Judicial Council *of* California

RULES COMMITTEE
DRAFT MINUTES OF OPEN VIDEOCONFERENCE MEETING

August 25, 2026

12:10 to 12:40 pm

Members Present: Hon. Tamara L. Wood (Chair), Hon. Michael Rhoads (Vice-Chair), Hon. Bunmi O. Awoniyi, Hon. Ryan Davis, Ms. Rachel W. Hill, Mr. Charles Johnson, Hon. Jeffrey C. Kauffman, Hon. Ricardo R. Ocampo, Mr. Craig M. Peters and Ms. Dena Stone

Rules Committee Staff Present: Kristin Burford, Benita Downs, and Eric Long

Advisory Bodies Staff Present: Jenny Grantz and Kara Portnow

OPEN MEETING

Call to Order and Roll Call
The chair called the meeting to order at 12:11 p.m., and Ms. Downs took roll call.

Approval of Minutes
The committee reviewed and approved minutes of the June 2, 2026, Rules Committee meeting and June 26, 2026, action by email.

DISCUSSION AND ACTION ITEMS (ITEMS 01–03)

CRIMINAL JURY INSTRUCTIONS (CALCRIM)

Item 1

Jury Instructions: Criminal Jury Instructions (2026 Supplement) **(Action required – recommend Judicial Council action)**

The Rules Committee reviewed a proposal from the Advisory Committee on Criminal Jury Instructions recommending Judicial Council approval of new and revised criminal jury instructions prepared by the advisory committee under rule 2.1050 of the California Rules of Court. These changes will keep the instructions current with statutory and case authority. Once approved, the revised instructions will be published in the 2026 supplement of *Judicial Council of California Criminal Jury Instructions* (*CALCRIM*).

Action: The committee unanimously approved the recommendation from the Advisory Committee on Criminal Jury Instructions, which is to go to the Judicial Council for action at the October council meeting.

CIVIL AND SMALL CLAIMS

Item 2/SP26-06

Rules and Forms: Amendment of Rule 2.900 (Action required – recommend circulation for comment)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to amend California Rules of Court, rule 2.900, to implement Assembly Bill 515 (Stats. 2025, ch. 559), which amends the statute governing statements of decision. In a separate proposal, the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee are recommending amendments to rule 3.1590 to implement AB 515, including deletion of the requirement to announce a tentative decision. This proposal would conform rule 2.900 with the recommended amendments to rule 3.1590 by replacing references to tentative decisions with references to statements of decision.

Action: The committee unanimously approved the proposal for circulation on a special cycle through September 23, 2026.

Item 3/SP26-07

Remote Proceedings: Implementation of Senate Bill 174 (Action required – recommend circulation for comment)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to amend six rules and revise one form to implement Senate Bill 174 (Stats. 2026, ch. 29). This bill, effective June 29, 2026, made several amendments to Code of Civil Procedure section 367.75, governing remote appearances in civil proceedings. Those amendments include extending the statute's sunset date and requiring courts that order an in-person appearance to provide a reason for doing so.

Action: The committee unanimously approved the proposal for circulation on a special cycle through September 23, 2026.

ADJOURNMENT

There being no further business, the meeting was adjourned at 12:26 p.m.

Approved by the advisory body on enter date.

Judicial Council *of* California

RULES COMMITTEE
DRAFT MINUTES OF OPEN VIDEOCONFERENCE MEETING

DAY 1 — September 9, 2026

12:10 to 1:40 pm

Members Present: Hon. Tamara L. Wood (Chair), Hon. Michael Rhoads (Vice-Chair), Hon. Bunmi O. Awoniyi, Hon. Ryan Davis, Mr. Charles Johnson, Hon. Jeffrey C. Kauffman, Hon. Ricardo R. Ocampo and Ms. Dena Stone

Members Absent: Ms. Rachel W. Hill and Mr. Craig M. Peters

Rules Committee Staff Present: Kristin Burford, Benita Downs, and Eric Long

Advisory Bodies Staff Present: Alex Bender, Tony Cheng, Eric Divine, Kerry Doyle, Sarah Fleischer-Ihn, Jenny Grantz, Sarah Jacobvitz, Julia Kaufman, Stephanie Lacambra, Nikki Marquez, Kristen Schmit, Gabrielle Selden, Marymichael Smrdeli, Marina Soto, Corby Sturges, and Jeremy Varon

Other Judicial Council Staff Present: Deanna Adams, James Barolo, Art Dirk, Audrey Fancy, Anne Hadreas, Frances Ho, Maddie Joyner, Eunice Lee, Anna Maves, Lizette Perez, Jamie Schechter and Charina Zalzos

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order at 12:12 p.m., and Ms. Downs took roll call.

DISCUSSION AND ACTION ITEMS (ITEMS 01–31, 40)

Appellate

Item 01/SPR26-01

Appellate Procedure: Required Use of Appendixes in Civil Appeals **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from Appellate Advisory Committee that the Judicial Council, effective January 1, 2027, amend rules 8.40, 8.124, 8.702, 8.713, and 8.845 of the California Rules of Court regarding the record in civil appeals to require parties represented by counsel to use appendixes.

Action: The committee unanimously approved the recommendation from the Appellate Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 02/SPR26-02

Appellate Procedure: Record Designation Rules and Forms **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from the Appellate Advisory Committee to amend rules, revise existing forms, and approve new forms to simplify and improve the clarity of the record-designation process in civil appeals.

Action: The committee unanimously approved the recommendation from the Appellate Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 03/SPR26-03

Appellate Procedure: Record in Felony Appeals **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from the Appellate Advisory Committee that the Judicial Council, effective January 1, 2027, amend rule 8.320 of the California Rules of Court regarding felony appeals to clarify what must be included in the record.

Action: The committee unanimously approved the recommendation from the Appellate Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 04/SPR26-04

Appellate Procedure: Clarify Rule Requiring Notice of Failure to Procure the Record **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from the Appellate Advisory Committee to amend rule 8.140 of the California Rules of Court. Under subdivision (a) of the rule, the superior court must notify a litigant that they have failed to timely do an act required to procure the record for the appeal of a civil case. The proposal recommends adding an advisory committee comment providing examples of acts required to procure the record.

Action: The committee unanimously approved the recommendation from the Appellate Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 05/SPR26-05

Appellate Procedure: Extension-of-Time Order in Limited Civil, Misdemeanor, and Infraction Appeals **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from the Appellate Advisory Committee that the Judicial Council approve a new optional form for issuing an order on an application for an extension of time to file a brief in limited civil, misdemeanor, and infraction appeals.

Action: The committee unanimously approved the recommendation from the Appellate Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 06/SPR26-06 (Joint with the Civil and Small Claims Advisory Committee)

CEQA Actions: Implementation of Senate Bill 676 **(Action required – recommend Judicial Council action)**

The committee reviewed a joint proposal from the Appellate Advisory Committee and the Civil and Small Claims Advisory Committee to amend California Rules of Court governing the expedited resolution of actions and proceedings brought under the California Environmental Quality Act (CEQA) to implement Senate Bill 676 (Stats. 2025, ch. 550). In addition, the proposal recommends rule changes to remove outdated material related to projects formerly eligible for streamlining and to make a minor technical change for consistency within the rules.

Action: The committee unanimously approved the joint recommendation from the Appellate Advisory Committee and the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Civil

Item 07/SPR26-07

Unlawful Detainer: Form Revisions to Implement Assembly Bills 246, 747, and 863 **(Action required – recommend Judicial Council action)**

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to revise four forms in response to Assembly Bills 246 (Stats. 2025, ch. 337), 747 (Stats. 2025, ch. 563), and 863 (Stats. 2025, ch. 344), which amended laws governing summonses, complaints, and defenses in unlawful detainer proceedings. The proposed revisions would implement these statutory changes, correct misstatements of law, remove inapplicable items, and improve readability and clarity. The proposal also includes significant plain-language revisions to *Unlawful Detainer—Complaint* (form UD-100) and the conversion of *Unlawful Detainer—Answer* (form UD-105) to a plain-language format.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 08/SPR26-08

Civil Practice and Procedure: Rules and Forms to Implement Changes in Law Regarding Civil Summons (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to amend four rules, adopt two mandatory forms, approve one optional form, and revise 13 forms in response to Assembly Bill 747 (Stats. 2025, ch. 563) and Senate Bill 85 (Stats. 2025, ch. 403), which made numerous changes to the laws governing service and proof of service of summons in civil actions. The proposed

revisions would implement these statutory changes and improve the clarity and readability of the affected rules and forms.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 09/SPR26-09

Civil Practice and Procedure: Revisions to Military Forms (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to revise three military service forms to reflect amendments to Military and Veterans Code section 409.3, which allows individuals on active military duty to request temporary relief from financial obligations when their military service materially affects their ability to pay. The proposed revisions would implement these statutory changes and improve the clarity and readability of the forms.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 10/SPR26-10 (Joint with the Probate and Mental Health Advisory Committee)

Rules and Forms: Revisions to Fee Waiver Forms (Action required – recommend Judicial Council action)

The committee reviewed a joint proposal from the Civil and Small Claims Advisory Committee and the Probate and Mental Health Advisory Committee to amend seven rules of court and revise 22 fee waiver forms in response to Senate Bill 54 (Stats. 2025, ch. 646), which excludes service-connected veterans disability compensation from monthly income when determining whether a fee waiver applicant's income is 200 percent or less of the current federal poverty guidelines. The proposed revisions would implement these statutory changes, correct misapplications of existing law, and make other improvements to the rules and forms.

Action: The committee unanimously approved the joint recommendation from the Civil and Small Claims Advisory Committee and the Probate and Mental Health Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 11/SPR26-11

Civil Practice and Procedure: Amendment of Court-Ordered Mediation Rule (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to amend California Rules of Court, rules 3.891 and 3.894, in response to Assembly Bill 1523 (Stats. 2025, ch. 201), which changes the laws governing cases that may be ordered into mediation. The proposed

amendments would implement these statutory changes and improve the readability and clarity of the rules.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 12/SPR26-12

Civil Practice and Procedure: Amendment of Mandatory Settlement Conferences Rule (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to amend California Rules of Court, rule 3.1380, to clarify that in-person attendance is not required at mandatory settlement conferences and that courts have discretion to determine how parties must appear.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 13 [Reserved]

Item 14/SPR26-14 (Joint with the Family and Juvenile Law Advisory Committee)

Civil Practice and Procedure: Statement of Decision Rules and Forms to Implement Assembly Bill 515 (Action required – recommend Judicial Council action)

The committee reviewed a joint proposal from the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee to amend two rules of court and approve four Judicial Council forms in response to Assembly Bill 515 (Stats. 2025, ch. 559), which changes the procedures for requesting, preparing, and finalizing statements of decision. The proposed amendments and forms would implement these statutory changes, provide guidance on the requirements for requesting a statement of decision, and establish forms for parties to submit objections as authorized by AB 515.

Action: The committee unanimously approved the joint recommendation from the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Criminal

Item 15/SPR26-15

Criminal Procedure: Revisions to Felony Sentencing Rules (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Criminal Law Advisory Committee to amend two California Rules of Court to reflect recent case law addressing the circumstances under which a trial court may rely

on aggravating factors justify the imposition of an upper term sentence in the context of a felony prosecution. The proposed amendments would clarify the scope of the trial court's discretion when imposing an upper term sentence.

Action: The committee unanimously approved the recommendation from the Criminal Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 16/SPR26-16

Criminal Law: Revisions to the Order for Dismissal for Military Personnel (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Criminal Law Advisory Committee to revise *Order for Dismissal (Military Personnel)* (form CR-184/MIL-184) in response to a suggestion from the California Department of Justice to remove an item related to notifying the department of a record sealing order under Penal Code section 1170.9(h)(4)(D). The proposed revisions would also remove an item for the defendant's date of birth, make technical amendments to improve readability, and replace gendered pronouns.

Action: The committee unanimously approved the recommendation from the Criminal Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 40/SP26-03 (Out of order)

Criminal Law: Pretrial Release or Detention (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Criminal Law Advisory Committee to revise *Findings and Orders for Pretrial Release or Detention* (form CR-104) in response to the California Supreme Court's decision in *In re Kowalczyk* (2026) 19 Cal.5th 593, which provided guidance regarding the constitutional parameters for pretrial release or detention. The proposed revisions would assist courts with making appropriate findings and orders for pretrial release or detention consistent with the decision and statutory and constitutional requirements.

Action: The committee unanimously approved the recommendation from the Criminal Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Family and Juvenile

Item 17/SPR26-17

Family Law: Financial Disclosure Forms (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to revise three family law forms, adopt four mandatory attachment forms, approve two optional attachment forms,

and revoke an optional information sheet in response to recent federal legislation (H.R. No. 1, 119th Cong., 1st Sess. (2025)), which modified the tax treatment of certain income attributable to tips and overtime for tax years 2025–2028. The proposed revisions would implement House Resolution No. 1, address concerns identified during prior rule cycles and the public comment process, and facilitate more comprehensive and accurate financial disclosure.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 18/SPR26-18

Family Law: Adoption Order (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to revise *Adoption Order* (form ADOPT-215), the mandatory Judicial Council form used for all orders for the adoption of a minor child, in response to Senate Bill 450 (Stats. 2025, ch. 757), which amended California adoption law to require adoption orders to identify all legal parents following an adoption, including adoptive parents and any existing parents maintaining parental rights. The proposed revisions would implement these statutory changes.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 19/SPR26-19

Family Law: Revise Summons Forms to Implement Assembly Bill 1297 and Enhance Consistency (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to revise four family law summons forms, effective January 1, 2027. The proposed revisions would implement Assembly Bill 1297 (Stats. 2025, ch. 48), which amends Family Code section 2040 regarding automatic temporary restraining orders applicable in dissolution, nullity, and legal separation proceedings. The bill expands the automatic temporary restraining order related to insurance to prohibit parties from allowing an insurance plan to lapse for nonpayment of premiums or failing to renew insurance. The proposed revisions would also use plain language, make technical changes, and restructure and reorganize all four summons forms to promote accessibility and consistency across the summons forms used in family law proceedings.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 20/SPR26-20

Family Law: Domestic Violence Training Standards for Court-Appointed Child Custody Investigators and Evaluators (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend California Rules of Court, rules 5.215 and 5.230, in response to Assembly Bill 1974 (Stats. 2024, ch. 303), which amended Family Code section 1816 by expanding the advanced training requirements for court-appointed child custody investigators and evaluators. The proposed amendments would reference Family Code section 1816 directly rather than duplicating the statute's list of required training topics to ensure that court professionals are directed to the current training requirements and reduce the need for future conforming amendments. The proposal recommends additional substantive and technical amendments to improve legal accuracy and readability.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 21/SPR26-21

Family Law: Rules and Forms to Implement Assembly Bill 747 and Senate Bill 85 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend one rule of court, adopt one mandatory form, approve two optional forms, and revise eight forms in response to Assembly Bill 747 (Stats. 2025, ch. 563) and Senate Bill 85 (Stats. 2025, ch. 403), which change California law governing service of a summons in civil cases, including substituted service, proof of service, and court-ordered alternative service. The proposed changes would implement these statutory changes and update Judicial Council rules and forms used in family law proceedings and proceedings under the Domestic Violence Prevention Act for consistency with the law governing service, as amended by AB 747 and SB 85.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 22/SPR26-22

Family Law: Certification, Review, and Use of Computer Software to Assist in Determining Support (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend the rule that provides standards for computer software that assists in determining child and spousal support. The proposed amendments would ensure the availability and accuracy of support calculator software used by the public and courts, ensure all certified support calculators continue to perform in a manner consistent with the Family Code and rules of court, promote transparency in the certification and

recertification procedures, and update terminology. The proposal also includes minor technical and grammatical changes to the rule to improve readability.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 23 [Reserved]

Item 24/SPR26-24

Juvenile Law: Record Sealing Forms (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend three court rules, approve two new forms, and revise four existing forms to implement Assembly Bill 1877 (Stats. 2024, ch. 811), which enacted Welfare and Institutions Code section 788, a juvenile record sealing statute. Under the statute, county probation officers are required to initiate a record sealing process for individuals 18 years of age or older upon the termination of juvenile court delinquency jurisdiction.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 25/SPR26-25

Juvenile Law: Transfer of Nonminor Dependents (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend one rule, adopt one form, and revise two forms to comply with new requirements for granting a nonminor dependent's request to change residence to another county under Assembly Bill 890 (Stats. 2025, ch. 281).

