

**SUPERIOR COURT
OF
CALIFORNIA
COUNTY OF SOLANO**



LOCAL COURT RULES

**Superior Court of California
County of Solano**

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Brian Taylor, Court Executive Officer, is the official publisher of the local rules for the Superior Court of California County of Solano. Comments or suggestions concerning the local rules may be sent to the court at CourtOutreach@solano.courts.ca.gov.

The complete local rules, as well as individual rules and filing instructions for replacement pages, and local forms are available in .pdf format at the court's website, www.solano.courts.ca.gov, by clicking on the hyperlink marked "Local Rules of Court."

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**Superior Court of California
County of Solano**



**Superior Court of California
County of Solano**

Rule 1 – General Provisions

1.1 ADOPTION OF LOCAL RULES

The Superior Court of California, County of Solano hereby adopts these local rules pursuant to California Government Code section 68070 and Code of Civil Procedure sections 575.1 and 575.2. Unless otherwise stated in an individual rule, the term “court” as used in these local rules shall mean the Superior Court of California, County of Solano.

(Rule 1.1 amended effective January 1, 2010; adopted effective January 1, 1998.)

1.2 DIVISIONS OF THE COURT; ASSIGNMENT OF SUPERVISING JUDGES

The court shall be divided into five judicial divisions: the Criminal Division, the Civil Division, the Family Division, the Juvenile Division, and the Appellate Division. The court’s Presiding Judge shall appoint the presiding judge of the Juvenile Division and the supervising judges of all other divisions.

(Rule 1.2 amended effective July 1, 2014; adopted effective January 1, 1998; previously amended effective January 1, 2010.)

1.3 DIRECT CALENDARING

All matters pending in the court on January 1, 1998, or filed after January 1, 1998, shall be directly calendared to be heard by one judge for all purposes. If the name of the judge is announced in open court, this announcement shall be deemed adequate and appropriate notice to the parties and attorneys present of the assignment for all purposes.

(Rule 1.3 amended and renumbered effective January 1, 2010; adopted as Rule 1.4 effective January 1, 1998.)

**Superior Court of California
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Rule 1 – General Provisions

1.4 REASSIGNMENT UPON DISQUALIFICATION OF JUDICIAL OFFICER OR FOR OTHER CAUSE

When a judicial officer is disqualified, either on a peremptory challenge, for cause, or by the judicial officer’s own determination, the matter shall be referred to the presiding judge for reassignment. The reassignment shall be made by the presiding judge or designee, or the supervising or presiding judge of the division, upon the delegation of that authority by the presiding judge, and shall be for all purposes. A matter reassigned to a judicial officer for any other reason shall likewise be for all purposes, unless otherwise ordered by the Presiding Judge or by the Supervising Judge of the division.

(Rule 1.4 amended effective January 1, 2012; adopted as Rule 1.6 effective January 1, 1998; amended and renumbered effective January 1, 2010.)

1.5 DIGITAL SIGNATURES

The use of digital signatures on documents filed with the Court is allowed, and shall have the same force and effect as the use of a manual signature, if it complies with all of the requirements of Government Code section 16.5(a)(1)-(5). No other form of electronic signatures will be accepted. A party who files a document containing a digital signature under this rule represents that the signer’s certificate or similar verification document is maintained in the party’s possession or control, and is subject to production upon request from the Court.

(Rule 1.5 adopted effective January 1, 2020)

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**Rule 2 – Criminal and Traffic Infraction Cases
PART ONE: Rules Applicable to Misdemeanors and Felonies**

2.1 APPLICATION OF RULES

The rules in Part One of Rule 2 apply to all felony and misdemeanor criminal cases pending on, or filed on or after, January 1, 1998.

(Rule 2.1 amended effective January 1, 2013; adopted effective January 1, 1998; previously amended effective January 1, 2010.)

2.2 DIRECT CALENDARING OF CRIMINAL CASES

When a criminal case is filed either by complaint or indictment, the matter shall be assigned, after arraignment, to one judicial officer for all purposes. All criminal cases shall be heard first in an arraignment department of the court and from that department the case shall be assigned to one of the judicial officers in the Criminal Division of the court and the parties shall be notified in open court and on the record of the name of the judicial officer so assigned. The assignment to the judicial officer shall be deemed for all purposes.

If the parties are not notified of the assignment to one judicial officer for all purposes in open court, then the Clerk of the Court, after a judicial officer is selected, shall send a written notification to all parties by first class mail and file in the court file a verification of mailing.

(Rule 2.2 amended effective January 1, 2013; adopted effective January 1, 1998; previously amended effective January 1, 2010.)

2.3 PROCEDURE

a. PETITIONS PER PENAL CODE SECTION 1203.4 AND 1203.4a

Any defendant wishing to file a petition for relief per Penal Code sections 1203.4 or 1203.4a and who wishes to have their costs waived shall file a completed financial declaration on a form designated by the court. The form shall be filed concurrently with the petition.

(Subd. (a) adopted effective January 1, 2013.)

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**Rule 2 – Criminal and Traffic Infraction Cases
PART ONE: Rules Applicable to Misdemeanors and Felonies**

b. ORDERS SHORTENING TIME

Regarding pretrial motions governed by Rule of Court 4.111, when good cause exists, the court may prescribe a shorter time for the service and filing of a notice of motion and supporting papers *sua sponte* or if the party seeking to shorten the time files an *Application for Ex Parte Order Shortening Time* with the court. A party filing an *Application for Ex Parte Order Shortening Time* must notify all parties no later than 10:00 a.m. the court day before the ex parte appearance, absent a showing of exceptional circumstances that justify a shorter time for notice. Notice may be given by telephone. The application shall be accompanied by an affidavit or declaration setting forth facts showing good cause for the order and showing that notice was given to each party of the ex parte hearing. The application shall also be accompanied by a proposed order, as well as by the notice of motion and supporting papers.

(Subd. (b) adopted effective July 1, 2014.)

(Rule 2.3 amended effective July 1, 2014; adopted effective January 1, 2013; prior Rule 2.3, adopted effective January 1, 1998, repealed effective January 1, 2013.)

2.4 DIVERSION

a. MENTAL HEALTH DIVERSION

The procedures and policies contained in the Mental Health Diversion Procedures and Policies in the Appendix to Rule 2 shall be followed for all mental health diversions in felony and misdemeanor matters.

(Rule 2.4 adopted effective July 1, 2019; former Rule 2.4 repealed effective January 1, 2013.)

2.5 – 2.49 [Reserved]

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**Rule 2 – Criminal and Traffic Infraction Cases
PART TWO: Felony Criminal Cases**

2.50 – 2.99 [Reserved]

**Superior Court of California
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**Rule 2 – Criminal and Traffic Infraction Cases
PART THREE: Misdemeanor Cases**

2.100 COMMUNITY SERVICE AND CONVERSION OF INFRACTION FINES

Pursuant to Penal Code Section 1209.5(a)(c)(2), the hourly rate applicable to community service (work program) fine conversions in Solano County shall be \$30.00 per hour for the calendar year 2022. Thereafter, the community service rate will be automatically adjusted to be two times the California minimum wage each time it increases in the future.

(Rule 2.100 adopted effective July 1, 2022.)

2.110 – 2.149 [Reserved]

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**Rule 2 – Criminal and Traffic Infraction Cases
PART FOUR: Traffic Infraction Cases**

2.150 TRIAL BY DECLARATION IN ABSENTIA (Veh. Code Section 40903)

a. **DEFINITION (VEH. CODE SECTION 40903)**

- (1) Any person who fails to appear as provided by law may be deemed to have elected to have a trial by written declaration upon any alleged infraction, as charged by the citing officer, involving a violation of this code or any local ordinance adopted pursuant to this code.
- (2) Notwithstanding Division 10 (commencing with Section 1200) of the Evidence Code, testimony and other relevant evidence may be introduced in the form of a notice to appear issued pursuant to Section 40500, a notice of parking violation issued pursuant to Section 40202, a notice of delinquent parking violation issued pursuant to Section 40206, a business record or receipt, a sworn declaration of the arresting officer, or a written statement or letter signed by the defendant.

b. **INITIAL ACTION – TRAFFIC INFRACTION**

Upon the court’s receipt of a citation by the issuing agency, the court will send out a Courtesy Notice advising the defendant of the court due date, the need to appear, and to post the bail amount.

c. **FAILURE TO RESPOND TO COURTESY NOTICE BEFORE DUE DATE**

If within seven (7) days of the original due date, the defendant fails to respond to the courtesy notice:

- (1) The Court will send out a Delinquent Notice for Failure to Appear (FTA).
- (2) The notice will include a warning message that the defendant has twenty (20) days to pay in full or set up a payment plan, otherwise the defendant will be convicted in absentia, and the case will be sent to collections.

d. **FAILURE TO RESPOND TO DELINQUENT NOTICE WITHIN TWENTY FIVE (25) DAYS OF THE DELINQUENT NOTICE DATE**

If the defendant fails to respond to the Delinquent Notice for Failure to Appear within twenty-five (25) days of the delinquent notice date:

- (1) The Court will generate a “Trial in Absentia” report capturing all Traffic

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PART FOUR: Traffic Infraction Cases**

Infraction cases that have a balance greater than zero, no future event date, and a docket entry that a Delinquent Notice was sent.

- (2) The report will be sent to the Judicial Officer to determine the appropriate course of action. Pursuant to Penal Code section 1214.1, the Judicial Officer may order a civil assessment of up to \$100.00.

e. COURT’S DECISION AFTER TRIAL IN ABSENTIA

Upon receiving the “trial in absentia” report, the judicial officer may in their discretion take any of the following actions to adjudicate each case:

- (1) Find the defendant not guilty. If the court finds the defendant not guilty, the case will be dismissed and closed.
- (2) Impose a civil assessment for the defendant’s failure to appear in court. If the Judicial Officer imposes a Civil Assessment for Failure to Appear, the Civil Assessment will be added to the unpaid bail and a corresponding notice (Failure to Appear Warning Notice) will be sent to the defendant. The warning notice will state that the defendant has twenty (20) days to contact the court or request the court dismiss the civil assessment otherwise the case will be referred to a Collection Agency.
- (3) Find the defendant guilty.

The court’s ruling shall be deemed an adjudication of the case.

f. AFTER FINDING OF GUILT

In the event the court finds the defendant guilty, the court shall do the following:

- (1) The court will send a Conviction Notice to the defendant.
- (2) The notice will state that the defendant has been convicted, the total amount owed, and that the defendant has twenty (20) days to request a Trial de Novo. The notice shall further state that if the defendant takes no action within that period of time, the case will be referred to a collection agency.
- (3) The conviction will be reported to DMV.

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g. IF DEFENDANT CONTACTS THE COURT WITHIN TWENTY FIVE (25) DAYS OF THE CONVICTION NOTICE DATE

In the event the defendant contacts the court within 25 days of the date the Conviction Notice is sent to the defendant, the defendant shall have the following options to resolve the Conviction Notice:

- (1) The defendant can request a Trial de Novo. If the defendant requests a Trial de Novo, the court shall promptly schedule it as court resources and scheduling permit. If the defendant prevails at the Trial de Novo, the court will send an amendment to the DMV to remove the conviction from the defendant's driving record.
- (2) The defendant can submit an Inability to Pay Declaration. If the defendant submits an Inability to Pay Declaration, the due date for the fines and fees shall be extended for 30 days. The declaration shall be routed to the Judicial Officer for ruling. The court shall notify the defendant of the court's decision.
- (3) The defendant can pay the fine amount owing in full.

h. FAILURE TO RESPOND TO CONVICTION NOTICE WITHIN TWENTY FIVE (25) DAYS OF THE CONVICTION NOTICE DATE

In the event the defendant fails to contact the court within 25 days of the date the Conviction Notice is sent to the defendant, the court shall refer the case to a collection agency.

i. WHEN A CASE THAT HAS A TRIAL IN ABSENTIA IS SENT TO A COLLECTION AGENCY

In the event that a case involving a defendant convicted in absentia is referred to a collection agency, the following shall apply:

- (1) The case becomes a delinquent account for the record.
- (2) Because the case is deemed adjudicated, any communications regarding the amount owed are to go through the collection agency.

