE 10.75(C)(3))**

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**Item 11 Travel Expenses**

**Item 12 Plan Next Meeting**

**Adjourn Meeting**