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 26/SPR26-26

Juvenile Law: Probation Time Limits (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to revise three forms to comply with new requirements for time limits on juvenile probation under Assembly Bill 1376 (Stats. 2025, ch. 575).

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 27/SPR26-27

Juvenile Law: Implementation of AB 383 Regarding Firearms Relinquishment (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee, with approval from the Criminal Law Advisory Committee, to revise form CR-210 *(Prohibited Persons Relinquishment Form Findings)* into a joint criminal and juvenile form to implement Assembly Bill 383 (Stats. 2025, ch. 362), which amended Penal Code section 29810 to extend existing firearms relinquishment procedures to minors adjudicated for various offenses. The proposed revision would reflect that the findings required under Penal Code section 29810 are now the same in criminal cases and juvenile cases.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 28/SPR26-28

Juvenile Dependency: Guidelines for Counsel Collections Program (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend California Rules of Court, Appendix F (Guidelines for the Juvenile Dependency Counsel Collections Program), to remove references to a superseded method of calculating the court cost of providing dependency-related legal services. The proposal would also reformat the appendix to conform more closely to the style of the rules of court and make additional technical and stylistic changes.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 29/SPR26-29

Juvenile Law: Incarcerated Parents and Nonminor Dependents (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend two rules of court and revise two mandatory forms to implement Assembly Bill 651 (Stats. 2025, ch. 274), which amended Penal Code section 2625 to require courts to include wards in secure youth treatment facilities when sending notice to incarcerated parents and allowing them to attend specified dependency hearings. If an incarcerated parent waives in-person attendance, the statute requires incarcerated parents to be given the opportunity to participate in the hearing by videoconference or, if unavailable, by

teleconference. The bill also amended Welfare and Institutions Code section 349 to extend to nonminor dependents the rights to notice, participation, and continuances if notice is not provided.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 30/SPR26-30

Juvenile Law: Updating Access Rules for Juvenile Case Files Under Senate Bill 413 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend the California Rules of Court and to adopt and approve new forms to implement Senate Bill 413 (Stats. 2025, ch. 221). The legislation authorizes a new category of individuals—attorneys representing a party in certain civil proceedings involving child welfare agencies or probation departments—to access juvenile case files under specified confidentiality safeguards. (See Welf. & Inst. Code, § 827.)

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 31/SPR26-31

Juvenile Law: Physical Transfer of a Party in Custody (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to amend California Rules of Court, rule 5.770, revise *Order to Transfer Juvenile to Criminal Court* (form JV-710), and approve new form, *Order Regarding Housing in Adult Facility* (form JV-711) to align them with statutory requirements and ensure statewide consistency. Senate Bill 823 (Stats. 2020, ch. 337) established a new statutory process governing when and how a party whose juvenile case has been transferred to criminal court may be physically transferred from a juvenile facility to an adult facility. The Court of Appeal decision in *Gabriel M. v. Superior Court* (2024) 107 Cal.App.5th 446 highlighted conflicts between Welfare and Institutions Code section 208.5 and the rule and form implementing that statute.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

ADJOURNMENT

Meeting adjourned at 1:37 p.m. and resumed the next day, September 10, at 12:10 p.m.

Approved by the advisory body on enter date.

Judicial Council *of* California

RULES COMMITTEE
DRAFT MINUTES OF OPEN VIDEOCONFERENCE MEETING

DAY 2 — September 10, 2026

12:10 to 1:40 pm

Members Present: Hon. Tamara L. Wood (Chair), Hon. Michael Rhoads (Vice-Chair), Hon. Bunmi O. Awoniyi, Hon. Ryan Davis, Mr. Charles Johnson, Hon. Jeffrey C. Kauffman, Hon. Ricardo R. Ocampo and Ms. Dena Stone

Members Absent: Ms. Rachel W. Hill and Mr. Craig M. Peters

Rules Committee Staff Present: Kristin Burford, Benita Downs, and Eric Long

Advisory Bodies Staff Present: Maddie Joyner, Julia Kaufman, Jamie Schechter, Kristen Schmit, and Corby Sturges

Other Judicial Council Staff Present: James Barolo, Audrey Fancy, Jenny Grantz, Anne Hadreas, Frances Ho, Sarah Jacobvitz, Eunice Lee, Nikki Marquez, Anna Maves, Gabrielle Selden, and Charina Zalzos

OPEN MEETING

DAY 2 — Thursday, September 10, 2026

Reconvene, Call to Order and Roll Call

The chair called the meeting to order at 12:11 p.m., and Ms. Downs took roll call.

(CONT.) DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 32–39, 41)

Probate

Item 32/SPR26-32

Probate Conservatorship: Duties of Conservator and Acknowledgment of Receipt (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Probate and Mental Health Advisory Committee to amend one rule of court, adopt one form, and revise one form to conform to changes in conservatorship law and reduce procedural confusion. The new form provides an updated statement of the duties of a conservator formatted as a plain-language information sheet for the court to distribute to each newly appointed conservator. A conservator would use the revised form to acknowledge receipt of the statement of duties

and the Judicial Council's *Handbook for Conservators* as required by Probate Code section 1834. The rule amendment clarifies the conservator's duty to sign and file the acknowledgment of receipt and updates references to the form numbers and titles.

Action: The committee unanimously approved the recommendation from the Probate and Mental Health Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 33/SPR26-33

Probate Guardianship: Appointment of Unavailable Parent and Nominee as Joint Guardians of the Person (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Probate and Mental Health Advisory Committee recommending amending one rule, adopting one form, approving one form, and revising eight forms, renumbering one of these, to facilitate the process of petitioning for and appointing joint guardians under the law as amended by Assembly Bill 495, effective January 1, 2026. The bill gave the superior court the authority to appoint a custodial but unavailable parent together with a person nominated by that parent as joint guardians of the person of the parent's child. The proposal would also update cross-references, simplify language, and make other improvements to the forms.

Action: The committee unanimously approved the recommendation from the Probate and Mental Health Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 34/SPR26-34

Probate Law and Procedure: Forms to Implement Assembly Bill 747 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Probate and Mental Health Advisory Committee to approve two new forms, revise five forms, and revoke two forms to bring the forms used for service in probate proceedings into compliance with the new service requirements under Assembly Bill 747 (Stats. 2025, ch. 563), which made numerous changes to the Code of Civil Procedure that apply to service required under the Probate Code.

Action: The committee unanimously approved the recommendation from the Probate and Mental Health Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 35/SPR26-35

Probate Conservatorship: Revisions to Petitions, Orders, and Letters (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Probate and Mental Health Advisory Committee to adopt seven mandatory forms and revise three mandatory forms to implement portions of Assembly Bill 1663

(Stats. 2022, ch. 894) and to make conservatorship forms more accessible and user-friendly. The recommended changes would create specific forms to request and order limited conservatorships. In addition, the proposal recommends adopting new attachment forms for use in both general and limited conservatorships when requesting joint conservatorships or conservatorships of the estate.

Action: The committee unanimously approved the recommendation from the Probate and Mental Health Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Protective Orders

Item 36/SPR26-36

Protective Orders: Gun Violence Restraining Order Forms to Implement Assembly Bill 2917 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to revise two forms to implement Assembly Bill 2917 (Stats. 2024, ch. 539), which changed the types of evidence courts consider in determining whether grounds for a gun violence restraining order exist. Additionally, the proposal recommends various changes to improve the forms and to address related issues raised during the public comment period for a recent proposal to implement Senate Bill 899 (Stats. 2024, ch. 544).

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 37/SPR26-37

Protective Orders: Rules and Forms to Implement Assembly Bill 561 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Civil and Small Claims Advisory Committee to adopt 1 form, revise 23 forms, and revoke 1 form to implement Assembly Bill 561 (Stats. 2025, ch. 267), which amends the statutes governing civil harassment restraining orders and elder or dependent adult abuse restraining orders. For both of these types of restraining orders, AB 561 authorizes the electronic submission of certain documents and also authorizes certain persons to appear remotely. For elder or dependent adult abuse restraining orders, AB 561 authorizes alternative methods of service if there is reason to believe that the respondent is evading service or cannot be located.

Action: The committee unanimously approved the recommendation from the Civil and Small Claims Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Item 38/SPR26-38

Protective Orders: Changes to Forms DV-300-INFO and DV-310 (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Family and Juvenile Law Advisory Committee to revise *How Do I Ask to Change or End a Domestic Violence Restraining Order?* (form DV-300-INFO) and *Notice of Court Hearing and Temporary Order to Change or End Restraining Order* (form DV-310) to address court operational concerns and improve form usability, organization, and clarity.

Action: The committee unanimously approved the recommendation from the Family and Juvenile Law Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Traffic

Item 39/SPR26-39

Traffic: Trial by Written Declaration Forms (Action required – recommend Judicial Council action)

The committee reviewed a proposal from the Traffic Advisory Committee to revoke and revise trial by written declaration forms and make corresponding amendments to the relevant rule of court. In the past few years, several stakeholders have suggested that the trial by written declaration forms should be improved for clarity and to better assist court users. The proposed revisions include substantive changes, clearer language, and reorganized content.

Action: The committee unanimously approved the recommendation from the Traffic Advisory Committee, which is to go to the Judicial Council for action at the October council meeting.

Judicial Council Staff

Item 41

Rules and Forms: Miscellaneous Technical Changes (Action required – recommend Judicial Council action)

The committee reviewed a proposal from Judicial Council staff to make necessary corrections to ensure that the California Rules of Court and Judicial Council forms conform to law and practice and to avoid causing confusion for court users, clerks, and judicial officers.

Action: The committee unanimously approved the recommendation from Judicial Council staff, which is to go to the Judicial Council for action at the October council meeting.

ADJOURNMENT

There being no further business, the meeting was adjourned at 12:38 p.m.

Approved by the advisory body on enter date.

Judicial Council *of* California

RULES COMMITTEE
MINUTES OF ACTION BY EMAIL

October 1, 2026

Voting on this Action by Email started at 2:00 p.m. on October 1, 2026, and concluded at 4:30 p.m. on October 1, 2026.

Members Present: Hon. Michael Rhoads (Vice-chair), Ms. Marta A. Alcumbrac, Hon. Nicole C. Bershon, Hon. Benjamin J. Cassady, Hon. Rodney A. Cortez, Mr. Chad Finke, Hon. Mary J. Greenwood, Mr. Charles Johnson, Hon. Ricardo R. Ocampo, and Mr. Craig M. Peters

Members Absent: Hon. Tamara L. Wood (Chair), Hon. Bunmi O. Awoniyi, and Ms. Alekxia L. Torres Stallings

ACTION BY EMAIL

As provided in the California Rules of Court, rule 10.75 (o)(1)(B), the chair concluded that prompt action was needed. This action by email concerned matters that would otherwise be discussed in an open meeting; therefore, in accordance with rule 10.75(o)(2), public notice and the proposal were posted on Wednesday, September 30, 2026, to allow at least one complete business day for public comment before the committee took action. No public comments were received.

ACTION ITEM (ITEM 01)

Item 01/ Circulating Order Number: CO-26-04
Child Support: Income Withholding for Support

Judicial Staff recommend that the Judicial Council, effective October 14, 2026, revise *Income Withholding for Support* (form FL-195) to be consistent with a recent change to the federal version of the form that extends the form's expiration date by an additional year.

Action: The committee approved by a majority vote the recommendation from Judicial Council staff, which is to go to the Judicial Council for approval by circulating order, effective October 14, 2026.

CLOSURE OF ACTION

There being no further business, this action by email concluded on Thursday, October 1, 2026, at 4:30 p.m.

Approved by the advisory body on enter date.

Appellate Advisory Committee
Annual Agenda [DRAFT]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Allison M. Danner, Associate Justice of the Court of Appeal, Sixth District
Lead Staff: Jeremy T. Varon, Attorney, Legal Services

Advisory Body's Charge/Membership:

Rule 10.40 of the California Rules of Court states the charge of the Appellate Advisory Committee (AAC), which is to make recommendations to the Judicial Council for improving the administration of justice in appellate proceedings and to make proposals on training for justices and appellate support staff to the Center for Judicial Education and Research Advisory Committee. Rule 10.40(c) sets forth the membership positions of the committee. The AAC currently has 20 members. The current committee roster is available on the committee's webpage.

Subgroups of the Advisory Body:

1. Appellate Division Subcommittee
2. Legislation Subcommittee
3. Rules Subcommittee
4. Appellate Record Special Projects Ad Hoc Subcommittee

Advisory Body and Subgroup Meetings Planned for 2026–2027:

- October 2026 (videoconference to review winter cycle proposals)
- February 2027 (in-person to make final recommendations on winter cycle proposals and to review spring cycle proposals)
- July 2027 (videoconference to make final recommendations on spring cycle proposals)
- September 2027 (videoconference to make recommendations on annual agenda)

Subcommittee meetings: One or more teleconference or videoconference meetings of the Rules and Appellate Division subcommittees before each full committee meeting. Legislation Subcommittee to meet as needed to review relevant legislation. Appellate Record Special Projects Ad Hoc Subcommittee to meet as needed to work on rules and forms proposals.