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**Rule 2 – Criminal and Traffic Infraction Cases
PART FOUR: Traffic Infraction Cases**

- (3) Eliminates the ability to schedule a court trial.
- (4) Eliminates the need for the Collection Agency to enter case dispositions or adjust cases in the court case management system.
- (5) Since the case is convicted, the account becomes eligible for transfer to the Franchise Tax Board (FTB) Court Ordered Debt Program where money is collected from the defendant’s paycheck or bank account.

The case remains within the jurisdiction of the Collection Agency and may be transferred to the FTB Tax Intercept Program, however, it does not prevent the defendant from submitting an Inability-To-Pay Declaration form through the Collection Agency to have the fine reduced, or to be allowed to do community service, or receive credit for time served.

(Rule 2.100 adopted effective January 1, 2023.)

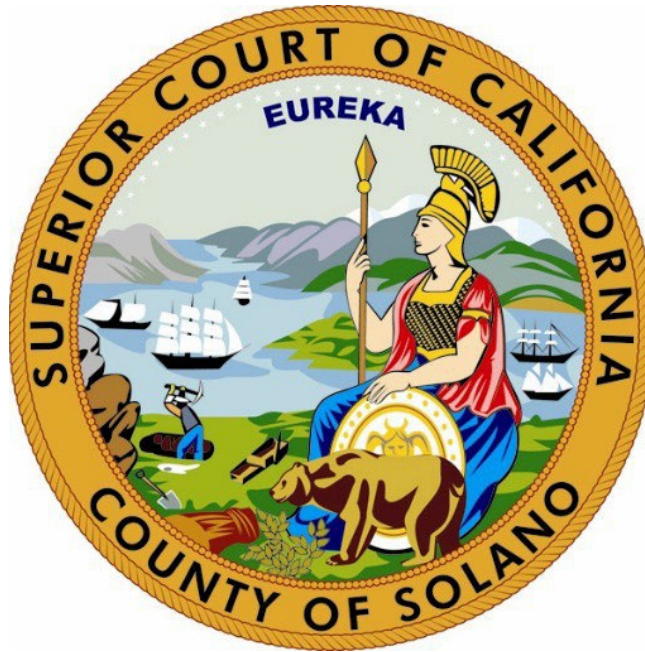
2.151 – 2.199 [Reserved]

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Rule 2 – Criminal and Traffic Infraction Cases

APPENDIX

**MENTAL HEALTH DIVERSION
PROCEDURES AND POLICIES**



SOLANO COUNTY SUPERIOR COURT

INTRODUCTION. California Penal Code **section 1001.36** sets forth a discretionary pre-trial diversion procedure for any defendant charged with a misdemeanor or felony, who suffers from a mental disorder listed in the Diagnostic and Statistical Manual (DSM) of Mental Disorders, the symptoms of which can be abated with treatment, if the mental disorder played a significant part in the commission of the charged offense.

ELIGIBILITY. The Court has broad discretion to grant or deny diversion. In exercising said discretion, the Court shall consider all of the following requirements:

1. The court is satisfied that the defendant suffers from a mental disorder as identified in the most recent edition of the Diagnostic and Statistical Manual of Mental Disorders, including, but not limited to, bipolar disorder, schizophrenia, schizoaffective disorder, or post-traumatic stress disorder, but excluding antisocial personality disorder, borderline personality disorder, and pedophilia; said information should specifically detail “recent diagnosis” of the disorder.
2. The court is satisfied that the defendant’s mental disorder played a significant role in the commission of the charged offense;
3. In the opinion of a qualified mental health expert, the defendant’s symptoms motivating the criminal behavior would respond to mental health treatment;
4. The defendant consents to diversion and waives the right to a speedy trial;
5. The defendant agrees to comply with treatment as a condition of diversion;
6. The court is satisfied that the defendant will not pose an unreasonable risk of danger to public safety, as defined in section 1170.18, if treated in the community; and,
7. The court is satisfied that the recommended inpatient or outpatient program of mental health treatment will meet the specialized mental health treatment needs of the defendant.
8. The Court shall consider whether defendant’s conduct in prior diversion or treatment programs suggest that defendant is now unsuitable.
9. If questions regarding defendant’s competence arise (pursuant to Penal Code section 1368, et.seq.), defendant may nonetheless place an incompetent defendant on diversion, provided that he/she is deemed “suitable”. Penal Code sections 1370(a)(1)(B)(iv) and 1370.01(a)(2).

Offenses not eligible for Mental Health Diversion:

1. Murder or voluntary manslaughter;
2. An offense for which a person, if convicted, would be required to register pursuant to section 290, except for a violation of section 314;
3. Rape;
4. Lewd or lascivious act on a child under 14 years of age;

5. Assault with intent to commit rape, sodomy, or oral copulation, in violation of section 220;
6. Commission of rape or sexual penetration in concert with another person, in violation of section 264.1;
7. Continuous sexual abuse of a child, in violation of section 288.5; and,
8. A violation of subdivision (b) or (c) of section 11418.

MENTAL HEALTH DIVERSION – PROCEDURES

A. Notice of motion. Defense counsel shall file an Application for Mental Health Diversion (MHD), pursuant to section 1001.36, with the Court and serve the prosecutor with a copy. The motion shall specify in detail:

- a. The mental disorder at issue, including diagnostic and treatment history of said disorder. If the defendant suffers from multiple or co-occurring disorders, the application shall so specify.
- b. A description of the nexus between defendant's mental disorder and the charged offense;
- c. The opinion of a qualified mental health expert indicating that the defendant's symptoms motivating the criminal behavior would respond to mental health treatment;
- d. A statement that the defendant consents to diversion and waives the right to a speedy trial;
- e. A statement that the defendant agrees to comply with treatment as a condition of diversion;
- f. A description of the proposed treatment plan. Said plan shall include, at a minimum, a discussion of:
 - i. Plan for receipt of medical / clinical treatment, including, if appropriate, plans for access to psychotropic medication
 - ii. Housing
 - iii. Insurance coverage / options for treatment
 - iv. Available support systems, including family and/or mentor support

B. Meet & confer prior to motion. Prior to hearing on the motion for diversion, defense counsel and prosecution shall meet and confer to determine:

- a. Whether the parties agree that diversion is appropriate;
- b. If there is no agreement, whether modifications of the treatment plan could lead to agreement for diversion.

C. Initial hearing on motion. The Court shall initially conduct a hearing to determine if the defendant has made a prima facie showing that he/she is suitable for consideration for mental health diversion. The Court shall find either:

- a. A *prima facie* basis for diversion has been established; and the Court further finds the defendant and suitable for MHD.

- b. A *prima facie* basis for diversion has not been established and the MHD is denied;
or
- c. A *prima facie* basis for diversion has been established, but the Court finds the defendant is not suitable for MHD.

If the Court finds that the defendant is suitable for MHD, it shall set a further hearing for defendant to present a treatment plan. If diversion is initially denied, the case shall continue as scheduled.

D. Diversion commencement hearing. The Court shall conduct a hearing to accept defendant's waivers and formally approve the diversion plan. At the hearing, the defense counsel shall file a copy of the treatment plan with the Court. The Court shall retain the treatment plan in the confidential section of the court file.

- a. **Approval of treatment plan.** The Court shall review the treatment plan and decide as follows:
 - i. If the treatment plan is **suitable**: the Court shall grant the motion for MHD and stay the criminal proceedings; and the defendant shall have up to two years from this date to complete treatment. The defendant shall sign the Order for Mental Health Diversion. The defendant shall be ordered to return for a progress report hearing 30 to 90 days out on a MHD review calendar.
 - ii. If the treatment plan is **not suitable**: the Court shall order the defendant to get an updated plan and continue the hearing. Once the treatment plan is approved, the Court shall make the same orders noted in (a) above. If the Court is not able to find a treatment plan suitable, the Court may deny the motion for diversion and resume with the criminal proceedings.

E. MHD status conference. No less than 5 days prior to the date scheduled for progress report, the defense shall submit a progress report which shall describe, in detail, all progress made on each specified element of the treatment plan. The Court shall retain the treatment plan in the confidential section of the court file. At the progress report hearing, the judicial officer shall review the report for compliance, and if:

- a. The defendant is making progress, set another progress report date (in 30 to 90 days);
- b. The defendant is not making progress, the Court may:
 - give defendant additional time to comply and continue progress hearing to another date;
 - terminate defendant from the program and continue criminal proceedings—if requested, the Court may consider scheduling a noticed hearing to hear further evidence on why defendant should not be terminated from MHD;

F. Termination of Diversion or Modification of Treatment

- a. Motion to Terminate Diversion. The District Attorney (DA) may file or orally notice motion to terminate diversion on the following grounds:
 - a) The defendant is charged with an additional misdemeanor allegedly committed during the pretrial diversion and that reflects the defendant's propensity for violence.

- b) The defendant is charged with an additional felony allegedly committed during the pretrial diversion.
- c) The defendant is engaged in criminal conduct rendering him or her unsuitable for diversion.
- d) The defendant is performing unsatisfactorily in the assigned program, based upon the opinion of a qualified mental health expert (whom the court may deem an appropriate expert).

The court may do any of the following:

- a) Deny the motion and allow diversion to proceed. In this case the Court and counsel shall then select the next progress report court date.
- b) Deny the motion but modify and/or increase treatment level. In this case the Court and counsel shall then select the next progress report court date.
- c) Grant the motion terminating diversion and reinstate criminal proceedings.

G. Completion of MHD. Upon successful completion of all terms and conditions of diversion, the Court shall dismiss the matter pursuant to Penal Code section 1001.36.

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Rule 3 – Civil Cases

3.1 APPLICATION OF RULES

Rule 3 shall apply to all civil cases, limited and unlimited, filed in the Superior Court of California, County of Solano. Unless otherwise specified elsewhere in the local rules, Rule 3 shall not apply to matters filed under the California Family Code (including adoptions and petitions to terminate parental rights), small claims cases, unlawful detainer cases, probate cases, mental health cases, juvenile cases, or extraordinary writs.

Any reference in these rules to “attorney” or “counsel” shall apply equally to any person representing himself or herself in a case subject to these rules.

(Rule 3.1 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective October 1, 2002, January 1, 2009, and January 1, 2010.)

3.2 DIRECT CALENDARING OF CIVIL CASES; ASSIGNMENTS AND REASSIGNMENTS

When a civil case is filed, or received and filed as a transfer from another county, the Clerk of the Court shall assign the case to one of the judges in the Civil Division of the court. The assignment to a judge shall be deemed to be for all purposes. The method of selection of the judge to be assigned to a case shall be subject to the approval of the Supervising Judge of the Civil Division and shall be designed to equally distribute the workload among the judges of the Civil Division and best serve the court.

When a judicial officer is disqualified in a civil matter, either on a peremptory challenge, for cause, or by the judicial officer’s own determination, the matter shall be reassigned per Rule 1.4. A matter reassigned to another judicial officer for any other reason shall likewise be for all purposes, unless otherwise ordered by the Presiding Judge or Supervising Judge of the Civil Division.

This rule does not apply to limited jurisdiction collection actions that qualify under California Rules of Court, rule 3.740, except that a judge may be assigned in those cases upon any of the following events: (1) The plaintiff’s failure to file proof of service or obtain order for publication of summons within 180 days of the filing of the complaint; (2) the plaintiff’s failure to obtain default judgment within 360 days of the filing of the complaint, if no responsive pleading has been filed; or (3) upon the filing of a responsive pleading by a defendant.

(Rule 3.2 amended effective January 1, 2012; adopted effective January 1, 1998; previously amended effective January 1, 2009, and July 1, 2011.)

**Superior Court of California
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Rule 3 – Civil Cases

3.3 NOTIFICATION OF PLAINTIFF OF ASSIGNMENT TO ONE JUDGE FOR ALL PURPOSES

Upon the filing of the complaint, the Clerk of the Court shall notify plaintiff, plaintiff's attorney, or an agent of the plaintiff of the assignment to one judge for all purposes; and, if in person, the person receiving notice shall sign an acknowledgement of the notification on a form to be prepared by the Clerk of the Court indicating thereon that the notification is received on behalf of plaintiff. The clerk shall file the acknowledgement of the notification in the court file with an attached proof of personal service. If the notification of the plaintiff, his attorney or agent is not in person and acknowledged in writing, then the clerk shall mail a notice to plaintiff at his or her address of record by first class mail and file a proof of mailing in the court file.