☐ 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*: CEQA Actions: Amend CEQA Rules to Implement New Laws**

   Priority: 1a

   Supported Strategic Plan Branch Goals:

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

   Project Summary: This is a joint project with the Civil and Small Claims Advisory Committee. Develop rule recommendations as appropriate. AB 2152 (Stats. 2026, ch. 767), AB 2231 (Stats. 2026, ch. 926), SB 328 (Stat. 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 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, trial and appellate litigants; all draft proposals will circulate for public comment.

   AC Collaboration: Civil and Small Claims Advisory Committee

2. ***Project Title*: Clarify Rule 8.104(a)(1)(A)**

   Priority: 2b

   Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amendments to rules, like rule 8.104(a)(1)(A), that specify a deadline running from clerk service of the "Notice of Entry" or copy of the judgment to update those provisions to reflect electronic service requirements and practices. This project will take into account the terminology of Code of Civil Procedure sections 1010.6 and 1013b, as well as the conclusions in *Wing Inflatables, Inc v. Certain Underwriters at Lloyd's* (2025) 112 Cal.App.5th 1108 [order denying motion], and the "single document" rule in *Alan v. American Honda Motor Co., Inc.* (2007) 40 Cal.4th 894, 904.

Status/Timeline: This item was previously included as item 9 on the committee's approved annual agenda for 2025–2026. After initial subcommittee analysis, the subcommittee deferred the proposal for additional analysis. Invitation to comment planned for Winter Cycle, with 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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: N/A

3. ***Project Title*: Amend Rules on Settled Statements**

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rules and revising forms to clarify the existing process for settled statements. This proposal originated with the Appellate Efficiency Ad Hoc Subcommittee's work on how to simplify and improve the record preparation process prompted by the suggestions of the Appellate Caseflow Workgroup. This proposal may include changes to civil and family rules and forms.

Status/Timeline: This item was previously included as item 5 on the committee's approved annual agenda for 2025–2026. After initial subcommittee analysis, the subcommittee deferred the proposal for additional analysis. Invitation to comment planned for Spring Cycle, with 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, appellate litigants; any proposal will circulate for public comment.

AC Collaboration: Civil and Small Claims Advisory Committee, Family and Juvenile Law Advisory Committee

4. ***Project Title*: Respondent's Designation of Reporters' Transcripts in Code of Civil Procedure section 1294.4 Appeals**

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Appeals under Code of Civil Procedure section 1294.4 from an order dismissing or denying a petition to compel arbitration must be decided within 100 days. Under rule 8.713, appellants must file a record designation with the notice of appeal and any reporter's transcript must be filed within 10 days. However, the rule does not permit respondents to designate any additional reporter's transcript. This project would consider amending the rule to provide for respondent's designation and to establish the time for doing so. The project was recommended by a committee member to close a gap in the rule that is reported to have been problematic.

Status/Timeline: This priority 2 project was previously included as project 10 on the committee's approved annual agenda for 2025–2026. Invitation to comment planned for Spring Cycle, with 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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: Civil and Small Claims Advisory Committee; Court Executives Advisory Committee; Information Technology Advisory Committee

5. *Project Title*: Clarify the Format Requirements that Apply to Both Paper and E-Filed Briefs

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rule 8.204(b) to clarify the formatting requirements that apply to both paper and e-filed briefs. This project was suggested by a committee member.

Status/Timeline: This priority 2 project was previously included as project 13 on the committee's approved agenda for 2025–2026 but action on the project was deferred. Invitation to comment planned for Spring Cycle, with 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, appellate litigants; any proposal will circulate for public comment.

AC Collaboration: N/A

6. *Project Title*: Revise Form JV-822

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Project Summary: Consider revising the *Notice of Intent to File Writ Petition and Request for Record to Review Order Designating or Denying Specific Placement of a Dependent Child After Termination of Parental Rights* (form JV-822) to more accurately reflect rule 8.456 of the California Rules of Court. This project was suggested by a staff attorney of a superior court.

Status/Timeline: This priority 2 project was previously included as project 14 on the committee's approved agenda for 2025–2026 but action on the project was deferred. Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: Committee staff, 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, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: Family and Juvenile Law Advisory Committee

7. ***Project Title*: Amend the Filing Fee Recipient in Rule 8.100**

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rule 8.100 of the California Rules of Court to require the fee for filing a notice of appeal be paid to the Court of Appeal instead of the Superior Court. This change was suggested by the California Academy of Appellate Lawyers.

Status/Timeline: This priority 2 project was previously included as project 15 on the committee's approved agenda for 2025–2026 but action on the project was deferred. Invitation to comment planned for Spring Cycle, with 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: Appellate courts, appellate litigants; superior courts; all draft proposals will circulate for public comment.

AC Collaboration: Court Executives Advisory Committee

8. *Project Title*: Remove the Requirement to Cite Reporter's Transcript Volume Number in Rule 8.204(a)(1)(C)

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rule 8.204(a)(1)(C) of the California Rules of Court to allow citations to the reporter's transcript to not include the volume number. This change was suggested by a committee member.

Status/Timeline: Invitation to comment planned for Spring Cycle, with 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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment

AC Collaboration: N/A

9. *Project Title*: Electronic Exhibits in the Court of Appeal (PLACEHOLDER)

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider what action, if any, such as education, rule adoption or rule amendment, is necessary to clarify requirements for use of an electronic exhibits platform and increase the efficiency of the transmission of exhibits in the Court of Appeal. This change was suggested by the executive officer of one of the courts of appeal. Clarification of the rules with respect to electronic exhibits was also suggested during the Appellate Efficiency Ad Hoc Subcommittee's work on how to simplify/improve the record preparation process prompted by the suggestions of the Appellate Caseflow Workgroup.

Status/Timeline: Pending finalization of electronic exhibit platform in the Court of Appeal. This priority 2 project was previously approved by the Rules Committee as a placeholder, with a recommendation that work be deferred until finalization of electronic exhibit platform in the Court of Appeal.

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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: Information Technology Advisory Committee

10. *Project Title*: Amend Rules to Expand Privacy Protections

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rule 8.90 of the California Rules of Court to expand privacy protections to include all documents filed in the publicly accessible record. This project was suggested by a committee member.

Status/Timeline: This priority 2 project to improve privacy protections is included on the annual agenda as a two-year project, with an anticipated effective date of January 1, 2029.

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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: N/A

11. *Project Title*: Adopt Rule for Notices of Appeal Following Amended Judgments or Orders

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider adopting a new rule of court to establish what circumstances require a new notice of appeal following an amended judgment or order. This project was suggested by a committee member.

Status/Timeline: This priority 2 project is included on the annual agenda as a two-year project, with an anticipated effective date of January 1, 2029..

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, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: N/A

12. *Project Title*: Clarify Rule 8.212(a)(1) in Cases Where Appellate Attaches Transcript in Lieu of Deposit

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider amending rule 8.212(a)(1) of the California Rules of Court to clarify what deadline applies to the appellant's opening brief in cases where the appellant designates a reporter's transcript and appendix and attaches the certified transcript to the designation in lieu of a deposit. This project was suggested by a committee member.

Status/Timeline: This priority 2 project is included on the annual agenda as a two-year project, with an anticipated effective date of January 1, 2029.

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: Appellate courts, appellate litigants; all draft proposals will circulate for public comment.

AC Collaboration: N/A

Ongoing Projects and Activities

1. ***Project Title*: Improve 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: Working through the Rules Subcommittee and the Appellate Division Subcommittee, review case law changes that impact appellate courts and appellate procedure and suggestions from committee members, judicial officers, court staff, the bar, and the public concerning appellate rules and forms and appellate administration. Make recommendations to the Judicial Council for necessary changes to appellate rules, standards, and forms (rule 10.21).

   Status/Timeline: Ongoing

   Fiscal Impact/Staff Resources: Committee staff; potentially others depending on the project.

   ☐ 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: Depends on the project; all draft proposals circulate for public comment.

   AC Collaboration: As appropriate, depending on the project.

2. ***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: Project Summary: Working through the Legislative Subcommittee, review pending legislation affecting appellate procedure and court administration and make recommendations to the Legislation Committee as to whether the Judicial Council should support or oppose the legislation (rule 10.34).

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: As appropriate, depending on subject matter and scope of legislation. In the past, the committee has collaborated with the Civil and Small Claims Advisory Committee and the Criminal Law Advisory Committee.

3. ***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: Project Summary: Review enacted legislation that may have an impact on appellate procedure and court administration, and, where appropriate, propose to the Judicial Council rules and forms to implement the legislation or to bring rules and forms into conformity with it.

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: N/A

AC Collaboration: As appropriate, depending on the legislation.

4. ***Project Title*: Provide Subject-Matter Expertise**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Serve as subject matter resource for the Judicial Council, its internal committees, other advisory bodies, and Judicial Council staff to support legal work, and to avoid duplication of efforts and contribute to the development of recommendations for council action. Such efforts may include providing appellate procedural expertise and review to working groups, advisory committees, and subcommittees as needed.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Governmental Affairs, Legal Services, Criminal Justice Services, and 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: N/A

AC Collaboration: As appropriate, depending on the project for which advice or consultation was requested.

5. ***Project Title*: Rules and Forms: Miscellaneous Technical Changes**

Priority: 2a

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 correct technical errors 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 . . . ."

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

6. ***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.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. *Racial Justice Act: Revise Rules and Forms*. The committee, jointly with the Criminal Law Advisory Committee, recommended amending the California Rules of Court and revising forms to implement new Racial Justice Act legislation and address concerns raised by Court of Appeal staff.
2. *CEQA Actions: Implementation of Streamlining Legislation*. The committee, jointly with the Civil and Small Claims Advisory Committee, recommended amending the California Rules of Court governing the expedited resolution of actions and proceedings brought under the California Environmental Quality Act to implement new legislation.
3. *Appellate Caseflow Workgroup Recommendations Regarding Record Preparation*. The committee recommended amending the California Rules of Court and form changes to improve the appellate record preparation process by establishing a general requirement to use appendixes in civil appeals, clarifying rules and forms for the record designation process, and clarifying the rule on what must be included in the normal felony appellate record.
4. *Amend Rules on Settled Statements*. The committee began work to develop a recommendation for clarifying rule 8.137 of the California Rules of Court.
5. *Clarify Rule 8.140*. The committee recommended amending the Advisory Committee Comment to rule 8.140 of the California Rules of Court to clarify what acts are required or necessary to procure the record.
6. *Form for Court to Issue an Order on an Extension of Time Application in the Appellate Division*. The committee recommended approving a new optional form for courts to use to issue an order on an of extension of time application in misdemeanor, infraction, and limited civil appeals.
7. *Clarify Rule 8.104(a)(1)(A)*. The committee began work to develop a recommendation for clarifying rule 8.104(a)(1)(A) of the California Rules of Court.
8. *Amend the File Size Limit for Electronic Filings in the Court of Appeal*. Together with the Information Technology Advisory Committee, the committee recommended amending rule 8.74 of the California Rules of Court to increase the file size limit from 25 megabytes to 100 megabytes in the Court of Appeal.
9. *Review of Pending Legislation:* The committee reviewed and made recommendations regarding council position on bills with potential impacts on appellate proceedings.

Civil Jury Instructions Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: [DATE]

I. COMMITTEE INFORMATION

Chair: Hon. Ioana Petrou, Associate Justice of the Court of Appeal, First Appellate District, Division Three
Lead Staff: Eric Long, Supervising Attorney, Legal Services

Advisory Body's Charge/Membership:

Rule 10.58 of the California Rules of Court states the charge of the Advisory Committee on Civil Jury Instructions, which is to make recommendations to the Judicial Council for updating, amending, and adding topics to the *Judicial Council of California Civil Jury Instructions* (*CACI*).

Rule 10.58 sets forth the membership categories for the committee. The Advisory Committee on Civil Jury Instructions currently has 25 members (a majority of which must be judges). Under rule 10.58, the committee must include at least 1 member from each of the following categories: (1) appellate court justice; (2) trial court judge; (3) lawyer whose primary area of practice is civil law; and (4) law professor whose primary area of expertise is civil law. The current committee membership roster is available on the committee's webpage.

Subgroups of the Advisory Body:

1. Subgroups of the Advisory Body: The advisory committee has three subcommittees (referred to internally as working groups). Each working group is made up exclusively of committee members. Each working group reviews approximately one third of the proposed meeting agenda before the full committee meeting and makes recommendations to the committee regarding each proposal. The three working groups are (and are so numbered because the committee's original six working groups were consolidated into three):
    1. Working Group 12
    2. Working Group 34
    3. Working Group 56

Advisory Body and Subgroup Meetings Planned for 2026–2027:

- Three working group meetings in December 2026, 10:00 a.m.–2:00 p.m., videoconference
- Advisory committee meeting: on January 28, 2027, 10:00 a.m.–4:00 p.m., San Francisco with hybrid videoconference option
- Three working group meetings in June 2027, 10:00 a.m.–2:00 p.m., videoconference
- Advisory committee meeting on August 5, 2027, 10:00 a.m.–4:00 p.m., San Francisco with hybrid videoconference option
- Due to the nature of the advisory committee's work and the detailed drafting that is required to write civil jury instructions that are legally accurate and understandable to the average juror, two in-person meetings have been authorized by the internal committee oversight chair. To fulfill its charge to maintain *CACI*, to add instructions in new areas of the law, and to augment existing subject matter areas, two in-person meetings for the full committee are planned as noted above.

☒ 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*: None**

   Priority: N/A

   Supported Strategic Plan Branch Goals:

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

   Project Summary: N/A

   Status/Timeline: N/A

   Fiscal Impact/Staff Resources: N/A

   ☐ 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

Ongoing Projects and Activities

1. ***Project Title*: Maintenance—Case Law**

   Priority: 1

   Supported Strategic Plan Branch Goals:

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

   Project Summary: Review new case law affecting jury instructions to determine whether changes to any civil jury instructions are required. Draft and present proposed changes for council approval.

   Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed.

   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: None.

   AC Collaboration: None

2. ***Project Title*: Maintenance—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 new legislation affecting jury instructions to determine whether changes to any civil jury instructions are required. Draft and present proposed changes for council approval.

Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed.

Fiscal Impact/Staff Resources: None.

☐ 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: None.

AC Collaboration: None.