Plaintiff shall promptly notify all parties in the case at the time the assignment is made and notify all parties who later enter the case and file with the court a proof of service of such notification of the assignment to a judge for all purposes within five (5) days after the notice is served.

(Rule 3.3 amended effective July 1, 2010; adopted effective January 1, 1998.)

3.4 DESIGNATION OF COURT [Repealed]

(Rule 3.4 repealed effective July 1, 2011; adopted effective January 1, 1998; amended effective October 1, 2002, and July 1, 2010.)

3.5 CALENDARING OF HEARINGS

With the exception of ex parte matters, all hearings shall be scheduled through the Civil Division calendar clerk.

(Rule 3.5 adopted effective July 1, 2011.)

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Rule 3 – Civil Cases

3.6 DEPOSIT OF JURY FEES

Advance jury fees in the amount of one hundred and fifty dollars (\$150.00) shall be deposited with the Clerk of the Court in compliance with Code of Civil Procedure section 631. Jury fees deposited after June 27, 2012, are nonrefundable.

(Rule 3.6 amended effective July 1, 2013; adopted as Rule 3.10 effective January 1, 1998; previously amended effective October 1, 2002; previously amended and renumbered effective January 1, 2010; amended effective July 1, 2011, and January 1, 2013.)

3.7 FORFEITURE OF JURY FEES PER CCP SECTION 631.3

For purposes of Rule 3.6 and per Code of Civil Procedure section 631.3, it is deemed necessary for the court to have at least five court days notice of waiver of jury, continuance or settlement of the case in order to notify the jurors that the trial will not proceed at the time set. Failure to notify the court in writing of a waiver of jury, continuance of a jury trial date, or settlement of a case set for trial at least five court days prior to the assigned date of trial shall result in the forfeiture of the jury fee deposit.

Because jury fees deposited after June 27, 2012, are nonrefundable, this local rule shall apply only to cases where jury fees were deposited on or before June 27, 2012.

(Rule 3.7 amended effective July 1, 2013; adopted as Rule 3.11 effective January 1, 1998; amended and renumbered effective January 1, 2010; amended effective July 1, 2011, and January 1, 2013.)

3.8 NOTIFICATION TO COURT OF DROPS, CONTINUANCES AND STIPULATIONS

When a matter is to be dropped, continued or stipulated to, counsel for the moving party shall promptly notify the department of the court to which the matter is assigned. No matters will be continued after announcement of a tentative ruling thereon, except by order of the court for good cause.

No matter shall be continued unless the department of the court to which the matter is assigned approves of the continuance date. Any continuance requested within forty-eight (48) hours of the hearing date shall be directed to the department in which the hearing is scheduled for approval.

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Rule 3 – Civil Cases

In the absence of a showing of good cause by counsel, no matter shall be continued on the law and motion calendar pursuant to stipulation of counsel, or otherwise, more than twice.

(Rule 3.8 amended and renumbered effective January 1, 2010; adopted as Rule 3.13 effective January 1, 1998; former Rule 3.8, which concerned the court case number, repealed effective January 1, 2010.)

3.9 TENTATIVE RULINGS

a. AVAILABILITY OF TENTATIVE RULINGS

Per California Rules of Court, rule 3.1308, the court has adopted a tentative rulings procedure for civil law and motion. A tentative ruling on a civil matter will be available after 2:00 p.m. on the court day immediately preceding the scheduled hearing on that matter by signing onto the court’s web site at www.solano.courts.ca.gov and selecting “Tentative Rulings,” or by telephoning (707) 207-7331. Tentative rulings will not be posted for unlawful detainer matters.

(Subd (a) amended effective July 1, 2015; adopted as Rule 3.14 effective January 1, 1998; previously amended effective October 1, 2002; amended and relettered effective January 1, 2010; previously amended effective July 1, 2011, January 1, 2012, and July 1, 2013.)

b. NOTIFICATION OF INTENT TO APPEAR AT HEARING

The tentative ruling shall become the ruling of the court unless a party desiring to be heard notifies the court and all other parties of the party’s intention to appear.

The party desiring to be heard shall advise the court of his or her intention to appear by doing either of the following no later than 4:30 p.m. on the court day preceding the hearing:

- (1) Submitting a *Request for Oral Argument* through the court’s website; or,
- (2) Telephoning the department hearing the matter at the telephone number indicated in the tentative ruling.

In either case, the party giving notice of his or her intention to appear shall advise the court that the party has notified all other parties of the party’s intention to appear and argue.

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Rule 3 – Civil Cases

(Subd (b) amended effective July 1, 2017; adopted as Rule 3.15 effective January 1, 1998; relettered as subd (b) effective January 1, 2010; previously amended effective July 1, 2010 and January 1, 2016.)

c. ARGUMENT ON TENTATIVE RULING

Where an appearance has been requested or invited by the court, limited argument will be entertained, not to exceed 20 minutes per case. Appearances may be made telephonically, in accordance with California Rules of Court, rule 3.670 and Solano County Local Rules, rule 4.12(h), unless the court orders a personal appearance.

(Subd (c) amended effective July 1, 2011; adopted as Rule 3.16 effective January 1, 1998; previously amended effective January 1, 2009; relettered effective January 1, 2010.)

d. NOTICE OF TENTATIVE RULINGS SYSTEM TO BE INCLUDED IN NOTICE OF MOTION

All motions shall include notice of this local rule in substantially the following form: “Notice: The Superior Court in and for Solano County has adopted a tentative rulings system that is described in the court’s local Rule 3.9. Failure to comply with Rule 3.9 may seriously affect parties’ rights in this case.”

(Subd. (d) adopted effective January 1, 2012.)

(Rule 3.9 amended effective July 1, 2017; adopted as Rule 3.14 effective January 1, 1998; previously amended effective October 1, 2002; amended and renumbered as Rule 3.9 effective January 1, 2010; amended effective July 1, 2010, July 1, 2011, January 1, 2012, July 1, 2013, July 1, 2015, and January 1, 2016.)

3.10 TELEPHONIC APPEARANCES

Litigants or counsel wishing to appear by telephone per California Rules of Court, rule 3.670 shall refer to the Court’s website at www.solano.courts.ca.gov and follow the procedures as set forth on the website. Litigants or counsel wishing to appear telephonically shall be responsible for all fees and costs charged by the service provider.

(Rule 3.10 amended effective July 1, 2017; adopted effective July 1, 2014.)

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3.11 APPEARANCES BY PERSONS IN CUSTODY

The court will not transfer or transport an inmate to court in connection with a civil complaint for damages, including a small claims action. Pursuant to Code of Civil Procedure section 116.540(f), a party incarcerated in a county jail, a Department of Corrections and Rehabilitation facility, or a Division of Juvenile Facilities facility is not required to personally appear, but may submit written declarations to serve as evidence supporting their claim. Such declarations must be filed at least five (5) court days in advance. An inmate wishing to make a telephonic appearance must make the request in writing at least five (5) court days in advance. If no declarations have been received by the court and no telephonic appearance has been scheduled, dismissal of the action or entry of a default judgment may be entered.

(new Rule 3.11 adopted July 1, 2020.)

**3.12 FAILURE TO NOTIFY COURT WHEN ATTORNEY CANNOT BE PRESENT
SHALL BE DEEMED SUFFICIENT CAUSE TO ORDER OFF CALENDAR**

If an attorney cannot be present on time at the call of the matter on calendar, he or she must, prior to the call, inform the courtroom clerk of that department of the reason for and extent of such delay. Failure to appear or furnish such information shall be deemed sufficient cause for ordering the matter off calendar or for proceeding to hear the matter in the absence of counsel, as the court, in its discretion, may determine.

(Rule 3.12 renumbered July 1, 2020; renumbered as 3.11 effective January 1, 2010; adopted as Rule 3.19 effective January 1, 1998.)

3.13 OFF CALENDAR

A law and motion matter that has gone off calendar may be restored thereto only upon notice, excepting in an extraordinary situation, to be determined by the court in its discretion.

(Rule 3.13 renumbered effective July 1, 2020; Rule 3.12 renumbered effective January 1, 2010; adopted as Rule 3.20 effective January 1, 1998; former Rule 3.12, which concerned the California Rules of Court, repealed effective January 1, 2010.)

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3.14 EX PARTE MATTERS

Ex parte matters will be heard upon appointment scheduled directly with the designated department. The date and time of the ex parte hearing must be confirmed with the designated department prior to the moving party giving notice of the hearing. For purposes of this rule, the designated department is the department already assigned to the case, or, if the case has not yet been assigned to a department or judicial officer, the designated department is the department assigned by the Supervising Judge.

Unless otherwise expressly authorized by law, a party requesting ex parte relief related to law and motion matters shall file the underlying motion prior to or contemporaneously with filing of the ex parte application. The ex parte application shall comply with California Rules of Court 3.1200-3.1207.

A request to schedule an ex parte hearing may be summarily denied without hearing when the request fails to meet the criteria set forth in California Rules of Court, rules 3.1200-3.1207. Ex parte applications submitted to seek scheduling relief from court setting guides or caps, but which do not otherwise seek relief from the Code of Civil Procedure or California Rules of Court, may be summarily granted without a hearing.

An ex parte hearing shall be conducted only following the filing of the ex parte application and supporting paperwork, any underlying related motion, and proof of satisfaction of any filing fees. Prior to the commencement of the hearing, the moving party shall file a declaration under penalty of perjury confirming that notice was provided to the opposing side, including the date, time, manner and name of any party so informed and proof of service of any applicable papers.

(Rule 3.14 renumbered effective July 1, 2020; Rule 3.13 amended effective July 1, 2018; adopted as Rule 3.21 effective January 1, 1998; previously amended effective July 1, 2005; previously amended effective July 1, 2009; renumbered as Rule 3.13 effective January 1, 2010; amended effective July 1, 2010; amended effective July 1, 2011; amended effective July 1, 2013.)

3.15 MOTIONS TO CONSOLIDATE

Motions to consolidate cases shall be heard in the department to which the case with the lowest file number is assigned.

In the event that cases are consolidated and unless otherwise ordered by the judicial officer hearing the consolidation motion, the pleadings filed thereafter shall be filed in the case file with the lowest file number and the consolidated case shall be assigned for all purposes

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to the judge to which the case with the lowest file number is assigned.

(Rule 3.16 renumbered effective July 1, 2020; Rule 3.15 amended effective July 1, 2010; adopted as Rule 3.26 effective January 1, 1998; renumbered as Rule 3.15 effective January 1, 2010.)

3.16 MOTIONS PAPERS

Motions papers must be received within three court days of reserving a law and motion date. If papers are not received within three court days, the date reserved will be canceled.

(Rule 3.17 renumbered effective July 1, 2020; Rule 3.16 amended effective July 1, 2010; adopted as Rule 3.27 effective October 1, 2002; renumbered as Rule 3.16 effective January 1, 2010.)

3.17 MANDATE ACTIONS ARISING UNDER THE CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA)

a. WHERE FILED

Mandamus actions challenging an agency decision under the California Environmental Quality Act (Public Resources Code §21000 et seq.) (“CEQA”) shall be filed in the office of the Civil Clerk of the Court. Each action shall be accompanied by an initial filing form designating the action as Environmental Law – CEQA (Public Resources Code § 21167.1), and shall be assigned to the designated CEQA department for all purposes.

(Subd (a) amended effective July 1, 2010; adopted effective July 1, 2005.)

b. MEDIATION

In accordance with Government Code section 66031, within five (5) days after the deadline for respondent or defendant to file a response to the action, plaintiff or

petitioner shall prepare and lodge with the designated CEQA department a notice form for the court’s signature inviting mediation. The court shall then mail the notice of invitation to the parties.

(Subd (b) amended and relettered effective July 1, 2010; adopted as subd (c) effective July 1, 2005; prior subd (b), concerning ordering the administrative record, repealed effective July 1, 2010.)

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c. PREPARING THE ADMINISTRATIVE RECORD

(1) Preparation by the Public Agency

- (a) Within twenty (20) calendar days after receipt of a request to prepare the administrative record, the public agency responsible for such preparation shall personally serve on petitioners a preliminary notification of the estimated cost of preparation, setting forth the agency's normal costs per page, other reasonable costs, if any, the agency anticipates, and the likely range of pages. This notice shall also state, to the extent then known, the location(s) of the documents anticipated to be incorporated into the administrative record, shall designate the contact person(s) responsible for identifying the agency personnel or other person(s) having custody of those documents, and shall provide a listing of dates and times when those documents will be made available to petitioners or any party for inspection during normal business hours as the record is being prepared. This notice shall be supplemented by the agency from time to time as additional documents are located or determined appropriate to be included in the record.

(Subd (a) relettered effective January 1, 2010; adopted as Subd (d)(1) effective July 1, 2005.)

- (b) Upon receipt of this preliminary notification, petitioners may elect to prepare the record themselves provided they notify the agency within five (5) calendar days of such receipt. If petitioners so elect, then within forty (40) calendar days of service of the initial notice to prepare the administrative record, petitioners shall prepare and serve on all parties a detailed index listing the documents proposed by petitioners to constitute the record. Within seven (7) calendar days of this notification, the agency and/or other parties shall

prepare and serve the petitioners and all parties with a document notifying them of any document(s) or item(s) that such parties contend should be added to, or deleted from, the record. The agency shall promptly notify petitioners of any required photocopying procedures and/or conditions with which petitioners must comply in their preparation of the record.

(Subd (b) relettered effective January 1, 2010; adopted as Subd

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(d)(2) effective July 1, 2005.)

- (c) If petitioners do not so elect, then within forty (40) calendar days after service of the request to prepare the administrative record, the agency shall prepare and serve on the parties a detailed index listing the documents proposed by the agency to constitute the record and provide a supplemental estimated cost of preparation. Within seven (7) calendar days of receipt of this notification, petitioners and/or any other parties shall prepare and serve the agency and all parties with a document notifying the agency of any document(s) or item(s) that such parties contend should be added to, or deleted from, the record.

(Subd (c) relettered effective January 1, 2010; adopted as Subd (d)(3) effective July 1, 2005.)

(Subd (1) amended effective January 1, 2010; adopted effective July 1, 2005.)

(2) Preparation by Petitioners

(a) Within twenty (20) calendar days after receipt of petitioners' notice of election to prepare the record themselves, the public agency responsible for certification of the record shall personally serve on petitioners a preliminary notification designating, to the extent then known, the location(s) of the documents anticipated to be incorporated into the administrative record, the contact person(s) responsible for identifying the agency personnel or other person(s) having custody of those documents, and the dates and times when those documents will be made available to petitioners or any party for their inspection and copying. This notice shall also state any required photocopying procedures and/or conditions with which petitioners must comply in their preparation of the record. This notice shall be supplemented by the agency as additional documents are located or determined appropriate to be included in the record.

(Subd (a) adopted effective July 1, 2005.)

- (b) Within forty (40) calendar days after service of petitioners' notice of election, petitioners shall prepare and serve on all parties a detailed index listing the documents proposed by petitioners to

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constitute the record. Within seven (7) calendar days of this notification, the agency and/or other parties shall prepare and serve the petitioners and all parties with a document notifying them of any document(s) or item(s) that such parties contend should be added to, or deleted from, the record.

(Subd (b) adopted effective July 1, 2005.)

(Subd (2) renumbered effective January 1, 2010; adopted as Subd (d)(4) effective July 1, 2005.)

(Subd (c) relettered effective July 1, 2010; adopted as subd (d) effective July 1, 2005; amended effective January 1, 2010.)

d. FORMAT OF ADMINISTRATIVE RECORD

The format of the administrative record shall be governed by California Rules of Court, rules 3.1365 and either 3.1367 or 3.1368, as appropriate.

(Subd (d) amended and relettered effective July 1, 2010; adopted as subd (e) effective July 1, 2005.)

e. LODGING THE ADMINISTRATIVE RECORD IN ELECTRONIC FORMAT

Any party lodging the administrative record in an electronic format as permitted by California Rules of Court, rule 3.1365 et seq. shall simultaneously file a declaration with the court affirming under penalty of perjury that the medium in which the record is contained and lodged with the court is free of computer viruses or other malware.

(Subd (e) amended and relettered effective July 1, 2010; adopted as subd (f) effective July 1, 2005.)

f. DISPUTES REGARDING THE CONTENTS OF THE ADMINISTRATIVE RECORD

Once the record has been filed, any disputes about its accuracy or scope should be resolved by appropriate noticed motion. For example, if the agency has prepared the record, petitioners may contend that it omits important documents or that it contains inappropriate documents; if the petitioners have prepared the record, the agency may have similar contentions. A motion to supplement the certified record with additional documents and/or to exclude certain documents from the record

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may be noticed by any party and should normally be filed concurrently with the filing of petitioners' opening memorandum of points and authorities in support of the writ. Opposition and reply memoranda on the motion should normally be filed with the opposition and memoranda, respectively, regarding the writ. The motion should normally be calendared for hearing concurrently with the hearing on the writ.

(Subd (f) relettered effective July 1, 2010; adopted as subd (g) effective July 1, 2005.)

g. BRIEFING SCHEDULE AND LENGTH OF MEMORANDA

Unless otherwise ordered by the court, the following briefing schedule shall be followed in all cases:

- (1) Petitioners shall file directly in the designated CEQA department and serve personally, by overnight mail or, if previously agreed, by fax or electronic service, an opening memorandum of points and authorities in support of the petition within thirty (30) days from the date the administrative record is served.
- (2) Respondent and Real Party in Interest shall file directly in the designated CEQA department and serve personally, by overnight mail, or if previously agreed, by fax or electronic service, opposition points and authorities, if any, within thirty (30) days following service of petitioners' memoranda of points and authorities.
- (3) Petitioners shall have twenty (20) days from service of the opposition's points and authorities to file directly in the designated CEQA department and serve personally, by overnight mail, or if previously agreed, by fax or electronic service, a reply memorandum of points and authorities.
- (4) The parties may agree upon a shorter time frame for briefing by written stipulation filed with the court.

(Subd (g) amended and relettered effective July 1, 2010; adopted as subd (i) effective July 1, 2005.)

h. TRIAL NOTEBOOK

Petitioner shall prepare a trial notebook which shall be filed with the designated CEQA Department fourteen (14) days before the date of the hearing. The trial notebook shall consist of the petition, the answer(s), the briefs, any motions set to

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be heard at trial, the statement of issues, and any other document(s) agreed upon by the parties or ordered by the court.

(Subd (h) amended and relettered effective July 1, 2010; adopted as subd (j) effective July 1, 2005; previous subd (h), concerning notice of hearing, repealed effective July 1, 2010.)

(Rule 3.18 renumbered effective July 1, 2020; Rule 3.17 amended effective July 1, 2010; adopted as Rule 3.28 effective July 1, 2005; amended and renumbered as Rule 3.17 effective January 1, 2010.)

3.18 FILING OF NOTICES OF UNAVAILABILITY

The court shall not accept for filing a "Notice of Unavailability of Counsel" or other document or pleading whose sole purpose is to advise the court and/or other parties of an attorney's or party's unavailability. (*Carl v. Superior Court of Orange County* (2007) 157 Cal.App.4th 73.)

(Rule 3.19 renumbered effective July 1, 2020; Rule 3.18 renumbered effective January 1, 2010; adopted as Rule 3.29 effective January 1, 2009.)

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4.1 SCOPE AND POLICY

a. SCOPE OF RULE 4

Rule 4 is intended to implement the Trial Court Delay Reduction Act (Government Code section 68600 et seq.) and shall apply to all general civil actions. The term “general civil action” shall have the same meaning as set forth in California Rules of Court, rule 1.6, subdivision (4).

Rule 4 shall not apply to uninsured motorist cases, coordinated cases, or collections cases unless and until they become subject to the Trial Court Delay Reduction Act per California Rule of Court, rule 3.712.

(Subd (a) amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective July 1, 2005, and January 1, 2010.)

b. POLICY AND CASE DISPOSITION STANDARDS

It is the policy of this court that all civil cases shall be resolved as expeditiously as possible, consistent with the obligation of the courts to give full and careful consideration to the issues presented, and consistent with the right of the parties to adequately prepare and present their cases to the court. Furthermore, it is the policy of the court that all actions subject to these rules shall be actively managed, supervised and controlled by the court from the time of filing of the first document invoking the court’s jurisdiction through final disposition. This court’s case disposition standards are as set forth in California Rules of Court, rule 3.714, subdivision (b).

(Subd (b) amended effective January 1, 2010; adopted effective January 1, 1998; previously amended effective July 1, 2005.)

c. APPLICABILITY OF RULE 4 TO OTHER RULES

Notwithstanding Rule 4.1, subsection (a), any rule within Rule 4 may be made expressly applicable to other proceedings through the enactment of or amendment to a local rule governing that proceeding.

(Subd (c) amended effective January 1, 2010; adopted effective January 1, 2009.)

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(Rule 4.1 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective July 1, 2005, January 1, 2009, and January 1, 2010.)

4.2 CASE DESIGNATION

a. DEFAULT DESIGNATION OF CASE; TIMING OF DESIGNATION

All civil cases subject to these rules shall be classified as TRACK A cases unless, on good cause shown, the court designates the case as a TRACK B case or TRACK C (complex) litigation. The determination as to whether a case is designated as a TRACK B or TRACK C case under these rules shall be at the sole discretion of the court. The designation may be made by the court at any case management conference, trial management conference, mandatory settlement conference, or any hearing noticed by the court or counsel.

(Subd (a) amended and lettered effective January 1, 2010; adopted as unlettered portion of Rule 4.2 effective January 1, 1998; previously amended effective July 1, 2005.)

b. TRACK A CASES

TRACK A cases are cases that are to be resolved within twelve (12) months of the date that the complaint was filed.

(Subd (b) amended and lettered effective January 1, 2010; adopted as unlettered portion of Rule 4.2 effective January 1, 1998; previously amended effective July 1, 2005.)

c. TRACK B AND TRACK C CASES

TRACK B and TRACK C cases are those which generally involve multiple parties, complex issues, difficult legal questions, unusual proof problems, or other circumstances which result in a case not being adequately prepared for trial within twelve (12) months of its filing even with due diligence being exercised by all parties. It is the policy of the court to conclude all TRACK B cases within eighteen (18) months and TRACK C cases within twenty-four (24) months of the filing of the initial pleading.

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(Subd (c) amended and lettered effective January 1, 2010; adopted as unlettered portion of Rule 4.2 effective January 1, 1998; previously amended effective July 1, 2005.)

d. REDESIGNATION OF CASE

Following the designation by the court of the case as TRACK A, TRACK B, or TRACK C, the court, on its own motion or on the motion of any party, may order the case redesignated.

(Subd (d) amended and lettered effective January 1, 2010; adopted as unlettered portion of Rule 4.2 effective January 1, 1998; previously amended effective July 1, 2005.)

(Rule 4.2 amended effective January 1, 2010; adopted effective January 1, 1998; previously amended effective July 1, 2005.)

4.3 TIME REQUIREMENTS FOR COMPLAINT

Time requirements for service of the complaint shall be as specified by California Rules of Court, rules 3.110 and 3.740, subdivision (c).

(Rule 4.3 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective October 1, 2002, and January 1, 2009.)

4.4 TIME REQUIREMENTS FOR RESPONSIVE PLEADINGS

Time requirements for service of responsive pleadings shall be as specified by California Rules of Court, rules 3.110, 3.740, subdivision (c), and 3.1320.

(Rule 4.4 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective October 1, 2002, January 1, 2009, and January 1, 2010.)

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4.5 TIME REQUIREMENTS FOR CROSS-COMPLAINTS

Time requirements for service of cross-complaints shall be as specified by California Rules of Court, rules 3.110 and 3.1320.

(Rule 4.5 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective October 1, 2002, and January 1, 2010.)

4.6 CASE MANAGEMENT CONFERENCES

a. SCHEDULING OF CASE MANAGEMENT CONFERENCE ONE

In all cases subject to the case management rules in California Rules of Court, rule 3.720 et seq., the Clerk of the Court will schedule the first Case Management Conference approximately 120 days from the date of filing of the complaint. At the time of filing of the complaint, the Clerk of the Court shall provide the plaintiff with a Notice of Case Management Conference One, which shall indicate the date, time, and place that counsel, and any party not represented by counsel, shall appear for Case Management Conference One, and shall state the obligations of counsel, or any parties not represented by counsel, in regard to Case Management Conference One and Case Management Conference Two. Plaintiff is responsible for notifying all defendants of the initial or any continued Case Management Conference dates.