3. ***Project Title*: Maintenance—Comments from Users**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Review suggestions received from jury instruction users, including the bench and bar; draft and propose changes and refinements, as appropriate, based on user suggestions.

Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed.

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: None.

AC Collaboration: None.

4. ***Project Title*: New Instructions and Expansion into New Subject Matter Areas**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Review new legislation, case law, and suggestions received from jury instruction users; draft and propose new civil jury instructions, including new series of instructions in an entirely new subject area, as appropriate.

Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings.

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: None.

AC Collaboration: None.

5. ***Project Title*: Maintenance—Sources and Authority**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Update Sources and Authority citations and case quotations as appropriate.

Status/Timeline: Ongoing, with delivery to the Judicial Council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority—for example, adding cases and statutes to and removing them from the Sources and Authority and editing the Sources and Authority—as needed.

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: None.

AC Collaboration: None.

6. ***Project Title*: Maintenance—Secondary Sources**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Update Secondary Source citations to ensure that the secondary sources included in *CACI* are up to date.

Status/Timeline: Ongoing, with delivery to the Judicial Council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority—for example, adding, removing, and editing Secondary Sources—as needed.

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: None.

AC Collaboration: None.

7. ***Project Title*: Technical Corrections**

***Priority:* 1**

Supported Strategic Plan Branch Goals:

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

Project Summary: Make any necessary corrections or editing changes to the jury instructions.

Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority—nonsubstantive grammatical and typographical corrections to the jury instructions, as well as minor substantive changes unlikely to create controversy—as needed.

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: None.

AC Collaboration: None.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. **Maintenance—Case Law, Legislation, and Comments from Users:** Reviewed case law and new legislation affecting jury instructions, as well as comments from jury instruction users, to determine whether changes to the civil jury instructions were required or appropriate. Releases presented to the Judicial Council for approval on July 17, 2026, and anticipated to be presented to the Judicial Council on or about December 11, 2026. Releases 48 (the 2026 edition of *CACI* approved by the council in December 2025) and 49 (the midyear supplement to the 2026 edition of *CACI* approved by the council in July 2026) included revisions to 84 instructions and verdict forms to bring them up to date.
2. **New Instructions and Expansion into New Subject Matter Areas:** Reviewed case law and new legislation affecting jury instructions, as well as comments from jury instruction users, and proposed new civil jury instructions as appropriate. Releases presented to the Judicial Council for approval on July 17, 2026, and anticipated to be presented to the Judicial Council on or about December 11, 2026. Releases 48 and 49 included one new instruction in the Breach of Fiduciary Duty series and one new instruction in the Unlawful Detainer and Other Landlord-Tenant Claims series, which previously had only covered claims for Unlawful Detainer.
3. **Maintenance—Sources and Authority:** Reviewed case law and new legislation and proposed inclusion of excerpts and citations from new sources and authority. Updates to the Sources and Authority presented to the Judicial Council for approval on July 17, 2026, and anticipated to be presented to the Judicial Council on or about December 11, 2026, and other updates to the Sources and Authority approved by the council's Rules Committee through a delegation of authority in October 2025 and June 2026.
4. **Maintenance—Secondary Sources:** Updated citations in *CACI*'s Secondary Sources. Releases presented to the Judicial Council for approval on July 17, 2026, and anticipated to be presented to the Judicial Council on or about December 11, 2026, and other secondary sources approved by the council's Rules Committee through a delegation of authority in October 2025 and June 2026.
5. **Technical Corrections:** Made necessary corrections or editing changes to the jury instruction publication.

Criminal Jury Instructions Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Lisa B. Lench, Judge, Superior Court of Los Angeles County
Lead Staff: Kara Portnow, Supervising Attorney, Criminal Justice Services

Advisory Body's Charge/Membership:

Rule 10.59 of the California Rules of Court states the charge of the Advisory Committee on Criminal Jury Instructions (CALCRIM), which is to regularly review case law and statutes affecting jury instructions and to make recommendations to the Judicial Council for updating, amending, and adding topics to the council's criminal jury instructions.

Rule 10.59 also sets forth the membership position of the committee. The Advisory Committee on Criminal Jury Instructions has 13 members. The current committee roster is available on the committee's webpage.

Subgroups of the Advisory Body:

The committee has one subcommittee, the CALCRIM Workgroup, currently consisting of six members who meet to review and evaluate all materials before they go to the full committee for review.

Advisory Body and Subgroup Meetings Planned for 2026–2027:
Two full in-person committee meetings in San Francisco: October 9, 2026, and May 2027 (date TBD). Two CALCRIM Workgroup meetings ahead of the full committee meetings: September 11, 2026, and April 2027 (date TBD) by videoconference.

☒ 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. **None.**

Ongoing Projects and Activities

1. ***Project Title*: Maintenance—Case Law and 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 case law and new legislation affecting jury instructions to determine whether changes to the criminal jury instructions are required. Judicial Council direction: Draft and maintain jury instructions that accurately and understandably state the law.

   Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings.

   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: Not applicable.

   AC Collaboration: Not applicable.

2. ***Project Title*: Maintenance—Comments from Users**

   Priority: 1

   Supported Strategic Plan Branch Goals:

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

   Project Summary: Review comments received from jury instruction users and propose any necessary changes and improvements. Judicial Council direction: Draft and maintain jury instructions that accurately and understandably state the law.

Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings.

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: Not applicable.

AC Collaboration: Not applicable.

3. ***Project Title*: New Instructions and Expansion into New Areas**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Review suggestions received from jury instruction users, new legislation, and case law and propose new criminal jury instructions as appropriate. Judicial Council direction: Draft and maintain jury instructions that accurately and understandably state the law.

Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings.

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: Not applicable.

AC Collaboration: Not applicable.

4. ***Project Title*: Technical Corrections**

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Make any necessary corrections or editing changes to the jury instructions. Judicial Council direction: Draft and maintain jury instructions that accurately and understandably state the law.

Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings.

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: Not applicable.

AC Collaboration: Not applicable.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. **Maintenance—Case Law and Legislation:** Reviewed case law and new legislation affecting jury instructions to determine whether changes to the criminal jury instructions are required. Releases presented to Judicial Council for approval in February 2026 and October 2026. Updated 66 instructions (approved by the Judicial Council in February 2026) and 27 instructions (approved by the Judicial Council in October 2026).
2. **Maintenance—Comments From Users:** Reviewed comments received from jury instruction users and proposed necessary changes and improvements. Releases presented to Judicial Council for approval in February 2026 and October 2026.
3. **New Instructions and Expansion into New Areas:** Reviewed new legislation and case law and suggestions received from jury instruction users and proposed new criminal jury instructions as appropriate. Releases presented to Judicial Council for approval in February 2026 and October 2026. Drafted four new instructions based on user requests and case law (approved by the Judicial Council in February 2026), two new instructions based on case law (approved by the Judicial Council in October 2026).
4. **Technical Corrections:** Made necessary corrections or editing changes to the jury instructions. Releases presented to Judicial Council for approval in February 2026 and October 2026.

Civil and Small Claims Advisory Committee
Annual Agenda [DRAFT]—2026–2027
Approved by Rules Committee: Enter a date

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.

Criminal Law Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Lisa Rodriguez, Chair, Judge, Superior Court of San Diego County; Hon. Alison Tucher, Vice-Chair, Presiding Justice of the Court of Appeal, First Appellate District, Third Division
Lead Staff: Deanna Adams, Attorney, Criminal Justice Services

Advisory Body's Charge/Membership:

Rule 10.42(a) of the California Rules of Court states the charge of the Criminal Law Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in criminal proceedings.

Rule 10.42(b) sets forth the membership categories of the committee. The Criminal Law Advisory Committee currently has 21 voting members. The current advisory body roster is available on the advisory body's webpage.

Subgroups of the Advisory Body:

1. Pretrial Policy and Data Subcommittee
2. Joint Mental Health Legislation Subcommittee (with the Collaborative Justice Courts Advisory Committee)

Advisory Body and Subgroup Meetings Planned for 2026–2027:

- October, November, December 2026 (remote meetings to discuss rule and form proposals)
- January 2027 (in-person annual meeting to discuss rule and form proposals and pending legislation)
- February, March 2027 (remote meetings to discuss rule and form proposals and pending legislation)
- April, May, June 2027 (remote meetings to discuss pending legislation)
- July 2027 (remote meeting to discuss rule and form proposals and pending legislation)
- August, September, October 2027 (remote meetings to discuss pending legislation)
- November, December 2027 (remote meetings to discuss rule and form proposals and recently enacted legislation)
- Other remote meetings as needed

Subcommittee Meetings:

- Pretrial Policy and Data Subcommittee: remote meetings as needed to work on rule and form proposals and review proposed legislation
- Joint Mental Health Legislation Subcommittee: remote meetings as needed from February through September to review proposed legislation

☐ 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*: *Revise criminal protective orders to implement statutory changes (one-time)***

   Priority: 1a

   Supported Strategic Plan Branch Goals:

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

   Project Summary: This project will incorporate statutory changes extending the category of protected persons and/or protective order terms to existing criminal protective orders, including AB 2261 (Stats. 2026, ch. 595), and implement AB 1753 (Stats. 2026, ch. 458) as it relates to the issuance of a criminal protective order in a hate crime-related case. The committee will also consider requests from the public and committee members to (1) clarify procedures for terminating a pretrial protective order when replaced by a postconviction order; (2) consider removing or removing relinquishment compliance items that were added, effective January 1, 2026, to implement AB 2907 (Stats. 2024, ch. 538) and Senate Bill 899 (Stats. 2024, ch. 544); and (3) align who may be included as a protected person in a postconviction order with relevant caselaw.

   Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

   Fiscal Impact/Staff Resources: Committee staff will prepare the revised forms, Legal Services staff will complete legal and drafting review.

   ☐ 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, justice system partners

   AC Collaboration: Civil and Small Claims Advisory Committee, Family and Juvenile Law Advisory Committee

2. ***Project Title*: *Amend mental competency rules of court to implement statutory changes (one-time)***

   Priority: 1a

   Supported Strategic Plan Branch Goals:

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

Project Summary: This project will incorporate statutory changes to the rules on competency to stand trial, including changes under Assembly Bill 46 (Stats. 2026, ch. 18), which changed suitability determinations for mental health diversion, and Senate Bill 820 (Stats. 2025, ch. 330), which allows a psychiatrist or licensed psychologist's opinion on the defendant's capacity to make decisions regarding antipsychotic medication to apply to misdemeanor cases. The committee may consider a request from a member of the public to add procedural safeguards to the competency to stand trial rules aimed at reducing exploitation risks for people subject to a competency proceeding.

Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: Committee staff will prepare amended rules, Legal Services staff will complete legal and drafting review.

☐ 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, justice system partners

AC Collaboration: None

3. ***Project Title*: *Revise forms related to victim restitution***

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: This project will implement statutory changes under Assembly Bill 2297 (Stats. 2026, ch. 841), which clarifies that victim restitution must be ordered when a defendant participates in a diversion program, requiring changes to *Order for Victim Restitution* (form CR-110/JV-790) and the corresponding instruction form (CR-112/JV-792). This project will also clarify victim restitution orders for defendants sentenced to state prison based on a suggestion from the California Department of Corrections and Rehabilitation (CDCR). This may include updates to form CR-110 and several abstract of judgment forms. The committee may also consider further revisions to update the abstract of judgment forms, which have not been substantively revised since criminal justice realignment.

Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: Committee staff will prepare revised forms, Legal Services staff will complete legal and drafting review.

☐ 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, justice system partners, CDCR

AC Collaboration: None

4. ***Project Title*: *Amend California Rules of Court, rule 4.421, on circumstances in aggravation (one-time)***

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee may consider revising the aggravating factors in California Rules of Court, rule 4.421 to reflect jury consideration of these factors when an upper term is sought under Senate Bill 567 (Stats. 2021, ch. 731).

Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: Committee staff will prepare amended rules, Legal Services staff will complete legal and drafting review.

☐ 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, justice system partners

AC Collaboration: None

5. ***Project Title*: *Develop ability to pay tools (one-time)***

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: The project will develop ability to pay tools in light of *People v. Kopp* (2025) 19 Cal. 5th 1, requiring a court to consider a defendant's inability to pay specified post-conviction ancillary costs, and *In re Kowalczyk* (2026) 19 Cal. 5th 593, requiring a court to assess a defendant's ability to pay monetary bail.

Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: Committee staff will prepare rules and forms, Legal Services staff will complete legal and drafting review.

☐ 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, justice system partners

AC Collaboration: None

6. ***Project Title*: *Protective Orders (new)***

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; staff from Legal Services and Center for Families, Children and the Courts, as applicable

☐ 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: Civil and Small Claims Advisory Committee and Family and Juvenile Law Advisory Committee, as applicable

Ongoing Projects and Activities

1. ***Project Title*: *Pretrial release implementation through rules and forms***

   Priority: 1a

   Supported Strategic Plan Branch Goals:

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

   Project Summary: The committee will consider developing rule and form proposals on pretrial release or detention, such as providing guidance on implementing the holdings of *In re Humphrey* (2021) 11 Cal.5th 135, *In re Kowalczyk* (2026) 19 Cal.5th 593, and related cases, the imposition of pretrial release conditions, and determining a defendant's ability to pay.

   Status/Timeline: Invitation to comment planned for spring 2027, for an anticipated effective date of January 1, 2028.

   Fiscal Impact/Staff Resources: Committee staff, Criminal Justice Services Pretrial unit staff, Legal Services 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, justice system partners

   AC Collaboration: None

2. ***Project Title*: *Pretrial release implementation through court outreach***

   Priority: 1

   Supported Strategic Plan Branch Goals:

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

Project Summary: Consistent with the committee's charge to improve administration of justice in criminal proceedings and related to the committee's ongoing work on pretrial release rules and forms, the committee will provide subject matter expertise for the Judicial Council's Criminal Justice Services Pretrial unit to promote consistent implementation of pretrial release or detention decisions statewide.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, Criminal Justice Services 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

AC Collaboration: None

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: The committee will review pending criminal law legislation and provide recommendations as to whether the Judicial Council should support or oppose the legislation. The committee will provide subject matter expertise on pending criminal law legislation.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Governmental Affairs, 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: None

AC Collaboration: Joint Mental Health Legislation Subcommittee (with Collaborative Justice Courts Advisory Committee)

4. ***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 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 whether amendments to the rules of court or revisions to Judicial Council forms are needed to implement the legislation or to bring rules and forms into conformity with it.

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: To be determined

AC Collaboration: To be determined

5. ***Project Title*: *Provide subject matter expertise for other advisory committees***

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will provide subject matter expertise for the Judicial Council and other advisory committees working on proposals involving criminal law and procedure.

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: None

AC Collaboration: Respective advisory committees

6. ***Project Title*: *Gender neutrality in 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 rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gender-specific terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity.

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: None

AC Collaboration: None

7. ***Project Title*: *Miscellaneous technical changes to rules and forms***

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 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….".

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, Legal Services 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: None

AC Collaboration: None

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.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. ***Revise the felony plea form.*** At its April 2026 meeting, the Judicial Council approved revisions to the felony plea form (CR-101) recommended by the advisory committee to implement SB 281 (Stats. 2025, ch. 666), which requires courts to use the verbatim language of the immigration advisement in Penal Code section 1016.5(a). The form became effective July 1, 2026.
2. ***Amend rules and revise forms to implement AB 1071.*** At its April 2026 meeting, the Judicial Council approved amendments to rules of court and revisions to forms recommended by the advisory committee to implement AB 1071 (Stats. 2025, ch. 721), which revised and clarified procedures under Penal Code section 745. The amended rules and revised forms became effective July 1, 2026.
3. ***Amend sentencing rules of court to conform with recent law.*** At its October 2026 meeting, the Judicial Council approved amendments to rules of court on felony sentencing recommended by the advisory committee to conform with recent case law and statutory changes. The amendments become effective January 1, 2027.
4. ***Implement consistent and clear procedures for sealing court records.*** The committee anticipates recommending a legislative proposal for Judicial Council approval at the council's December 2026 meeting that would seek to promote clarity and consistency in the process for sealing arrest records when relief is granted under a record clearing statute. At its October 2026 meeting, the Judicial Council approved revisions to the *Order for Dismissal (Military Personnel)* form recommended by the advisory committee to remove an item directing courts to forward sealing orders to the Department of Justice. The revision becomes effective January 1, 2027.
5. ***Develop procedures for affordable bail determination and pretrial release processes.*** At its October 2026 meeting, the Judicial Council approved revisions to a pretrial release or detention form recommended by the advisory committee to implement recent case law. The revisions become effective January 1, 2027.
6. ***Review pending legislation.*** The committee provided subject matter expertise or a recommended position on 33 criminal law bills, including: **AB 910**, Criminal procedure: sentencing; **AB 1538**, Crimes: corruption; **AB 1595**, Criminal procedure: writs of habeas corpus and motions to vacate; **AB 1656**, Human trafficking case continuances; **AB 1917**, Criminal procedure: information; **AB 2104**, Sexually violent predators; **AB 2502**, Driving under the influence: driving automation; **SB 562**, Bail; **SB 1056**, Criminal procedure; **SB 1173**, Jury instructions: lesser related offenses; **SB 1395**, Criminal procedure: protective orders; and **SB 1401**, Criminal procedure: competence to stand trial.
7. ***Criminal justice and mental health.*** The committee reviewed pending legislation related to criminal justice and mental health and provided recommendations as to whether the Judicial Council should support or oppose the legislation. Pending legislation included: **AB 46**, Diversion; **AB 2275**, Mental health diversion; and **SB 1373**, Diversion. Committee members participated in a joint subcommittee on mental health legislation with members of the Collaborative Justice Courts Advisory Committee.

Family and Juvenile Law Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Tari L. Cody, Presiding Justice of the Court of Appeal, Second Appellate District, Division Six
Hon. Stephanie E. Hulsey, Judge of the Superior Court of California, County of Monterey
Lead Staff: Ms. Sarah Jacobvitz, Attorney, and Ms. Stephanie Lacambra, Attorney, Center for Families, Children & the Courts

Advisory Body's Charge/Membership:

Rule 10.43(a) of the California Rules of Court states the area of focus for the Family and Juvenile Law Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in all cases involving marriage, family, or children. Rule 10.43(b) sets forth the membership positions of the committee, which currently has 35 voting members. The Family and Juvenile Law Advisory Committee webpage provides the composition of the committee.

Subgroups of the Advisory Body:

1. Protective Order Working Group (POWG)
2. Violence Against Women Education Project (VAWEP)

Advisory Body and Subgroup Meetings Planned for 2026–2027:

The committee regularly meets by videoconference on Mondays from 4:30 to 5:30 p.m. The committee will meet once in person in Spring 2027. POWG meets approximately four to six times by videoconference as needed based on the rulemaking schedule. VAWEP meets in-person or by videoconference at least once a year.

☐ 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*:** Family Law: Implementation of AB 1267 regarding minors marrying or establishing domestic partnerships (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 Assembly Bill 1267 (Pellerin; Stats. 2026, ch. 850), which repeals numerous code provisions which in effect repeal authorization for minors to be issued a marriage license or to establish a domestic partnership, from marrying or establishing domestic partnerships. AB 1267 will likely require amending or repealing rules and revoking forms.

   Status/Timeline: Legislation effective January 1, 2027. A staff report may be prepared to ensure forms correctly reflect the law when AB 1267 becomes effective. Invitation to Comment planned for Winter Cycle with an anticipated effective date of July 1, 2027, for any additional changes recommended in the invitation to comment.

   Fiscal Impact/Staff Resources: Center for Families, Children & the Courts (CFCC) staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

   AC Collaboration: None.

2. ***Project Title*:** Family Law: Revisions to implement AB 2195 and improve forms regarding relief from license suspension or denial for child support obligors (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 legislation and to improve forms regarding relief from license suspension or denial for support obligors. Assembly Bill 2195 (Rodriguez; Stats. 2026, ch. 291) revises some requirements regarding relief from license suspension or denial for nonpayment for income-eligible child support obligors. Possible forms include *Notice of Motion for Judicial Review of License Denial* (form FL-670) and *Order After Judicial Review of License Denial* (form FL-675) to clarify the judicial review process of license denials under Family Code section 17520.

Status/Timeline: Invitation to comment planned for Spring 2027 Cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Department of Child Support Services (DCSS). Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

3. ***Project Title*:** Family Law: Implementation of SB 1364 regarding family law cases involving findings of sexual assault (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 Senate Bill 1364 (Menjivar; Stats. 2026, ch. 848), which defines sexual assault for the purposes of child custody cases and revises the laws regarding child custody, visitation, parentage, and freedom from parental custody and control in certain cases involving sexual assault. The committee will also consider whether to develop new forms, such as forms for the process to free a child from parental custody or control, to implement the legislation.

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

Fiscal Impact/Staff Resources: CFCC staff; Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

4. ***Project Title*:** Family Law: Implementation of AB 1875 regarding waiting period for dissolution of marriage (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 Assembly Bill 1875 (Hart; Stats. 2026, ch. 556), which authorizes the court to reduce or waive the 6-month waiting period for dissolution of marriage to be made final.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

5. ***Project Title*:** Family Law: Revisions to implement AB 2782 and to improve rules and forms regarding financial disclosures (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 legislation, respond to identified concerns, and improve usability. Assembly Bill 2782 (Kalra; Stats. 2026, ch. 640) provides that parties are not required to exchange certain financial declarations in dissolution cases if the parties have an existing enforceable judgment of legal separation that adjudicates the division of property Possible form revisions include *Declaration of Disclosure* (form FL-140) and *Declaration Regarding Service of Declaration of Disclosure* (form FL -141), which the committee will also consider revising in response to suggestions made by courts, stakeholders, and the public.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

6. ***Project Title*:** Family Law: Implementation of AB 2789 regarding notice of family court services appointments (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 Assembly Bill 2789 (Kalra; Stats. 2026, ch. 118), which changes the notice requirements to parties who participate in Family Court Services sessions to receive notice of their appointments. The committee will also consider whether to develop new forms, such as a statewide notice form for family court services appointments, to implement the legislation.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

7. ***Project Title*:** Family Law: Implementation of SB 927 regarding petition for readoption by adoptee and proof required to grant petition for readoption (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 Senate Bill 927 (Choi; Stats. 2026, ch. 127), which permits an adoptee of any age whose adoption was finalized in a foreign country to petition for their own readoption if neither their adoptive parents nor the domestic adoption agency that facilitated their adoption has done so. SB 927 also changes the requirements of proof for the court to grant a petition for readoption. The committee will also consider whether to develop new forms, such as a new petition form specific to adoptees petitioning for readoption and a companion information sheet.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

8. ***Project Title*:** Family Law: Implementation of SB 1192 regarding new process to prevent litigation abuse in cases involving domestic violence (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 Senate Bill 1192 (Rubio; Stats. 2026, ch. 847), which creates a process for victims of domestic violence who are parties to a civil action to seek protection from abusive litigation by requesting a prefiling order. SB 1192 also establishes a process by which a party subject to a prefiling order may apply to have the order vacated.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: Civil and Small Claims Advisory Committee (CSCAC).

9. ***Project Title*:** Juvenile Law: Reentry following WIC § 782 dismissal (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 address when the court should automatically resume jurisdiction after a case is dismissed under Welfare and Institutions Code section 782.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an expected effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

10. ***Project Title*****:** Juvenile Law: Relative placement preference reforms (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 Assembly Bill 1846 (Stefani; Stats. of 2026, ch. 276), which strengthens and clarifies California's relative-placement preference in dependency cases by clarifying that the relative placement preference extends throughout the dependency proceeding, unless and until parental rights are terminated.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

11. ***Project Title*****:** Juvenile Law: Kinship family approval (KFA) process (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 Assembly Bill 2478 (Schultz; Stats. 2026, ch. 611), which establishes a Kinship Family Approval process—an alternative, less burdensome approval pathway for relatives, nonrelative extended family members (NREFMs), and extended family members of Indian children to become foster caregivers. This pathway is aligned with new federal title IV-E rules allowing different licensing standards for kin. This bill converts the previously-envisioned "simplified approval process" (authorized by Assembly Bill 2830) into a fully fleshed-out statutory framework.

Status/Timeline: The committee anticipates this to be a two-year project. Invitation to comment planned for the Spring 2028 cycle, with an anticipated effective date by January 1, 2029.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

12. ***Project Title*****:** Juvenile Law: Family and placement history (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 Senate Bill 534 (Padilla; Stats. of 2026, ch. 415), which expands the information that child welfare agencies must provide at the final review hearing before a youth turns 18 and at each subsequent nonminor review hearing by requiring detailed "family history and placement history," including the last known whereabouts and full contact information—telephone, cell phone, physical address, email, and any known social media accounts—for parents and siblings, while allowing the youth to decline receiving it. The bill replaces the prior, more general requirement with a specific list of mandatory data elements, clarifies subdivision (c) to align with Welfare and Institutions Code section 366.31's review hearing structure for nonminors, and includes a fiscal clause limiting any new local responsibilities to those funded by the state.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

13. ***Project Title*****:** Juvenile Law: Updating notice requirements for temporary guardianship changes under AB 1689 (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 Assembly Bill 1689 (Quirk-Silva; Stats. 2026, ch. 542), which amends Welfare and Institutions Code section 728(a) to clarify the juvenile court's authority to terminate or modify a temporary probate guardianship at any properly noticed hearing if the court determines that termination or modification is in the child's best interests. The committee will consider whether to develop new forms or to revise existing forms for the findings and orders required by AB 1689.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

14. ***Project Title*****:** Juvenile Law: Juvenile probation time limits (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 Assembly Bill 1886 (Elhawary; Stats. 2026, ch. 904), which standardizes the 12-month juvenile probation limit by removing exceptions for foster care placements and secure youth treatment facility (SYTF)-related transitions. Courts retain limited jurisdiction to finish exit procedures but cannot continue probation or impose conditions after the 12-month period ends (unless SYTF baseline terms remain).

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

15. ***Project Title*****:** Juvenile Law: Welfare and Institutions Code § 876 and continuous juvenile custody (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 Assembly Bill 1902 (Pellerin; Stats. 2026, ch. 836), which amends Welfare and Institutions Code section 876 to require that any youth subject to an extended commitment petition remain continuously in custody—not only in a Secure Youth Treatment Facility (SYTF), but also, if appropriate, in a state mental health hospital or other qualifying adult secure institution—until all proceedings conclude.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

16. *Project Title*: Juvenile Law: Improving firearms eligibility data systems (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 to implement Assembly Bill 2339 (Gipson; Stats. 2026, ch. 462), which strengthens California's firearms prohibition reporting system by establishing uniform, mandatory data collection requirements for involuntary mental health detentions, clarifying reporting responsibilities, and ensuring Department of Justice (DOJ) receives complete, verifiable identifying information needed to enforce firearms prohibitions. AB 2339 also expands access to sealed juvenile records for firearms suitability determinations, clarifies the duration of certain firearm bans, and makes technical and confidentiality enhancements. This bill requires juvenile courts to notify DOJ when a juvenile's firearm prohibition status is lifted (e.g., dismissal granted for a youth previously prohibited until age 30) and authorizes DOJ to use sealed juvenile records to determine firearm suitability and provide the sealed records back to the juvenile subject only for the purpose of reviewing the DOJ's suitability determination.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

17. *Project Title*: Juvenile Law: Juvenile detention reform (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 Senate Bill 1009 (Becker; Stats. 2026, ch. 996), which significantly tightens the standard for confining youth by prohibiting courts from ordering detention in juvenile hall unless they first find that every less restrictive alternative is unsuitable. It further requires courts, upon request, to reconsider continued detention based on current information, and it amends Welfare and Institutions Code section 726 to prohibit removal from parental custody upon wardship unless no less restrictive disposition is suitable. SB 1009 obligates courts to evaluate reasonable efforts, available services, and all relevant evidence—including recommendations from counsel and probation—before ordering or continuing detention, and it requires courts to state on the record the reasons supporting any finding that a less restrictive alternative is inadequate.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

18. ***Project Title*:** Protective Orders: Implementation of AB 2534 regarding relief for victims of forced marriage in Domestic Violence Prevention Act cases (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 Assembly Bill 2534 (Kalra; Stats. 2026, ch. 950), which defines forced marriage for purposes of the Domestic Violence Prevention Act (DVPA), clarifies the definition of abuse under the DVPA to explicitly include forced marriage, and authorizes the court to grant additional relief in cases of forced marriage or attempted forced marriage.

Status/Timeline: Proposal anticipated to circulate in the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

19. ***Project Title*:** Protective Orders: Implementation of AB 1753 and AB 1657 regarding notice and service of protective orders and registration of protective orders issued by another jurisdiction (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 Assembly Bill 1753 (Stefani; Stats. 2026, ch. 458), which changes the procedures for notice of civil protective orders other than those issued under the DVPA, registration protective orders issued by another jurisdiction, and service of protective orders. Assembly Bill 1657 (Rogers; Stats. 2026, ch. 368) changes the notice procedures for protective orders issued under the DVPA.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: California DOJ, California State Sheriff's Association. Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: CSCAC, Tribal Court–State Court Forum.