(Subd (a) amended effective July 1, 2011; adopted as unlettered portion of Rule 4.6 effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009; amended and relettered effective January 1, 2010.)

b. CASE MANAGEMENT CONFERENCES IN “UNINSURED MOTORIST” CASES

An action for personal injury or property damage against an uninsured defendant may be designated as an “uninsured motorist case” upon application of the plaintiff filed concurrently with the petition or within thirty (30) days of the commencement of the action. Upon the filing of such an application, the court will set the first Case Management Conference approximately 180 days from the date of the designation.

(Subd (b) amended effective July 1, 2011; adopted as Subd (a) of Rule 4.6 effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009; relettered effective January 1, 2010.)

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c. CASE MANAGEMENT CONFERENCES IN LIMITED JURISDICTION “COLLECTION” CASES

The plaintiff may designate a limited jurisdiction case as a “collection” case by filing a Civil Case Cover Sheet describing the case as a “collections” matter. No case management conference will be scheduled unless and until a responsive pleading has been filed.

(Subd (c) relettered effective January 1, 2010; adopted as Subd (b) of Rule 4.6 effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009.)

d. SERVICE OF NOTICE OF CASE MANAGEMENT CONFERENCE

(1) Service of Notice with Complaint

The plaintiff shall serve the Notice of Case Management Conference on all defendants with the complaint.

(Subd (1) renumbered effective January 1, 2010; previously adopted as portion of Subd (f) effective January 1, 1998.)

(2) Service of Notice with Cross-Complaint

Any plaintiff and any defendant serving a cross-complaint shall serve a copy of the Notice of Case Management Conference One provided by the Clerk, which sets the date and place for Case Management One, on each cross-defendant with the cross-complaint. In the event that any cross-complaint is served after Case Management Conference One has been held, the cross-complainant, at the time of service of the cross-complaint, shall serve each cross-defendant with Notice of Case Management Conference Two, which shall contain the date, time and place of Case Management Conference Two and explain the obligations of the parties in regard to case management conferences under these rules.

(Subd (2) renumbered effective January 1, 2010; previously adopted as portion of Subd (f) effective January 1, 1998.)

(Subd (d) amended and relettered effective January 1, 2010; adopted as Subd (f) of Rule 4.6 effective January 1, 1998; previously amended effective October 1, 2002,

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July 1, 2005, and January 1, 2009; former Subd (d) repealed effective January 1, 2010.)

e. TELEPHONIC APPEARANCE AT CASE MANAGEMENT CONFERENCES

Litigants or counsel wishing to appear by telephone per California Rules of Court, rule 3.670 shall refer to the Court’s website at www.solano.courts.ca.gov and follow the procedures as set forth on the website. Litigants or counsel wishing to appear telephonically shall be responsible for all fees and costs charged by the service provider.

(Subd (e) amended effective July 1, 2017; adopted effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, January 1, 2009, and January 1, 2010.)

f. CASE MANAGEMENT CONFERENCE SETTING

(1) For all cases subject to Rule 4.6, subdivision (a), Case Management Conference One shall be set during the calendar week that is 120 calendar days after the filing of the complaint, on the day of week and at the time designated by the judge to whom the case is assigned for all purposes. Case management conferences for other cases shall be set in a similar manner per the timelines applicable to those cases.

(Subd (1) amended effective July 1, 2011; adopted effective January 1, 1998.)

(2) At Case Management Conference One, the court shall refer the matter to arbitration or mediation, if deemed appropriate by the court, continue the matter for further Case Management Conference One or set the matter for a Case Management Conference Two.

(Subd (2) adopted effective January 1, 1998.)

(3) The court may, in its discretion, require additional case management conferences and additional Case Management Statements.

(Subd (3) adopted effective January 1, 2010; previously adopted as portion of Subd (h).)

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(Subd (f) amended effective July 1, 2011; adopted as Subd (g) effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009; amended and relettered effective January 1, 2010.)

g. UPDATED CASE MANAGEMENT STATEMENTS FOR CONTINUED CASE MANAGEMENT CONFERENCES

Unless otherwise ordered by the court, an updated Case Management Statement shall be filed by each counsel no later than the fifteenth (15th) calendar day before each continued Case Management Conference or any review set by the court.

(Subd (g) amended effective July 1, 2011; adopted as Subd (h) effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009; amended and relettered effective January 1, 2010.)

h. SANCTIONS

Pursuant to Code of Civil Procedure section 575.2, the court may impose sanctions in the event that any of the following occur:

- (1) A Case Management Statement is not timely filed and/or served;
- (2) A Case Management Statement is not fully completed;
- (3) The attorney who appears at a case management conference is not completely aware of all procedural, factual, and legal aspects of the case and does not have full authority to discuss and resolve any issues that arise at the conference, including the settlement of the case. This rule applies equally to counsel of record and special appearance counsel;
- (4) Counsel and self-represented parties fail to meet and confer as required per California Rules of Court, rule 3.724 prior to the Case Management Conference concerning all issues before the court.

(Subd (h) amended and relettered effective January 1, 2010; adopted as Subd (i) effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009.)

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(Rule 4.6 amended effective July 1, 2011; adopted effective January 1, 1998; previously amended effective October 1, 2002, July 1, 2005, and January 1, 2009; amended effective January 1, 2010.)

4.7 DIVERSION TO ARBITRATION

a. ORDER TO NONBINDING ARBITRATION

- (1) The following matters shall be subject to judicial nonbinding arbitration:
 - (a) All nonexempt unlimited civil actions in which the amount in controversy does not exceed \$50,000.
 - (b) All nonexempt limited civil cases, except for small claims actions or any action maintained pursuant to Civil Code section 1781 or Code of Civil Procedure section 1161.
 - (c) Any matter in which the parties stipulate to arbitration, provided the stipulation is filed no later than the time the initial case management statement is filed, unless the court permits a later time.
- (2) Notwithstanding subsection (1) above, matters that have been referred to mandatory mediation per local rule 4.8 shall not be referred to arbitration.
- (3) As to those cases ordered to arbitration, judicial arbitration will proceed in accordance with the Judicial Arbitration rules for civil cases (California Rules of Court, rule 3.810 et seq.), except as otherwise stated in these rules.

(Subd (a) amended effective January 1, 2012; adopted effective January 1, 1998; previously amended effective October 1, 200, and January 1, 20102.)

b. SELECTION OF ARBITRATOR

- (1) If the parties have a preference for an arbitrator, counsel shall provide the name, address, and telephone number of the preferred arbitrator to the court's ADR Administrator within twenty (20) days of the referral to arbitration. The statement of preference is not binding on the court, but may be considered in selecting the arbitrator.

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- (2) The court shall select the arbitrator from the court’s list of arbitrators. The court shall notify the parties of the name, address, and telephone number of the arbitrator selected by the court within thirty (30) days of the referral to arbitration.

(Subd (b) amended effective January 1, 2012; adopted effective January 1, 1998; previously amended effective October 1, 2002, and January 1, 2010.)

(Rule 4.7 amended effective January 1, 2012; adopted effective January 1, 1998; previously amended effective October 1, 2002, and January 1, 2010.)

4.8 MEDIATION

a. ADOPTION OF CIVIL ACTION MEDIATION PROGRAM (CCP § 1775 ET SEQ.)

Effective January 1, 2012, and per the authority in Code of Civil Procedure section 1775.2, subdivision (b), the court adopts the Civil Action Mediation Program set forth in Title 11.6 of the Code of Civil Procedure. Mediations conducted per the Civil Action Mediation Program (“the Mediation Program”) in Solano County shall be subject to all applicable statutes and California Rules of Court concerning the Civil Action Mediation Program (e.g. Cal. Rules of Court, rule 3.870 et seq.).

(Subd (a) adopted effective January 1, 2012; prior subd. (a) relettered as subd. (d) effective January 1, 2012.)

b. MATTERS TO WHICH MEDIATION PROGRAM APPLIES

The following matters shall be subject to mandatory mediation:

- (1) All nonexempt unlimited civil actions filed on or after January 1, 2012, in which the amount in controversy does not exceed \$50,000.
- (2) All nonexempt limited civil cases filed on or after January 1, 2012, except for small claims actions.
- (3) Any matter, regardless of filing date or the amount in controversy, in which the parties stipulate to mediation, provided the stipulation is filed at least ninety (90) days prior to trial, unless the court permits a later time.

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(Subd (b) adopted effective January 1, 2012; prior subd. (b) repealed effective January 1, 2012.)

c. ORDER TO MEDIATION

Cases shall be referred to mediation whenever the court determines from the facts as set forth in a Case Management Statement or as stated by counsel at any Case Management Conference, Trial Management Conference, or Mandatory Settlement Conference that the matter is subject to mandatory mediation per these rules and has not already been referred to mediation or any form of arbitration, unless good cause is found to not refer the matter.

(Subd (c) adopted effective January 1, 2012; prior subd. (c) repealed effective January 1, 2012.)

d. SELECTION OF MEDIATOR

(1) If the parties have a preference for a mediator, counsel shall provide the name, address, and telephone number of the preferred mediator to the court's ADR Administrator within twenty (20) days of the referral to mediation. The statement of preference is not binding on the court, but may be considered in selecting the mediator.

(Subd. (1) amended and renumbered effective January 1, 2012.)

(2) The court shall select the mediator from the court's list of mediators. The court shall notify the parties of the name, address, and telephone number of the mediator selected by the court within thirty (30) days of the referral to mediation.

(Subd. (2) amended and renumbered effective January 1, 2012.)

(Subd (d) amended and relettered effective January 1, 2012; adopted as subd. (a) effective July 1, 1998; previously amended effective July 1, 2005.)

e. APPEARANCE AT MEDIATION SESSIONS

(1) For purposes of California Rules of Court 3.894, subsection (a), when a party is other than a natural person, it shall appear at the mediation sessions through a representative, other than the party's attorney, with full authority

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to resolve the dispute or, in the case of a governmental entity that requires an agreement to be approved by an elected official or legislative body, by a representative with authority to recommend such agreement. Failure of the representative to appear at the mediation session may be cause for sanctions.

(Subd. (1) amended and renumbered effective January 1, 2012.)

- (2) “Full authority” to resolve the dispute means the person is empowered to make settlement decisions without telephone consultation with others.

(Subd. (2) adopted effective January 1, 2012.)

(Subd (e) amended and relettered effective January 1, 2012; adopted as subd. (b) effective July 1, 1998; previously amended effective July 1, 2005; prior subd. (e) relettered as subd. (j) effective January 1, 2012.)

f. RELATED, COORDINATED, AND CONSOLIDATED CASES

Counsel in cases that have been related, coordinated, or consolidated shall inform the court of all pending mediation proceedings in the related, coordinated, or consolidated cases.

(Subd. (f) adopted effective January 1, 2012.)

g. INTERPRETERS

Any party desiring to use an interpreter during mandatory mediation must notify the ADR Administrator, all other parties, and the mediator at least 10 days prior to the first mediation session at which the interpreter will be used. Unless otherwise ordered by the court, the party seeking the use of the interpreter shall make all arrangements directly with the interpreter and shall assume the costs of the service.

(Subd. (g) adopted effective January 1, 2012.)

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h. EX PARTE COMMUNICATIONS

Ex parte communications refers to communications with the mediator outside the presence of the opposing counsel or self-represented party. Ex parte communications with the mediator are not prohibited.

(Subd. (h) adopted effective January 1, 2012.)

i. CONFIDENTIALITY

(1) Mediations are confidential and subject to the confidentiality privilege set forth in Evidence Code sections 703.5 and 1115 through 1128. No communications or writings made in connection with the mediation may be disclosed to the assigned judge or to any other person not involved in the mediation, unless disclosure is agreed to by all parties or permitted by subsection (2), infra. The mediator shall require the parties and all persons attending the mediation to sign a confidentiality agreement at the first mediation session.

(Subd. (1) adopted effective January 1, 2012.)