20. *Project Title*: Appellate Procedure: Amend rules on settled statements (New Project).

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: In collaboration with the Appellate Advisory Committee (AAC), the committee will consider making recommendations to amend rules and revise forms to clarify the existing process for settled statements. This proposal originated with the AAC's Appellate Efficiency Ad Hoc Subcommittee's work on how to simplify and improve the record preparation process prompted by the suggestions of the AAC's Appellate Caseflow Workgroup.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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, appellate litigants; any proposal will circulate for public comment.

AC Collaboration: AAC.

21. ***Project Title*****:** Juvenile Law: Clarifying statutory timelines in rule 5.670 (New Project).

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: As resources permit, the committee will consider amending rule 5.670 to clarify and reference the statutory timelines that govern when a dependency petition must be filed and when a detention hearing must be held. After duplicative statutory language was removed from the rule in 2017, it no longer directs readers to the timelines established in Welfare and Institutions Code sections 313 and 315. Without these references, the rule has been misinterpreted as creating a separate 48-hour requirement for holding a detention hearing, particularly in cases involving protective-custody warrants, and this ambiguity has contributed to confusion in litigation. The committee will consider amendments to ensure rule 5.670 accurately reflects existing law and promotes consistent application.

Status/Timeline: The committee anticipates this to be a two-year project. Invitation to comment planned for the Spring 2028 cycle with an anticipated effective date of January 1, 2029.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

22. ***Project Title*****:** Juvenile Law: Advise on Court Appointed Special Advocates (CASA) grants program funding and program oversight (Welf. & Inst. Code, § 100 et seq.) (One-Time Project).

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: (1) Oversee recommendations to the Judicial Council for allocation of $2.713 million; (2) Oversee recommendations to the Judicial Council to award a total of $19.9 million in general funds to the California Court Appointed Special Advocate Association (California CASA) for support of local CASA programs; (3) Oversee Judicial Council legislative reporting requirements.

Status/Timeline: The Budget Act of 2026 specifies that $19.9 million be appropriated to the California CASA for FY 2026–27. A report to the Legislature by the Judicial Council is due by July 1, 2027. This program is to be completed by the end of FY 2027–28.

Fiscal Impact/Staff Resources: CFCC staff, Budget Services 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: California CASA

AC Collaboration: None.

23. ***Project Title*****:** Juvenile Law: Revision of forms JV-180 and JV-183 and amendment of rule 5.570 (previously approved One-Time 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 recommendations for changes to rule 5.570 and two forms: *Request to Change Court Order* (form JV-180) and *Court Order on Form JV-180, Request to Change Court Order* (form JV-183) to apply to Welfare and Institutions Code section 388 petitions improperly filed before disposition. Consider developing an information form to accompany the *Request to Change Court Order* (form JV-180). This proposal was circulated in the Spring 2026 invitation-to-comment cycle and the comments received caused the committee to consider additional changes.

Status/Timeline: Invitation to comment planned for the Spring 2027 cycle with an anticipated effective date of January 1, 2028.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

24. ***Project Title*****:** Revising form JV-200 (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: As resources permit, develop recommendations to revise form JV-200 to document findings of domestic violence in juvenile dependency cases. This change would allow dependency courts to clearly and reliably communicate domestic-violence information from dependency matters for use in family court. The committee will also consider additional changes to improve how the form conveys relevant juvenile court findings and to enhance overall clarity and usability.

Status/Timeline: The committee anticipates this to be a two-year project. Invitation to comment planned for the Spring 2028 cycle with an anticipated effective date of January 1, 2029.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: None.

25. ***Project Title*****:** Juvenile Law: Advise on court-appointed counsel funding allocation methodology (One-Time Project).

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Provide input as appropriate to the Trial Court Budget Advisory Committee (TCBAC) as it reviews the workload funding model for court-appointed dependency counsel in 2026 and 2027. The Budget Act of 2026 appropriates $186.7 million to be distributed to statewide court-appointed dependency counsel for FY 2026–27.

Status/Timeline: TCBAC Funding Methodology Subcommittee Court-Appointed Dependency Counsel working group anticipates referring issues to the committee in late 2026; the response timeline has not been determined.

Fiscal Impact/Staff Resources: CFCC staff, Budget Services 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: Court-appointed counsel providers.

AC Collaboration: TCBAC.

Ongoing Projects and Activities

1. ***Project Title*:** Miscellaneous technical changes to rules of court and Judicial Council forms.

   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 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 include revisions to forms that contain dollar figures based on statutory criteria that the Judicial Council is mandated to adjust on a regular basis, including Update Judicial Council forms, including *Financial Declaration – Juvenile Dependency* (form JV-132) and *Joint Petition for Summary Dissolution* (form FL-800), as well as correcting the numbering on the *Findings and Orders after Nonminor Dependent Status Review Hearing* (form JV-462).

   Status/Timeline: Ongoing.

   Fiscal Impact/Staff Resources: CFCC Staff, Legal Services 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: None.

   AC Collaboration: None.

2. ***Project Title*:** Family Law: Revise forms FL-195 and FL-196 as needed to comply with changes in federal law.

   Priority: 1a

   Supported Strategic Plan Branch Goals:

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

Project Summary: Revise *Income Withholding for Support* (form FL-195) and *Income Withholding for Support - Instructions* (form FL-196) as appropriate to comply with changes made by the federal Office of Child Support Services, which periodically updates the federal Income Withholding Form and Instructions. Each state child support agency and tribes that operate child support programs established in accordance with title IV-D must use these forms without any changes.

Status/Timeline: Ongoing. Revisions will be presented in response to changes in federal regulations and effective date will depend on the content of those changes.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: DCSS.

AC Collaboration: None.

3. ***Project Title*:** Juvenile Law: Family First Prevention Services Act (FFPSA) implementation.

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: Monitor implementation of FFPSA, which reforms federal child welfare financing streams, title IV-E, and title IV-B of the Social Security Act, to provide services to families who are at risk of entering the child welfare system. California's title IV-E program was audited by the federal government in 2025, and we expect to receive implementations for the state's child welfare financing.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services staff, Governmental Affairs 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: California Department of Social Services (CDSS), Chief Probation Officers of California (CPOC), Child Welfare Directors Association.

AC Collaboration: None.

4. ***Project Title*:** Family Law: Access to visitation funding and legislative report.

   Priority: 1

   Supported Strategic Plan Branch Goals:

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

   Project Summary: Provide recommendations to the Judicial Council for allocation of funding pursuant to Family Code section 3204. Additionally, the committee will provide the council with the statutorily-mandated legislative report on the program due every other year. Under delegated authority, the committee will also reallocate funds every year as needed.

   Status/Timeline: Ongoing.

   Fiscal Impact/Staff Resources: CFCC Staff, Budget Services 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: None.

   AC Collaboration: TCBAC.

5. ***Project Title*:** Provide recommendations to Judicial Council on domestic violence issues.

   Priority: 1

   Supported Strategic Plan Branch Goals:

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

Project Summary: Provide recommendations to the Judicial Council on statewide judicial branch domestic violence issues in the area of family and juvenile law, including projects referred from the work of the Domestic Violence Practice and Procedure Task Force and the Violence Against Women Education Project.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services staff, and Criminal Justice Services (CJS) 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: None.

AC Collaboration: CSCAC, Criminal Law Advisory Committee (CLAC), and Tribal Court–State Court Forum.

6. ***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: Review and recommend positions on legislation related to family and juvenile law matters. 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: CFCC staff, Legal Services staff, and Governmental Affairs 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: California Legislature.

AC Collaboration: Legislation Committee.

7. ***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 affect issues within the advisory committee's purview and, where appropriate, propose to the council rules and forms or revisions to implement or align with the legislation.

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

Fiscal Impact/Staff Resources: CFCC staff, Legal Services staff, and Governmental Affairs 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: None.

AC Collaboration: As appropriate based on specific legislation.

8. ***Project Title*:** Family Law: Review approval of training providers under rules 5.210, 5.215, 5.225, 5.230, and 5.518.

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Consult with Judicial Council staff to approve education and training programs for court-connected mediators, child custody recommending counselors, and evaluators.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC 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: None.

AC Collaboration: None.

9. ***Project Title***: Juvenile Law: Intercounty transfers.

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Review requests under rule 5.610(h) to approve local collaborative agreements for alternative juvenile court transfer forms in lieu of using *Juvenile Court Transfer-Out Orders* (form JV-550). This project originated from the Judicial Council Delegations to the Administrative Director of the Courts (October 25, 2013, Item 99), who then delegated the project to the committee. The committee will review any such requests that are presented during the upcoming year.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC 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: None.

AC Collaboration: None.

10. ***Project Title*:** Juvenile Law: Child and Family Services Reviews (CFSR) process.

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: California's Court Improvement Program (CIP) is a federal grant from the Administration for Children and Families, Children's Bureau, that supports the state's highest court in improving juvenile court processes and legal representation in child welfare cases. California participates in the federal Child and Family Services Review (CFSR), and Round 4 began in 2022 with a directive requiring judicial branch involvement, including the appointment of a Legal Judicial Specialist and development of Program Improvement Plan (PIP) strategies. The Chief Justice designated the cochairs of the Family and Juvenile Law Advisory Committee to serve as her representatives. The federal government uses the CFSR to determine whether the state's child welfare system meets required safety, permanency, and well-being outcomes, and California's PIP, approved in June 2025, outlines the actions and benchmarks the state must meet within eighteen months to achieve substantial conformity and avoid federal funding penalties. Staff supports the many activities identified through the CFSR and PIP that have been incorporated into California's CIP Strategic Plan.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC 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: CDSS, CPOC, Child Welfare Directors Association.

AC Collaboration: None.

11. ***Project Title*****:** Juvenile Law: Implement reauthorization of title IV-B funding for Court Improvement Programs.

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider necessary actions to support implementation of the Supporting America's Children and Families Act (H.R. 9076, 118th Cong., 2d Sess. (2025)) which reauthorized title IV-B funding for Court Improvement Programs effective October 1, 2025. Necessary actions may include collaborating with the CDSS to develop and implement federal compliance strategies on topics such as ensuring children, parents, and guardians are informed about the availability of independent legal representation, preventing family separation based on poverty, improving Indian Child Welfare Act compliance, providing title IV-B services up to the age of 26, and providing technical assistance and education to courts to support implementation and increase compliance.

Status/Timeline: Ongoing. Federal guidance continues to be published on the reauthorization and how states are required to implement the changed provisions.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services staff, Governmental Affairs 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: CDSS, CPOC, Child Welfare Directors Association.

AC Collaboration: Court Executives Advisory Committee (CEAC), Trial Court Presiding Judges Advisory Committee (TCPJAC).

12. ***Project Title*****:** Family Law: Certification of statewide uniform guideline support calculators.

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Review requests under rule 5.275 and Family Code section 3830 from developers to certify new guideline support calculators for use in the superior courts.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC 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: None.

AC Collaboration: None.

13. ***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: Through the committee's Protective Order Working Group, 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: CFCC staff, Legal Services staff, and CJS 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 CSCAC and CLAC, as appropriate.

14. ***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.

15. ***Project Title*****:** Update Judicial Council forms within the committee's purview that have 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 Judicial Council's Rules Committee, through its former chair, Justice Harry E. Hull, Jr., asked all advisory committees it oversees to identify forms within the committees' purview that have gender identity questions or terms, and to indicate on each committee's annual agenda whether the committee proposed to revise forms to address gender (1) as revisions are needed in the future due to legislative or other changes, or (2) as a set of form revisions solely to address the gender question or term. This task followed from legislation. In 2018 the Legislature adopted a resolution to direct state agencies to use gender-neutral drafting in their materials. Assem. Con. Res. No. 260 (Low; Stats. 2018, res. ch. 190). As such, the committee will revise forms containing gendered terms or gender identity questions to remove gendered language and conform to legislative changes providing for nonbinary gender identity as the forms are being revised for other reasons.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: None.

16. ***Project Title*****:** Improve usability of Judicial Council forms within the committee's purview.

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: Consider form revisions to improve useability when developing new Judicial Council forms or recommending revisions to forms.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: None.

17. ***Project Title*****:** Serve as subject matter resource.

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 on family and juvenile law for other advisory bodies to avoid duplication of effort and contribute to the development of recommendations for the Judicial Council. Such efforts may include providing family and juvenile law expertise and review to working groups, task forces, advisory committees, and subcommittees as needed.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, CJS staff, Legal Services staff, and Governmental Affairs 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: To be determined depending on the subject matter and scope of the issues raised.

AC Collaboration: Respective advisory bodies.

18. ***Project Title*:** Family Law: AB 1058 child support program funding.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Continue to monitor the implementation of the current workload-based funding methodology for the AB 1058 Child Support Commissioner Program and population-based funding methodology for the Family Law Facilitator Program, including its impact on smaller courts and the overall performance of the program as federally mandated. As directed by the AB 1058 Funding Allocation Joint Subcommittee of the Judicial Council in 2019, the committee will continue to review the implementation of the AB 1058 funding methodology, including its impact on the performance of the program as federally mandated and make recommendations concerning allocation of federal title IV-D drawdown funds.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Budget Services 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: DCSS.

AC Collaboration: TCBAC, as needed.

19. ***Project Title***: Advise on Judicial Branch education for family and juvenile law.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Contribute to planning efforts in support of family and juvenile law judicial branch education.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, Center for Judicial Education and Resources (CJER) 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: None.

AC Collaboration: CJER Advisory Committee.

20. ***Project Title*****:** Juvenile Law: Advise on distribution of federal title IV-E reimbursement for dependency counsel.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Beginning in 2019, a change in the federal Child Welfare Policy Manual permits attorneys who provide dependency representation to claim reimbursement for specified legal activities. The Budget Act of 2026 includes $66 million to support this federal reimbursement. The ongoing funding to support federal reimbursement was first included in the Budget Act of 2019. In July 2019, the Judicial Council authorized distribution of these funds to court appointed dependency counsel statewide. The committee will continue to review the implementation of federal title IV-E reimbursement for dependency counsel as outlined in its 2019 report to the Judicial Council, *Juvenile Law: Distribution of Federal Title IV-E Reimbursement for Dependency Counsel*.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: CFCC staff, Legal Services staff, Branch Accounting and Procurement (BAP) 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: TCPJAC, CEAC, CDSS, Child Welfare Directors Association, Court-appointed Counsel in Dependency Providers.

AC Collaboration: TCPJAC and the Court Executives Advisory Committee.

21. ***Project Title*****:** Juvenile Law: Blue Ribbon Commission (BRC) on children in foster care recommendations.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations from the BRC. Consider ongoing process to monitor issues raised in the *Blue Ribbon Commission on Children in Foster Care: Final Report* (August 2014).

Status/Timeline: Ongoing, as needed.

Fiscal Impact/Staff Resources: CFCC 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: None.

AC Collaboration: None.

22. *Project Title*: Family Law: Elkins Family Law Task Force recommendations.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations from the Elkins Family Law Task Force. Consider ongoing process to monitor issues raised in the *Elkins Family Law Implementation Task Force: Final Report and Recommendations* (April 2010).

Status/Timeline: Ongoing, as needed.

Fiscal Impact/Staff Resources: None.

☐ 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: None.

AC Collaboration: None.

23. *Project Title*: Mental Health Law: Mental Health Issues Implementation Task Force referrals.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations and consider ongoing process to monitor issues raised in the *Mental Health Issues Implementation Task Force: Final Report* (December 2015). Coordinate with Judicial Council staff and other advisory committees on developing and implementing recommendations to improve access and procedures in mental health proceedings, including review and consideration of implementation of select recommendations referred by the Judicial Council following the task force's final report to the council.

Status/Timeline: Ongoing, as needed.

Fiscal Impact/Staff Resources: CFCC staff, CJS staff, and Legal Services 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: None.

AC Collaboration: Collaborative Justice Courts Advisory Committee (CJCAC) and CLAC.

24. *Project Title*: Probate Guardianship: Court coordination and allegations of child abuse and neglect.

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: Continue to work collaboratively with the Probate and Mental Health Advisory Committee (PMHAC) as well as the Advisory Committee on Providing Access and Fairness (PAF) on issues related to court coordination and allegations of child abuse and neglect in guardianship cases.

Status/Timeline: Ongoing, as needed.

Fiscal Impact/Staff Resources: CFCC 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: None.

AC Collaboration: PMHAC, PAF.

25. ***Project Title*****:** Access to the California Courts Protective Order Registry (CCPOR).

Priority: 2

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 to examine the need for statewide guidance and policies on access to the CCPOR, a statewide protective order registry, which was started in 2008 when the Judicial Council approved the recommendation by the Domestic Violence Practice and Procedure Task Force to create it. The committee may review the governance of and the policies and procedures for CCPOR.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: CFCC staff, CJS staff, and Legal Services 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: California DOJ.

AC Collaboration: CSCAC, CLAC, as appropriate.

26. ***Project Title*****:** Juvenile Law: Judicial Council–sponsored legislation to replace "juvenile delinquency".

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: As time and resources permit, the committee will draft proposed legislation to update references to "juvenile delinquency" across relevant California statutes, including the Welfare and Institutions Code, Education Code, Family Code, Government Code, Health and Safety Code, Penal Code, Probate Code, and Public Resources Code, to "juvenile justice" or other appropriate terminology. This proposal would also address references to "delinquent acts," "delinquent history," "delinquent behaviors," and similar phrases in the codes. These different phrases will require careful consideration and possibly the development of new language to redefine these concepts under the umbrella of "juvenile justice" or another appropriate term.

Status/Timeline: Legislative research and drafting continue to be conducted during FY 2026–2027. Proposed legislation to be circulated for public comment in 2027 and finalized and presented to the Legislature for consideration in FY 2027–2028, with an anticipated effective date of January 1, 2029.

Fiscal Impact/Staff Resources: CFCC staff, Legal Services 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: Family and juvenile law related stakeholders as well as all court executives and presiding judges.

AC Collaboration: Legislation Committee, CLAC.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. **Implementation of Legislative Changes from the 2025 Legislative Session (effective January 1, 2027) requiring rule or form changes.**

   Based on legislation that impacted family and juvenile law, the committee recommended and the council approved the following new and updated rules and forms, effective January 1, 2027:

   a. Family Law: Adoption Order.
   Revised form ADOPT-215 to implement Senate Bill 450 (Stats. 2025, ch. 757).
   b. Family Law: Certification, Review, and Use of Computer Software to Assist in Determining Support.
   Amended California Rules of Court, rule 5.275 of the California Rules of Court to ensure the continued availability and accuracy of software used to assist courts in determining support.
   c. Juvenile Law: Guidelines for Counsel Collections Program.
   Amended California Rules of Court, Appendix F, Guidelines for the Juvenile Dependency Counsel Collections Program, to remove references to a superseded method of calculating the court cost of providing dependency-related legal services, reformat the appendix to conform more closely to the style of the rules of court, replace gender-specific language with gender-neutral terms, and make additional technical and stylistic changes.
   d. Juvenile Law: Updating Access Rules for Juvenile Case Files Under Senate Bill 413.
   Amended California Rules of Court, rule 5.552, approved form CIV-180/JV-568, and adopted form JV-566 to implement Senate Bill 413's (Stats. 2025, ch. 221) expanded access to juvenile case files for civil attorneys, including new requirements and deadlines for staff to return and destroy records after the civil case closes.
   e. Juvenile Law: Implementation of Assembly Bill 383 Regarding Firearms Relinquishment.
   Revised and retitled form CR-210 to implement Assembly Bill 383 (Stats. 2025, ch. 362).
   f. Juvenile Law: Physical Transfer of a Party in Custody.
   Amended California Rules of Court, rule 5.770, revised form JV-710 and approved form JV-711 to implement Senate Bill 823 (Stats. 2020, ch. 337).
   g. Juvenile Law: Transfer of Nonminor Dependents.
   Amended California Rules of Court, rule 5.613, approved form JV-549, and revised forms JV-548 and JV-552 to implement Assembly Bill 890 (Stats. 2025, ch. 281).
   h. Family Law: Domestic Violence Training Standards for Court-Appointed Child Custody Investigators and Evaluators.
   Amended California Rules of Court, rules 5.215 and 5.230 to implement Assembly Bill 1974 (Stats. 2024, ch. 303) and make additional clarifying, formatting and technical changes.
   i. Juvenile Law: Record Sealing Forms.
   Amended California Rules of Court, rules 5.830, 5.840, and 5.860, approved forms JV-920 and JV-921, and revised forms JV-591, JV-595-INFO, and JV-596-INFO to implement Assembly Bill 1877 (Stats. 2024, ch. 811).

j. Juvenile Law: Probation Time Limits.
Revised forms JV-624, JV-625, and JV-665 to implement new requirements for time limits on juvenile probation under Assembly Bill 1376 (Stats. 2025, ch. 575).

k. Juvenile Law: Incarcerated Parents and Nonminor Dependents.
Amended California Rules of Court, rules 5.530 and 5.900, and revised forms JV-450 and JV-451 to implement Assembly Bill 651 (Stats. 2025, ch. 274), which amended Penal Code section 2625 to require courts to give notice to incarcerated parents, including wards in Secure Youth Treatment Facilities (SYTFs), and allow them to attend specified dependency hearings.

l. Family Law: Financial Disclosure Forms.
Adopted forms FL-150(A), FL-150(C), FL-150(D) and FL-150(F), approved forms FL-150(B) and FL-150(E), revised forms FL-150, FL-155, and FL-397, and revoked form DV-570 to implement H.R. No. 1, 119th Cong., 1st Sess. (2025) and to respond to identified concerns regarding financial disclosure forms used in family law cases.

m. Family Law: Rules and Forms to Implement Assembly Bill 747 and Senate Bill 85.
Amended rule 5.72, adopted form DV-205, approved forms DV-217 and FL-116, and revised forms DV-116, DV-117, DV-205-INFO, FL-115, FL-980, FL-982, FL-985, and SUR-115 to implement new requirements for service of process under Assembly Bill 747 (Stats. 2025, ch. 563) and Senate Bill 85 (Stats. 2025, ch. 403).

n. Family Law: Revisions to Summons Forms to Implement Assembly Bill 1297 and Enhance Consistency.
Revised forms FL-110, FL-210, FL-710, and SUR-110 to implement new requirements for summons forms under Assembly Bill 1297 (Stats. 2025, ch. 48).

o. Protective Orders: Changes to Forms DV-310 and DV-300-INFO.
Revised forms DV-300-INFO and DV-310 to respond to identified concerns.

p. Civil Practice and Procedure: Statement of Decision Rules and Forms to Implement Assembly Bill 515.
Amended rules 3.1590 and 3.1591and approved forms CIV-175, CIV-175-INFO, CIV-176, and CIV-177, to implement Assembly Bill 515 (Stats. 2025, ch. 559).

2. Provided oversight to implementation of new program to expand funding for court appointed counsel in dependency proceedings.

3. Provided technical assistance and position recommendations on family and juvenile related proposed legislation via numerous legislative review meetings.

4. Approved list of training providers for court connected child custody mediators, recommending counselors, and evaluators as directed by the Judicial Council.

5. AB 1058 Funding related activities: the committee continued to make recommendations to the Judicial Council for ongoing funding allocations based on the approved funding methodologies for the program.

6. Under delegated authority, approved a midyear reallocation of unused funds the Access to Visitation Grant Program.

7. Provided recommendations to the Judicial Council for allocation of the $2.713 million in funding for CASA programs based on the approved methodology. Submitted and published a legislatively-mandated report entitled *Report on California Court Appointed Special Advocate Association Funding Allocations and Program Development: Year Three*.
8. Provided support for the activities and meetings of the Violence Against Women Education Project (VAWEP).
9. Provided recommendations to the Judicial Council for allocation and distribution of $9.1 million to six trial courts for Cycle 3 Firearm Relinquishment Grant awards for 2024–25 through 2025–26.

Probate and Mental Health Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Aaron W. Heisler, Commissioner, Superior Court of California, County of Orange
Lead Staff: Julia Kaufman, Attorney, Center for Families, Children & the Courts

Advisory Body's Charge/Membership:

Rule 10.44(a) of the California Rules of Court states the charge of the Probate and Mental Health Advisory Committee, which is to make recommendations to the Judicial 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 advisory committee.

Rule 10.44(c) sets forth the membership categories of the advisory committee. The Probate and Mental Health Advisory Committee currently has 17 members. The current committee roster is available on the committee's webpage.

Subgroups of the Advisory Body:

1. Legislation Subcommittee
2. Conservatorship Subcommittee
3. Guardianship Subcommittee
4. Mental Health Subcommittee

Advisory Body and Subgroup Meetings Planned for 2026–2027:

- The committee plans to meet remotely once a month. The committee currently meets on the fourth Thursday of every month.
- In-person committee meeting, one time, date to be determined.
- The Legislative Subcommittee plans to meet remotely once a month from February through August during the 2027 legislative session.
- Additional meetings of the committee and subcommittees will be set as workload dictates.

☐ 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*: Revise forms used in decedent's estate proceedings under the Probate Code (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will develop a recommendation for revisions to the forms used in decedent's estate proceedings, including, but not limited to, *Petition for Probate* (DE-111) and *Order for Probate* (DE-140), in response to multiple requests and comments from members of the trial courts and the public. These forms have not been updated since 2017 and 1998, respectively. The current form does not contain the option that a will has already been admitted to probate, as allowed by various sections in the Probate Code (see, for example, section 8522). In addition, while the petition form includes allegations regarding a lost will, the order does not comply with the requirements of Probate Code section 8223 and needs to be updated for more explicit compliance with existing law. The recommendation may also revise other forms used in the probate process to correct errors and maintain continuity within the form suite. The recommendation will improve legal accuracy, simplify and reorganize the forms to make them more user-friendly for self-represented litigants, and respond to concerns raised by courts and attorneys.

Status/Timeline: The committee anticipates this to be a two-year project, with an invitation to comment planned for spring of 2028 and with an anticipated effective date of January 1, 2029.

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 staff, Legal Services staff, and EGG 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, public

AC Collaboration: n/a

2. *Project Title*: Rules and forms to clarify and streamline the procedural requirements for a court-supervised sale of real property by a fiduciary (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will develop a recommendation for new and amended rules of court and new and revised forms to clarify the requirements that apply to a court-supervised sale of real property by a fiduciary, simplify the process for court approval of the sale, and promote statewide uniformity. The proposal is anticipated to include amending existing rules 7.52 and 7.206 and revising existing form DE-260 (*Report of Sale and Petition for Order Confirming Sale of Real Property*) and form DE-265 (*Order Confirming Sale of Real Property*), with other forms used in the process to be revised as necessary. Form DE-265 does not include the option for the finding that the court is vacating the sale (as reported) and ordering a new sale, as required by Probate Code section 10303(c). The recommendation will also respond to concerns raised by judicial officers and attorneys by improving legal accuracy, reducing uncertainty, and creating a more efficient and user-friendly process for self-represented fiduciaries and interested persons.

Status/Timeline: Invitation to comment planned for the spring 2027 cycle, with changes anticipated to take effect January 1, 2028.

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 staff, Legal Services staff, and EGG 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, public

AC Collaboration: n/a

3. *Project Title*: Rules and forms to implement legislation updating and clarifying the application of the Indian Child Welfare Act to probate guardianship proceedings (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will collaborate with Tribal Court–State Court Forum to recommend revisions to rules and forms to implement Assembly Bill 1824 (Stats. 2026, ch. 454), which clarifies application of the requirements under the Indian Child Welfare Act in probate guardianship and conservatorship proceedings that could result in the out-of-home placement of an Indian child.

Status/Timeline: Rules and forms are anticipated to circulate in the spring 2027 cycle and to take effect January 1, 2028.

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.

☐ 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, tribal courts, public

AC Collaboration: Tribal Court–State Court Forum

4. ***Project Title*: Amend rules of court to clarify confidentiality of probate conservatorship forms (new)**

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will consider amending rules of court to clarify that courts must keep *Confidential Capacity Assessment and Declaration—Probate Conservatorship* (GC-335) and *Everyday Activities Attachment to Confidential Capacity Assessment and Declaration—Probate Conservatorship* (GC-335A) confidential when filed in conservatorship proceedings and to specify whom the court may allow to inspect them to align with Probate Code section 1821(a)(5), which designates portions of the information filed in conservatorship proceedings as confidential and limits distribution of that information. The amendment is intended to protect the privacy of proposed conservatees and current conservatees by clearly notifying courts that this information is confidential.