(2) The following disclosures are permitted:

- (a) A disclosure stipulated in writing by all parties and the mediator, or orally in compliance with Evidence Code section 1118;
- (b) A report to or inquiry by the ADR Administrator concerning a complaint against a mediator;
- (c) A disclosure made by any participant or the mediator in responding to an appropriate request for information made by persons authorized by the ADR Administrator to monitor or evaluate the court's mediation program;
- (d) A disclosure required by law;
- (e) A settlement agreement signed by all parties waiving the confidentiality provision of Evidence Code section 1122 et seq., and containing a provision explicitly rendering the agreement enforceable per Code of Civil Procedure section 664.6; or,

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- (f) A disclosure made in connection with a request for sanctions for a party's noncompliance with mediation. This disclosure shall be limited to the minimum facts needed to support the motion.

(Subd. (2) adopted effective January 1, 2012.)

(Subd. (i) adopted effective January 1, 2012.)

j. MEDIATION COMPLAINT PROCEDURE

Per California Rules of Court, rule 3.868, the court adopts the following mediator complaint procedure:

- (1) Complaints are only accepted from a party to the action or the party's attorney.
- (2) The complainant must register his or her complaint in writing with the ADR Administrator. The written complaint must include the following information:
 - (a) The names of the parties in the case and their attorneys;
 - (b) The case number;
 - (c) The most recent court date;
 - (d) The name(s) of any mediation personnel (i.e. mediators or mediation clerks) with whom the complainant had contact; and,
 - (e) A statement explaining the reasons for the complaint.
- (3) Upon receiving the complaint, the ADR Administrator will notify the complainant in writing that the court has received the complaint.
- (4) The ADR Administrator shall review the complaint and determine whether the complaint can be informally resolved or closed, or whether the complaint warrants investigation. If the complaint warrants an investigation, the ADR Administrator shall take the following steps:
 - (a) The ADR Administrator shall give notice of the complaint to the mediator and provide a reasonable opportunity to respond.

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- (b) The complaint shall be investigated and a recommendation made concerning court action. The investigation shall be conducted by an investigator designated by the ADR Administrator or the Presiding Judge. The investigator shall provide his or her recommendation to the Presiding Judge or his or her designee.
- (c) The final decision shall be made by the Presiding Judge or his or her designee. Notice of the final action taken shall be sent by the court to the complainant and, if the complaint was not resolved during the preliminary review by the ADR Administrator, to the mediator.

(Subd (j) relettered effective January 1, 2012; adopted effective January 1, 2010, as subd. (e); previously amended effective July 1, 2011.)

k. **SANCTIONS**

Upon noticed motion and an opportunity to be heard, the court may impose sanctions for failure to meaningfully participate in the mediation process. Sanctions may include, but are not limited to, mediator's fees and attorney fees and costs. Willful failure to meaningfully participate includes, but is not limited to, the following:

- (1) Non-appearance at the time set for the mediation of any person necessary to proceed to a meaningful conclusion. Telephone calls to the mediator shall not constitute an appearance. However, upon agreement by all parties, a party may appear by telephone or other means of real-time electronic communication if he or she resides or has his or her primary place of business more than 500 miles from the mediation location.
- (2) Requests to continue the mediation session less than ten (10) days before the scheduled mediation session, unless good cause is shown.
- (3) Failure to complete mediation within the time fixed, unless good cause is shown.

(Subd. (k) adopted effective January 1, 2012.)

(Rule 4.8 amended effective January 1, 2012; adopted effective January 1, 1998; previously amended effective July 1, 2005, January 1, 2010, and July 1, 2011.)

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4.9 MANDATORY SETTLEMENT CONFERENCES

a. REQUIRED PARTICIPANTS

The lead trial counsel, parties, and persons with full settlement authority shall personally attend the Mandatory Settlement Conference unless excused by the court for good cause. In the case of an insured principal, the authorized representative of the insured’s insurance company must be present in lieu of the client, and must have full settlement authority. For purposes of these rules, “full settlement authority” means persons physically present in the courthouse who are empowered to make settlement decisions without telephone consultation with others. In no event will an independent adjuster satisfy the above requirement. In any professional negligence case in which the defendant retains the right to refuse settlement, participation of that defendant in the settlement conference is mandatory.

(Subd (a) amended and relettered effective January 1, 2010; adopted as unlettered portion of Rule 4.11 effective January 1, 1998; previously amended effective July 1, 2005.)

b. MEET AND CONFER REQUIREMENTS

No later than ten (10) calendar days before the date set for the mandatory settlement conference, trial counsel and all persons with ultimate authority to settle the case shall meet in person or, if all parties agree, by telephone to discuss settlement of the case.

(Subd (b) amended and relettered effective January 1, 2010; adopted as unlettered portion of Rule 4.11 effective January 1, 1998; previously amended effective July 1, 2005.)

c. ADDITIONAL REQUIREMENTS FOR MANDATORY SETTLEMENT CONFERENCE STATEMENTS

All settlement conference statements filed and served per California Rules of Court, rule 3.1380, subdivision (c), shall contain the following additional information:

- (1) A statement of the factual and legal contentions in dispute;
- (2) A list of all special damages claimed;

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- (3) Copies of pertinent medical reports;
- (4) Other reports by experts;
- (5) Pictorial or documentary evidence anticipated to be presented at trial;
- (6) An estimate of the lowest and highest possible award by a trier of fact;
- (7) The highest previous offer and the lowest previous demand;
- (8) The date when the last face to face or telephonic settlement discussion was held between all parties;
- (9) A statement as to any special problems relating to settlement, such as lack of or disputed insurance coverage; and,
- (10) A statement regarding the party's position regarding settlement of the case.

(Subd (c) amended effective July 1, 2011; adopted as unlettered portion of Rule 4.11 effective January 1, 1998; previously amended effective July 1, 2005; amended and relettered effective January 1, 2010.)

d. SANCTIONS

Failure of any attorney, adjustor, and/or party to prepare for, appear at, or meaningfully participate in a settlement conference, unless good cause is shown for any such failure, is an unlawful interference with the proceedings of the court, and the court may impose sanctions, including but not limited to, any or all of the following: monetary sanctions to be paid to the court; monetary sanctions to be paid to other parties which may include, among other things, costs, actual expenses, and counsel fees; and the court may order an appropriate change in the calendar status of the action.

(Subd (d) amended and relettered effective January 1, 2010; adopted as unlettered portion of Rule 4.11 effective January 1, 1998; previously amended effective July 1, 2005.)

(Rule 4.9 amended effective July 1, 2011; adopted as Rule 4.11 effective January 1, 1998; previously amended effective July 1, 2005; amended and renumbered effective January 1,

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2010; former Rule 4.9, which concerned other settings of cases, repealed effective January 1, 2010.)

4.10 TRIAL CONFERENCES

a. REQUIRED PARTICIPANTS

The lead trial counsel shall, unless excused by the court, appear at the Trial Conference prepared to respond to any questions the court may pose about the case.

(Subd (a) amended effective July 1, 2020; adopted as unlettered portion of Rule 4.12 effective January 1, 1998; previously amended effective July 1, 2005; relettered effective January 1, 2010.)

b. TRIAL CONFERENCE STATEMENT

The form designated by the court may be used as a cover sheet for all exhibits and motions in limine, but use of the court form is not mandatory. Each counsel shall complete, file and serve on all parties a completed Trial Conference Statement at least ten (10) court days before the date set for the Trial Conference. Use of dividers and/or tabs between each item is requested. At a minimum, the report shall include the following:

- (1) A statement of the nature of the case, with a summary of each party's allegations and supporting facts. Include an agreed-upon statement of the case to be read to the jury panel, if a jury has been requested by any party;
- (2) If there have been developments since the trial setting affecting the estimated length of trial, an explanation as to what those developments are and how the estimated length of trial should be changed as a result;
- (3) The names of any non-expert witnesses who may be called at trial, except for impeachment or rebuttal. State concisely the anticipated testimony of each non-expert witness and the time estimate for testimony, including direct and cross-examination;

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- (4) The names and expertise of any expert witnesses who may be called at trial, except for impeachment or rebuttal. State concisely the anticipated testimony of each expert witness and the time estimate for testimony, including direct and cross-examination. In addition, attach any narrative reports provided by the expert witness;
- (5) A list of all witnesses who are unavailable and whose testimony will be presented by deposition, along with the facts supporting that unavailability;
- (6) A list of all documents, exhibits, blowups, and/or photographs that the party expects to offer at trial, except for impeachment or rebuttal. Documents shall be identified by page number or Bates-stamp number as applicable (e.g. “Jane Doe’s Medical Records, pages 1 through 326”). Photos shall be separately identified;
- (7) A specific list in column form of all portions of depositions, answers to interrogatories and responses to request for admissions that the party expects to offer at trial, except for impeachment or rebuttal. All portions of depositions shall be identified by page and line number(s), while responses to written discovery must be identified by the manner of discovery request and the response number (e.g. “Response to Plaintiff’s Special Interrogatories, Set One, Interrogatory Number 4”; “Amended Response to Defendant’s Request for Admissions, Set Three, Request Number 7”);
- (8) A specific list of all anticipated evidentiary disputes with citation to authority;
- (9) A specific list of all anticipated non-evidentiary disputes with citation to authority;
- (10) All requested jury instructions and verdict forms in compliance with the California Rules of Court. Each instruction shall be typed in full and numbered consecutively, with the submitting attorney having filled in all blanks and having made a decision as to all alternatives in the CACI instructions. Two copies of the requested jury instructions shall be submitted to the court. One copy shall have citations to authority and boxes for the court’s use regarding whether the instruction is given, refused, or withdrawn, and one copy shall be presented without citations to authority and boxes regarding given, refused, or withdrawn;

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- (11) Copies of all in limine motions that the party expects to submit at trial. Each in limine motion provided shall be numbered consecutively by the party. (Note that any in limine motions not included will not be considered by the court, unless good cause is presented to the trial court);
- (12) All stipulations requested or proposed at trial;
- (13) A statement as to whether there are any witnesses that need an interpreter. State the name of the interpreter and the language that must be interpreted (If an interpreter is needed, it is the obligation of the party calling the witness to make arrangements for an interpreter);
- (14) A list of all agreed-upon jury instructions; and
- (15) A list of disputed jury instructions.

(Subd (b) amended effective July 1, 2020; adopted as unlettered portion of Rule 4.12 effective January 1, 1998; previously amended effective July 1, 2005; amended and relettered effective January 1, 2010; amended effective July 1, 2011, amended effective January 1, 2012.)

c. EXCLUSION OF EVIDENCE AND TESTIMONY AT TRIAL

The testimony of witnesses who are not listed in the Trial Conference Statement, or documents, or other exhibits, portions of depositions, answers to interrogatories or responses to requests for admissions, which are not listed in the Trial Conference Statement, shall not be admitted at the trial. However, the trial judge, in his or her sole discretion and upon a showing of good cause, may permit the testimony of witnesses who are not listed in the Trial Conference Statement and may allow the admission of exhibits or portions of discovery which are not listed in the Trial Conference Statement.

(Subd (c) amended effective July 1, 2020; adopted as unlettered portion of Rule 4.12 effective January 1, 1998; previously amended effective July 1, 2005, amended and relettered effective January 1, 2010.)

(Rule 4.10 amended effective July 1, 2020; adopted as Rule 4.12 effective January 1, 1998; previously amended effective July 1, 2005; amended and renumbered effective January 1, 2010; amended effective July 1, 2011; former Rule 4.10, which concerned setting short causes for trial, repealed effective January 1, 2010; amended effective January 1, 2012.)

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4.11 DISMISSAL OF ACTION FOLLOWING SETTLEMENT

If an entire action is settled, Plaintiffs or other parties seeking affirmative relief must immediately file and serve a Notice of Settlement pursuant to Rule 3.1385 of the California Rules of Court. Failure to do so may cause unnecessary calendar appearances and/or the unnecessary allocation of judicial and court resources. Consequently, such failures may result in the imposition of monetary sanctions pursuant to Local Rule 4.13.a (1).

(Rule 4.11 amended effective July 1, 2023; adopted as Rule 4.13 effective January 1, 1998; renumbered effective January 1, 2010.)

4.12 MISCELLANEOUS

a. REQUEST FOR EXTENSION OF TIME

Any request for extension of time under these rules shall be filed with due diligence and, in addition to being signed by counsel shall be endorsed by the party acknowledging that the extension of time being requested by counsel is concurred in by the party. The request shall be made on the form provided by the court.

(Subd (a) amended effective January 1, 2009; adopted effective January 1, 1998.)

b. KNOWLEDGE OF CASE

Counsel and parties attending any hearing or conference set pursuant to these rules shall have sufficient knowledge of the case to inform the court as to all matters that are pertinent and relevant to the issues to be heard and have authority to enter into binding stipulations regarding any matters before the court. This rule shall apply equally to attorneys of record and specially appearing counsel.

(Subd (b) amended effective January 1, 2010; adopted effective January 1, 1998; previously amended effective January 1, 2009.)

c. REFERENCE TO “ATTORNEY” OR “COUNSEL”

Any reference in these rules to “attorney” or “counsel” shall apply equally to any person representing himself or herself in a case subject to these rules.

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(Subd (c) amended effective January 1, 2009; adopted effective January 1, 1998.)

d. REMOVAL FROM CIVIL ACTIVE LIST

A case shall not be removed from the civil active list except by order of the court.

(Subd (d) amended effective January 1, 2009; adopted effective January 1, 1998.)

e. EXCUSE FROM RULE REQUIREMENT

Any requirement of these rules may be excused by the court upon a showing of good cause.

(Subd (e) amended effective January 1, 2009; adopted effective January 1, 1998.)

f. UNINSURED MOTORIST CASE [Repealed]

(Subd (f) repealed effective July 1, 2011; adopted effective January 1, 1998; amended effective January 1, 2009.)

g. REMOVAL TO FEDERAL COURT [Repealed]

(Subd (g) repealed effective July 1, 2011; adopted effective January 1, 1998; amended effective January 1, 2009.)

h. TELEPHONIC APPEARANCES

Litigants or counsel wishing to appear by telephone per California Rules of Court, rule 3.670 shall refer to the Court's website at www.solano.courts.ca.gov and follow the procedures as set forth on the website. Litigants or counsel wishing to appear telephonically shall be responsible for all fees and costs charged by the service provider.

(Subd (h) amended effective July 1, 2017; adopted effective January 1, 2009; previously amended effective January 1, 2010.)

i. BENCH COPIES OR CHAMBERS COPIES

At the discretion of the judicial officer assigned to the case, parties may be required to deposit an additional copy of specific documents directly with the assigned judicial department.

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(Subd (i) adopted effective July 1, 2014.)

(Rule 4.12 amended effective July 1, 2017; previously amended effective July 1, 2011; adopted as Rule 4.14 effective January 1, 1998; previously amended effective January 1, 2009; amended and renumbered effective January 1, 2010; previously amended effective July 1, 2014.)

4.13 SANCTIONS

a. SANCTIONS GENERALLY

Upon the motion of a party or on the court’s own motion, the court may impose sanctions for non-compliance with these rules. Sanctions will not be imposed without prior notice to, and an opportunity to be heard by, the party or attorney against whom the sanction or penalty is sought to be imposed. Available sanctions include, but are not limited to:

- (1) Monetary sanctions;
- (2) Evidentiary sanctions prohibiting the introduction of designated matters into evidence;
- (3) Striking out all or any part of any pleading;
- (4) Dismissal of an action, proceeding, or any part thereof;
- (5) Entering judgment by default against a party; and,
- (6) Contempt sanctions.

(Subd (a) amended and relettered effective January 1, 2010; adopted as unlettered part of Rule 4.15 effective January 1, 1998.)

b. ATTORNEY FEES AND COSTS

In addition to any sanction, the court may order a party or his or her counsel to pay to a party moving for compliance with these rules the reasonable expenses in making the motion, including reasonable attorney fees.

(Subd (b) amended and relettered effective January 1, 2010; adopted as unlettered part of Rule 4.15 effective January 1, 1998.)

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c. SANCTIONS RELATED TO REQUESTS TO EXTEND TIME FOR FILING

Monetary sanctions and, in the court’s discretion, more severe sanctions, will be imposed upon counsel or his or her party who in bad faith or without good cause request an extension of time for the filing of any pleading or document as required by these rules.

(Subd (c) relettered effective January 1, 2010; adopted as unlettered part of Rule 4.15 effective January 1, 1998.)

d. SANCTIONS AGAINST ATTORNEYS

If the court determines that the failure to comply with the rules is the responsibility of a party’s attorney or counsel, the penalty shall be imposed on the attorney or counsel personally and shall not adversely affect the party’s cause of action or defense thereto.

(Subd (d) adopted effective January 1, 2010.)

(Rule 4.13 amended and renumbered effective January 1, 2010; adopted as Rule 4.15 effective January 1, 1998.)

4.14 ELECTRONIC FILING AND SERVICE OF PLEADINGS AND DOCUMENTS

The court does not permit electronic filing as defined in California Rules of Court, rule 2.250. However, nothing in this rule shall be construed as prohibiting or otherwise limiting service of documents electronically as provided elsewhere in the California Rules of Court.

(Rule 4.14 adopted effective July 1, 2010; previous Rule 4.14 renumbered as Rule 4.12 effective January 1, 2010.)

4.15 ELECTRONIC SERVICE OF DOCUMENTS IN COMPLEX LITIGATION

In all cases designated as “complex” per California Rules of Court, rule 3.403, the following rule shall apply, unless modified by court order.

a. ELECTRONIC SERVICE OF DOCUMENTS

(1) All documents shall be served electronically as set forth in this order and in California Rules of Court, rule 2.251.

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- (2) Original documents must be filed with the court as required by the Code of Civil Procedure, the California Rules of Court, or the local rules of the Superior Court of California, County of Solano. Nothing in this rule shall be construed to require or permit electronic filing of documents with the court.
- (3) Per California Rules of Court, rule 2.253(b)(1)(F), this rule shall apply only to cases designated as complex per California Rules of Court, rules 3.400 through 3.403.
- (4) This rule shall apply to all attorneys in a complex matter. This rule shall apply to self-represented litigants only if they elect to participate in electronic service. Unrepresented litigants who do not elect to participate in electronic service shall serve and shall be served documents in the manner required by the Code of Civil Procedure, the California Rules of Court, and/or the local rules of the Superior Court of California, County of Solano.
- (5) The following documents shall not be served electronically:
 - (a) Documents filed under seal or subject to a pending motion to seal, unless electronic service is permitted or required by specific court order.
 - (b) Documents directed to an unrepresented party who has not elected to participate in electronic service.
 - (c) A summons, complaint, or cross-complaint.
- (6) The documents enumerated in (A)(5), *supra*, shall be served pursuant to the applicable provisions of the Code of Civil Procedure, California Rules of Court, and/or the local rules of the Superior Court of California, County of Solano.

b. DEFINITIONS

- (1) The definitions in California Rules of Court, rule 2.250(b) shall apply to this rule.
- (2) The term “plaintiff” includes a cross-complainant or an intervenor.
- (3) The term “initial complaint” includes a cross-complaint or a complaint in intervention.

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- (4) The term “amended complaint” includes an amended cross-complaint or an amended complaint in intervention.

c. DESIGNATION OF ELECTRONIC SERVICE PROVIDER

- (1) The court designates File & ServeXpress as the electronic service provider (“the ESP”). File & ServeXpress shall serve as the ESP absent notice by the court that the ESP has been changed or further court order. File & ServeXpress may be contacted by visiting <http://www.fileandservexpress.com> or by calling 888-529-7587.

d. NOTICE OF RULE APPLICABILITY

- (1) If a plaintiff designates the case as complex on the initial complaint, a copy of this rule shall be served on all defendants concurrently with the summons and complaint. If a plaintiff does not designate the case as complex on the initial complaint but designates it as complex on an amended complaint, a copy of this rule shall be served on all defendants concurrently with the amended complaint.
- (2) If a defendant designates the case as complex on the initial answer, a copy of this rule shall be served on all plaintiffs concurrently with the answer. If a defendant does not designate the case as complex on the initial answer but designates it as complex on an amended answer, a copy of this rule shall be served on all plaintiffs concurrently with the amended answer.
- (3) If neither party designates the case as complex but the court determines the case is complex per California Rules of Court, rule 3.403(b), the plaintiff shall serve a copy of this rule on all defendants within 5 calendar days of being notified by the court of the complex designation.
- (4) Any party that joins a new party into this action shall serve a copy of this rule on the new party at the time of initial service.

e. REGISTRATION WITH ELECTRONIC SERVICE PROVIDER

Upon the court designating a civil action as complex per California Rules of Court, rules 3.402 and 3.403, the following registration procedures shall apply:

- (1) Within 15 days of the court’s designation of the case as complex, the

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plaintiff's attorney, or the plaintiff if self-represented, shall submit to the ESP and to the court a complete and current list of the parties, party types, and counsel representing each party. The list shall include the names of any lead and other associated attorneys, together with addresses, telephone and facsimile numbers, and e-mail addresses. All lists shall be sent to the following e-mail address: eservice@fileandservexpress.com. The ESP shall promptly notify all Registered Users of any changes to this e-mail address.

- (2) If an unrepresented party affirmatively consents to electronic service, the plaintiff's attorney, or the plaintiff if self-represented, shall submit to the ESP and to the court the unrepresented party's address, telephone number, facsimile number, and e-mail address in the same manner and within the same time limits as for attorneys.
- (3) All attorneys, and any unrepresented parties who consent to electronic service, shall register with the ESP in the manner designated by the ESP.
- (4) Each attorney and unrepresented party registered with the ESP shall keep his or her service information current and accurate with the ESP, all other attorneys and unrepresented parties, and the court.
- (5) Each attorney and unrepresented party registered with the ESP shall be referred to in this order as a "Registered User."

f. ESTABLISHMENT AND STRUCTURE OF COMPLEX LITIGATION WEBSITE

- (1) For each complex litigation case subject to this rule, the ESP shall establish and maintain an Internet website ("the Website"). The ESP shall post to the Website all documents submitted to the ESP by any Registered User and shall serve each document pursuant to the service list provided to the ESP in accordance with the procedures herein.
- (2) Access to the Website will be limited to Registered Users and authorized court personnel. The ESP will provide each Registered User and authorized court personnel with a user name and password to access the Website and the documents served in this action. The ESP personnel will perform all administrative functions for the Website, but all initial data, additions, deletions or changes to the service list must be submitted by the attorneys and/or parties.

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- (3) All documents posted on the Website will be identified by: (1) the name of the serving party or attorney; (2) the caption(s) of the case(s) to which the document belongs; (3) the title of the document set forth on its caption; and (4) the identity of the party on whose behalf the document is being served.
- (4) The Website shall contain an index of all served documents for the litigation that will be searchable and sortable according to methods that provide useful access to the documents.

g. **CONTENT AND FORMAT OF DOCUMENTS SERVED THROUGH THE ESP**

- (1) The document shall be served to the ESP either as a word-processing file or as a scanned image of the document. Each document shall be titled so as to identify the type and purpose of such document and the identity of the attorney or party who is serving such document.
- (2) Every pleading, document and instrument served electronically shall bear a facsimile or typographical signature of at least one of the serving attorneys and/or parties, along with the typed name, address, telephone number and State Bar of California number, where applicable, of such attorney or party. Typographical signatures shall be treated exactly as personal signatures for purposes of electronically served documents under the Code of Civil Procedure. The attorney and/or party serving any document requiring multiple signatures (e.g., stipulations, joint status reports) must list thereon all the names of other signatories by means of a “__s/___” block for each. By submitting such a document, the serving party certifies that each of the other signatories has expressly agreed to the form and substance of the document and that the serving attorney or party has the actual authority to submit the document electronically. The serving attorney or party must maintain any records evidencing this occurrence for subsequent production to the court if so ordered or for inspection upon request by any party.
- (3) A Registered User’s service of any document through the ESP shall be deemed to include an implied warranty that to the best of the Registered User's knowledge, the transmitted document does not contain malware.

h. **PROCEDURE FOR SERVICE THROUGH THE ESP**

- (1) A document shall be served through electronic transmission to the ESP over the Internet.