Status/Timeline: Amended rules are anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 staff, Legal Services staff, and EGG 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, persons interested in conservatorship proceedings

AC Collaboration: n/a

5. *Project Title*: Update guardianship forms, including letters and status-report form, to conform to law and clarify requirements (new)

Priority: 1c

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will develop a recommendation to revise forms used in the guardianship proceedings to provide additional clarity regarding the use and effect of the forms. The *Letters of Guardianship* (GC-250) do not explicitly state that the named guardian of the person has the care, custody, and control of the ward. The absence from the letters of an express indication that the guardian has care, custody, and control of the ward has led to issues with governments in countries and, perhaps states, bordering California questioning the existence of the custodial relationship, risking separation of the ward from their caregiver and possible criminal proceedings against the duly appointed guardian. This has also led to confusion with our justice partners, such as law enforcement and school districts, in enforcing the terms of custody or providing the necessary services and support. The proposal will include revising GC-250 to indicate that a guardian of the person has care, custody, control, and education rights of the ward and update the language regarding the termination date, as well as other changes as may be suggested. In addition, the proposal will revise *Confidential Guardianship Status Report* (GC-251) to reorganize and simplify the language to make the form more user-friendly and easier for self-represented litigants to complete. Courts receiving the status report have indicated that the filed forms have often been incomplete and do not provide the necessary information for judicial review, requiring an increase in court resources expended to obtain the information that would be provided if the forms were completed properly. The location of the instruction and the advisement on the form has led to courts lacking information necessary for them to perform their duties of ensuring the welfare of the ward and supervising the guardian. Updating the instructions, reorganizing the form, and using more plain-language descriptions will address this issue.

Status/Timeline: Revised forms are anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 staff, Legal Services staff, and EGG 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, appointed guardians, persons interested in guardianships

AC Collaboration: n/a

6. ***Project Title*: Clarify permitted use of Judicial Council forms in proceedings under the Probate Code (new)**

Priority: 2b

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will develop a recommendation to amend California Rules of Court, rule 7.104 to bring it into conformity with common practices in probate proceedings and make the process of submitting an amendment to a pleading or a supplement to a pleading more accessible to self-represented litigants. This proposal is being made due to recent updates to forms and the implementation of several new forms that refer to the use of attachments in pleadings. It is anticipated to include amending the rule to more clearly state that specific types of Judicial Council forms, such as attachments or declarations, may be used for these purposes when not otherwise stated.

Status/Timeline: Amended rule is anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 staff, Legal Services staff, and EGG 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, public

AC Collaboration: n/a

7. *Project Title*: Review and make recommendation for submission of report to Legislature on court effectiveness in conservatorship cases (one-time)

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Probate Code section 1458 (added by Assembly Bill 1194; Stats. 2021, ch. 417, § 4 and amended by Assembly Bill 1756; Stats 2023, ch. 47, §57 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 that serve to protect the legal rights of conservatees, and staffing needs to meet case processing requirements." Council staff, working with a contractor, have analyzed the data, and prepared a draft report for the committee's consideration. The committee will review the report before making a recommendation to the Judicial Council for submission of the report to the Legislature.

Status/Timeline: Report to Legislature due January 1, 2027.

Fiscal Impact/Staff Resources: 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.

☐ 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: Legislature, trial courts, persons interested in conservatorship proceedings.

AC Collaboration: n/a

8. *Project Title*: Revise *Handbook for Conservators* (one-time)

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: The *Handbook* fulfills the Judicial Council's duties under Probate Code section 1835 to develop an information package, make the package available to the courts, and periodically update the package when changes to the law warrant. (Prob. Code, § 1835(c), (e).) The courts may in turn 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 *Handbook* in 1991 to serve as the information package required by section 1835; the first edition was published in 1992. The second edition was published in 2002, and the third edition was published in 2016. Changes to the law since that edition and a shift to primarily online use require another round of updates to both content and format of the *Handbook*, including improved accessibility. The committee plans to consider options for improving the *Handbook*'s accessibility, including possible translation of the *Handbook* into Spanish and additional languages or promotion of low-cost alternatives to formal translation.

Status/Timeline: The draft handbook circulated for public comment in September 2026. The committee anticipates presenting the revised handbook to the Judicial Council in December to request approval, effective January 1, 2027.

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.

☐ 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, conservators, public

AC Collaboration: n/a

Ongoing Projects and Activities

1. ***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: 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).

   Status/Timeline: Ongoing

   Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC 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: TBD, depending on subject matter and scope of legislation.

   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

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 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.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC 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: TBD

AC Collaboration: TBD; depending on subject matter and scope of legislation.

3. ***Project Title*: Miscellaneous technical changes to 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: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria in rule 10.22(d)(2): "a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy…." These include revisions to forms containing dollar amounts that the Judicial Council is mandated to adjust on a regular basis based on statutory criteria and updates to form numbers in current forms to reflect recent additions or updates.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, CFCC 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

4. ***Project Title*: Update rules and forms to use gender-neutral language.**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: As rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gender-specific terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, Legal Services 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: TBD, depending on the subject matter of the relevant rules and forms

AC Collaboration: TBD.

5. ***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 replacing items to improve usability 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: Court and court users; all draft proposals will circulate for public comment.

AC Collaboration: As appropriate, depending on the affected forms.

6. ***Project Title*: Review suggestions**

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 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, as appropriate.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Indeterminate fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, Governmental Affairs staff, Legal Services staff, CFCC staff, and other staff TBD.

☐ 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: TBD, depending on subject matter and scope of suggestion.

AC Collaboration: TBD

7. ***Project Title*: Monitor developments in California guardianship law related to immigrant children**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Continue to monitor the implementation, in probate guardianship proceedings, of Code of Civil Procedure section 155, Probate Code section 1510.1, and other statutes and case law concerning state judicial proceedings related to (proposed) wards' federal petitions for Special Immigrant Juvenile classification. If necessary, develop recommendations to amend rules of court or revise forms.

Status/Timeline: Ongoing. Any proposal for new or amended rules of court or new or revised forms would circulate for public comment.

Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs staff, Legal Services staff, and CFCC 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: TBD

AC Collaboration: Family Law and Juvenile Committee, others TBD

8. ***Project Title*: Provide subject-matter expertise**

Priority: 1

Supported Strategic Plan Branch Goals:

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

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.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, Criminal Justice services staff, and CFCC 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: TBD, depending on subject matter and scope of issues raised.

AC Collaboration: TBD, depending on subject matter and scope of issues raised.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. Recommended amended rules of court and new and revised Judicial Council forms to implement amendments to the CARE Act (Senate Bill 27; Stats. 2025, ch. 528). The recommendation included revising five forms, approving two forms, amending four rules of court, and repealing one rule of court, effective July 1, 2026.
2. Recommended revisions to three existing conservatorship forms and recommended seven new forms for use to appoint a conservator to conform to changes enacted by Assembly Bill 1663 (Stats. 2022, ch. 894) and to make the forms more user-friendly for self-represented litigants, effective July 1, 2027.
3. Recommended revising the form used to inform conservators of their duties by updating it, dividing it into two separate forms—one form to state and explain the duties and the other form for the conservator to use to file a required acknowledgment of receipt with the court—and amending the rules of court to reflect the change, effective January 1, 2027.
4. Recommended new and revised Judicial Council forms and amendments to rules of court to implement changes to guardianship proceedings as provided in Assembly Bill 495 (Stats. 2025, ch. 664), effective January 1, 2027. The recommendation included amending one rule, adopting one form, approving one form, and revising eight forms to bring them into conformity with the law, update cross-references, and simplify the forms' language and structure so they will be easier to use.
5. Drafted proposed revisions and updates to the Judicial Council's *Handbook for Conservators* and posted a draft for public review and comment, with an anticipated submission of the *Handbook* to the council for consideration in December 2026 and, if approved, an effective January 1, 2027.
6. Collated and reviewed the data collected for the report to the Legislature regarding court effectiveness in conservatorship proceedings as required by Assembly Bill 1194 (Stats. 2021, ch. 417). The committee will continue its work on the report in 2026–2027 to make a recommendation to the Judicial Council for the report's submission to the Legislature by January 1, 2027.
7. Jointly with the Civil and Small Claims Advisory Committee, recommended amending seven rules and revising twenty-two forms used in the fee waiver process to exclude certain compensation as directed by Senate Bill 54 (Stats. 2025, ch. 646), update the forms, correct several misapplications of the law, simplify the forms for use by self-represented litigants, and make additional improvements, effective January 1, 2027.
8. Coordinated with the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee to recommend revisions to proof of service forms to implement the changes enacted by Assembly Bill 747 (Stats. 2025, ch. 563). The recommendation of this committee included adopting two forms, revising three forms, revising and renumbering two forms, and revoking two forms for use in probate proceedings effective January 1, 2027.

Traffic Advisory Committee
Annual Agenda [Draft]—2026–2027
Approved by Rules Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Maria Lucy Armendariz, Judge, Superior Court of California, County of Los Angeles
Lead Staff: Jamie Schechter, Attorney, Criminal Justice Services

Advisory Body's Charge/Membership:

Rule 10.54 of the California Rules of Court states the charge of the Traffic Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in the area of traffic procedure, practice, and case management and in other areas as set forth in the fish and game, boating, forestry, public utilities, parks and recreation, and business licensing bail schedules.

Rule 10.54 of the California Rules of Court also sets forth the membership categories of the committee. The Traffic Advisory Committee currently has 13 members. The current committee roster is available on the committee's webpage.

Subgroups of the Advisory Body:

1. None

Advisory Body and Subgroup Meetings Planned for 2026—2027:

- In person meeting October 13, 2026
- Bi-weekly telephone conferences as needed throughout the year.

☐ 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*: Potential Adoption of Trial By Written Declaration Forms for MyCitations Courts (one-time)**

   Priority: 1c

   Supported Strategic Plan Branch Goals:

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

   Project Summary: Consider recommending new alternative trial by declaration forms specifically for courts that have opted to use the MyCitations trial by declaration feature. MyCitations is an online program developed by the Judicial Council that allows a litigant to request an ability-to-pay determination for infraction fines and fees without having to appear in court. It includes an optional trial by declaration feature. For courts that use this feature, the trial by declaration process differs from the process reflected in forms TR-205, TR-215, TR-220, TR-225, and TR-235. Specifically, in MyCitations courts that elect to use the trial by declaration feature, the litigant is not required to pay bail up front (unless the court makes express findings otherwise) and the litigant does not have the right to a trial de novo. (Gov. Code, § 68645.4(a)(2), (4).) Courts that use the MyCitations trial by declaration feature need to follow the same procedure for their paper process. (Gov. Code, § 68645.4(b).) A court may adopt local rules or forms to implement this procedure, unless the Judicial Council adopts rules and forms for the purpose of the statute. (Gov. Code, § 68645.4(c).) This committee recommended revised trial by written declaration forms TR-205, TR-215, TR-220, TR-225, and TR-235 to be effective January 1, 2027. For consistency and standardization, the committee proposes considering alternate forms for the trial by declaration process for MyCitations courts.

   Status/Timeline: Invitation to comment planned for Spring 2027, with an anticipated effective date of January 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 courts, other justice system partners, and any proposal will be circulated for public comment.

   AC Collaboration: N/A

2. ***Project Title*: Support Statewide Expansion of MyCitations and eCitations**

   Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: The Court Executives Advisory Committee through a working group will explore the implementation of electronic citations (eCitations) for all trial courts and the expansion of MyCitations as a single source of online traffic adjudication options for the public. As the expansion effort moves forward, this committee may assist as a subject matter resource.

Status/Timeline: TBD.

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 law enforcement agencies.

AC Collaboration: Court Executive Advisory Committee, Information Technology Advisory Committee.

Ongoing Projects and Activities

1. ***Project Title*: 2027 Bail Schedules Revision**

Priority: 1a

Supported Strategic Plan Branch Goals:

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

Project Summary: The Traffic Advisory Committee is required to revise and update the Uniform Bail and Penalty Schedules annually to conform with new laws, as required by Penal Code section 1269b and California Rule of Court 4.102.

Status/Timeline: Anticipated circulation for comment in October 2026 and to go to the Judicial Council in December with a January 2027 effective date.

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: Proposed schedules will be circulated for public comment.

AC Collaboration: N/A

2. ***Project Title*: Review Pending and 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 pending and enacted legislation that may impact traffic court administration. Provide subject matter expertise on legislation, including fiscal impacts for the courts. Review enacted legislation to determine the need for rules and forms changes to comply with legislation or other directives.

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: N/A

AC Collaboration: N/A

3. ***Project Title*: Traffic Bench Officer and Temporary Judge Training**

Priority: 1

Supported Strategic Plan Branch Goals:

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

Project Summary: Provide support as requested by the Center for Judicial Education and Research (CJER) with development of traffic training programs and materials for bench officers and temporary judges assigned to traffic proceedings.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: Committee staff; CJER 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: CJER Governing Committee.

4. ***Project Title*: Gender neutrality in 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 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.

Status/Timeline: Ongoing

Fiscal Impact/Staff 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: None.

AC Collaboration: None.

5. ***Project Title*: Miscellaneous technical changes to rules and forms**

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 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...".

Status/Timeline: Ongoing.

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: None.

AC Collaboration: None.

6. ***Project Title*: Explore Options to Improve Driving Under the Influence (DUI) Enforcement on Tribal Lands**

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: The Tribal Court-State Court Forum (Forum) hosted an event on September 19, 2025, focused on identifying and addressing barriers to the recognition and enforcement of tribal court orders of various kinds. At the event there was a session devoted to the issues of road safety and traffic in tribal communities (particularly for driving under the influence violations), the cross-jurisdictional issues and challenges that arise in these cases, and possible solutions to those issues. As a result, the Forum formed the Ad Hoc Work Group on DUIs on Tribal Lands. The Ad Hoc Work Group on DUIs on Tribal Lands continues to explore solutions. As this work moves forward, this committee may assist as a subject matter resource.

Status/Timeline: TBD.

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: Tribal courts, state courts, law enforcement agencies, Department of Motor Vehicles.

AC Collaboration: Tribal Court-State Court Forum (Forum), Criminal Law Advisory Committee.

7. ***Project Title*: Provide subject matter expertise for other advisory committees**

Priority: 2

Supported Strategic Plan Branch Goals:

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

Project Summary: The committee will provide subject matter expertise for the Judicial Council and other advisory committees working on proposals involving traffic law and procedure in addition to assisting the Tribal Court-State Court Forum and the Court Executives Advisory Committee.

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: None.

AC Collaboration: To be determined.

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.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. The committee recommended updates to the Uniform Bail and Penalties Schedule to be consistent with 2024–2025 legislation. The updated bail schedule was adopted by the Judicial Council at its December 12, 2025, meeting.
2. The committee provided Government Affairs office and the council's Legislation Committee subject matter expertise on pending traffic bills, including operational and fiscal impacts of proposed legislation, ongoing.
3. The committee recommended updates to the Trial by Written Declaration forms. The updates were approved by the Judicial Council at its October 16, 2026, meeting.