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- (2) After the ESP receives a document, the ESP shall convert such document into Adobe Portable Document Format (“PDF”) and post it to the Website within one (1) hour of receipt.
- (3) Within one (1) hour of the time a document is posted to the Website, the ESP will notify all Registered Users that a document has been posted to the Website. Registered Users will also receive a courtesy e-mail notification of a filing with which they have been served. The email shall contain a hyperlink to the document location(s) on the Website.
- (4) Each Registered User shall retain an original dated hard copy with hand written signature of all documents served electronically by that Registered User. All such hard copies shall be made available for inspection in the manner set forth in California Rules of Court, rules 2.251(i) and 2.257(a).

i. PROOFS OF SERVICE

- (1) Written proofs of electronic service shall conform to Code of Civil Procedure section 1013a and California Rules of Court, rule 2.251(i). The ESP's transaction receipt may operate as the proof of service so long as it complies with California Rules of Court, rule 2.251(i), and California Code of Civil Procedure section 1013a.
- (2) A proof of service page may be attached to the last page of any electronically served document. Neither a separate caption page nor a separate filing of the proof of service is required so long as the proof of service page contains a caption referencing the case name and action number, is attached as the last page of the electronically served document to which it refers, and references the ESP's transaction receipt.

j. EFFECT OF ELECTRONIC SERVICE

- (1) Each document electronically served pursuant to this rule shall be presumed to have been served in compliance with the Code of Civil Procedure.
- (2) The effective date of service shall be governed by California Rules of Court, rule 2.251(h).

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k. TECHNICAL PROBLEMS AND ERRORS

- (1) If electronic service does not occur or is delayed because of (1) an error in the transmission of the document to the ESP or served party which was unknown to the sending party, (2) a failure to process the electronic document when received by the ESP, (3) an erroneous exclusion from the service list, or (4) other technical problems experienced by the ESP, the party or parties affected shall, absent extraordinary circumstances, be entitled to an extension for any response or the period within which any right, duty, or other act must be performed, provided the Registered User demonstrates that he or she attempted to file or complete service on a particular day and time.
- (2) In the event the technical difficulties described above result in a Registered User being unable to comply with a statutory, court-ordered, or mutually-agreed deadline, the Registered User may obtain an ex parte court order granting an extension of time by following the standard ex parte procedure in the California Rules of Court and the court's local rules. Provided the technical problem has been resolved and the Website is operating normally, notice of the ex parte application may be given through the ESP. In addition to the ex parte application, the Registered User shall file and serve a declaration which describes the attempt(s) made, provides the reason service did not occur or was delayed, states how and when the non-service or delay in service was discovered, details the person's efforts made to rectify the situation, and states with specificity the extension of time sought.
- (3) If the technical difficulties described above do not prevent a Registered User from meeting a statutory, court-ordered, or mutually-agreed deadline, the Registered User may file and serve a declaration which describes the attempt(s) made to serve the documents, provides the reason(s) service did not occur or was delayed, states how and when the non-service or delay in service was discovered, details the person's efforts made to rectify the situation, and states with specificity the extension of time the party believes appropriate.

l. ELECTRONIC SERVICE OF ORDERS AND OTHER PAPERS BY COURT

The court may serve notices, orders, and other documents electronically subject to the provisions of this rule.

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m. **MODIFICATIONS TO THIS RULE**

The court may, on a party’s motion or on its own motion, order modifications to this rule in a specific case.

(Rule 4.15 adopted effective July 1, 2020, replacing the former standing order entered December 4, 2014.)

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5.1 MATTERS ASSIGNED TO THE FAMILY LAW DIVISION; APPLICABILITY OF RULE

a. ASSIGNMENT OF MATTERS TO THE FAMILY LAW DIVISION

All family law matters will be heard principally in the Family Law Division as designated by the Presiding Judge and in such additional departments to which such matters may, from time to time, otherwise be assigned for trial or hearing by the Supervising Judge of the Family Law Division.

(Subd (a) adopted effective January 1, 2013.)

b. MATTERS TO WHICH RULE 5 APPLIES

Rule 5 applies to all family law matters, including:

- (1) Proceedings under the Family Code for dissolution of marriage or registered domestic partnership, nullity of marriage or registered domestic partnership, legal separation, custody and support of minor children, termination of parental rights, adoptions, the Uniform Parentage Act, the Uniform Child Custody Jurisdiction and Enforcement Act, or the Uniform Interstate Family Support Act;
- (2) Local child support agency actions under the Family Code; and,
- (3) Contempt proceedings relating to family law or local child support agency actions.

Requests for protective orders under the Domestic Violence Prevention Act are governed by Rule 16, not Rule 5. However, ancillary issues (such as support, custody, and temporary possession of property) raised in such a request are governed by Rule 5.

(Subd (b) amended effective July 1, 2014; adopted effective January 1, 2013.)

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c. APPLICABILITY OF RULES TO PARTIES AND COUNSEL

Unless otherwise prohibited by law, Rule 5 applies to the parties, to the attorneys of represented parties, and to minor’s counsel. References to a party’s counsel or attorney includes a self-represented party.

(Subd (c) adopted effective January 1, 2013.)

(Rule 5.1 amended effective July 1, 2014; adopted effective January 1, 2013.)

5.2 DIRECT CALENDARING

a. ASSIGNMENT OF MATTER TO JUDICIAL OFFICER

When a family law case is filed, or received and filed as a transfer from another jurisdiction, the Clerk of the Court shall assign the case to one judicial officer for all purposes, as directed by and subject to the approval of the supervising judge of the Family Law Division. The assignment shall be designed to fairly distribute the workload among the judicial officers of the Family Law Division and best serve the court.

(Subd (a) adopted effective January 1, 2013.)

b. NOTIFICATION OF ASSIGNED JUDICIAL OFFICER

The Clerk of the Court shall notify the parties of the initial assignment of the case to a judicial officer at the time the petitioner’s initial pleading is filed.

(Subd (b) adopted effective January 1, 2013.)

c. NOTIFICATION OF REASSIGNMENT

Cases may be reassigned from time to time. Reassignments may be done on the record at a hearing or by written notification from the court.

(Subd (c) adopted effective January 1, 2013.)

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(Rule 5.2 adopted effective January 1, 2013.)

5.3 PREPARATION AND FILING OF FORMS AND PLEADINGS

a. USE OF SOLANO COUNTY COURT CASE NUMBER

The case number shall have the following format on all pleadings and forms filed with the court:

- (1) SF012345: All family law cases filed prior to December 8, 1999 (excepting adoptions and Uniform Parentage Act cases).
- (2) FFL012345: All family law cases filed on or after December 8, 1999 or whose case number is equal to or higher than FFL050994 (excepting adoptions and Uniform Parentage Act cases).
- (3) SA001234: All adoption cases filed prior to December 8, 1999.
- (4) FAD001234: All adoption cases filed on or after December 8, 1999, or whose case number is equal to or higher than FAD005778.
- (5) SL012345: All Uniform Parentage Act cases filed prior to December 8, 1999, including cases with case numbers formatted as “L012345”.
- (6) FCS012345: All Uniform Parentage Act cases filed between December 8, 1999, and September 30, 2002.
- (7) FFL012345: All Uniform Parentage Act cases filed on or after October 1, 2002, or whose case number is equal to or higher than FFL069339.

(Subd (a) adopted effective January 1, 2013.)

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b. **APPLICATIONS FOR ORDERS FOR PUBLICATION OF SUMMONS**

A petitioner seeking an order for publication of summons pursuant to Code of Civil Procedure section 415.50 may submit the request on either a local form made available for that purpose or in a pleading that contains the same substantive information required on the form.

(Subd (b) adopted effective January 1, 2013.)

c. **FORMS AND DOCUMENTS TO BE INCLUDED WITH MOVING PAPERS**

In addition to any forms required by the California Rules of Court, any *Request for Order* or other moving papers served on the other party shall include a copy of the court's local form *Meet and Confer Orders*.

A party seeking to modify a prior order or judgment shall attach a copy of the prior order or **pertinent** part of the prior judgment to his or her *Request for Order*. **A copy of the entire judgment need not be attached to the *Request for Order*.** If the *Findings and Order After Hearing* has not been filed, a copy of the minute order shall be attached instead.

A party filing an *Order to Show Cause and Affidavit for Contempt* (Judicial Council form FL-410) shall attach a copy of each order allegedly violated.

(Subd (c) adopted effective January 1, 2013.)

d. **FILING OF NOTICES OF UNAVAILABILITY**

The court shall not accept for filing a "Notice of Unavailability of Counsel" or other document or pleading whose sole purpose is to advise the court and/or other parties of an attorney's or party's unavailability. (*Carl v. Superior Court of Orange County* (2007) 157 Cal.App.4th 73.)

(Subd (d) adopted effective January 1, 2013.)

(Rule 5.3 adopted effective January 1, 2013.)

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5.4 APPLICATIONS FOR EMERGENCY ORDERS (EX PARTE ORDERS)

a. APPLICABILITY

All parties shall comply with the provisions in Chapter 7 of Division 1 of Title 5 of the California Rules of Court and with these local rules.

(Subd (a) amended effective July 1, 2014; adopted effective January 1, 2013.)

b. GENERAL STATEMENT REGARDING EMERGENCY ORDERS

Applications for emergency orders are appropriate only if needed to prevent an immediate danger or irreparable harm to a party or to the children involved in the matter, prevent immediate loss or damage to property subject to disposition in the case, shorten time for hearing or service, or continue a hearing or trial.

(Subd (b) adopted effective July 1, 2014; previous subd (b) relettered as subd (c) effective January 1, 2014.)

c. PROCEDURES FOR REQUESTING EMERGENCY ORDERS

All parties shall comply with the following procedures:

- (1) The original Request for Order plus two copies and any other documents required by statute or California Rules of Court plus two copies of each document shall be submitted through the Family Law Division's clerk's office. Unless the moving party has a valid fee waiver order on file or submits a fee waiver concurrently with the Request for Order, the moving party is required to pay all the applicable fees set by law at the time the Request for Order is submitted to the Family Law Division's clerk's office.
- (2) The emergency order hearing will be set on a date two court days after the documents are submitted to the Family Law Division's clerk's office. For submissions after received by 3:00 p.m., the emergency order hearing will be set on a date two court days after the documents are submitted to the Family Law Division's clerk's office. For submissions after 3:00 p.m., the emergency order hearing will be set on a date three days after the documents are submitted to the Family Law Division's clerk's office.
- (3) Before the emergency order hearing, the party shall file a declaration under penalty of perjury indicating whether or not notice of the hearing was given in compliance with

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California Rules of Court, rule 5.165. The moving party may satisfy this requirement by filing a completed Declaration Re Notice Upon Application For Emergency Orders (Family Law) (local form 5006-FL), a completed Judicial Council form approved for this purpose, or a declaration in compliance with California Rules of Court, rule 5.151(e)(2).

(Subd (c) amended effective July 1, 2022; adopted effective January 1, 2013; previously amended July 1, 2014 and January 1, 2016.)

(Rule 5.4 amended effective January 1, 2017; adopted effective January 1, 2013, previously amended July 1, 2014 and January 1, 2016.)

5.5 LAW AND MOTION HEARINGS (HEARINGS OTHER THAN CASE MANAGEMENT CONFERENCES, STATUS CONFERENCES, SETTLEMENT CONFERENCES, AND TRIALS)

a. SETTING AN INITIAL HEARING

When an initial hearing is set pursuant to a *Request for Order* or other paper seeking relief, the matter shall be set on the assigned judicial officer's law and motion calendar. The clerk shall provide the time and date for all initial hearings. All matters set on an initial hearing calendar are limited to 20 minutes of hearing time.

(Subd (a) adopted effective January 1, 2013.)

b. VACATING A SCHEDULED HEARING

(1) By the Moving Party

If the moving party's *Request for Order* or other papers seeking relief have not been served on the responding party, the moving party may take the matter off calendar by giving notice to the court, which may be done by telephone to the appropriate department. Notice does not need to be given to the responding party.

If the pleadings have been served on the responding party but no responsive pleadings have been filed, the moving party may take the matter off calendar but must give notice to both the court and the responding party so as to avoid unnecessary review by the court and appearances by the party. Notice to the court may be given by telephone to the appropriate department.

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(Subd (1) adopted effective January 1, 2013.)

(2) By Stipulation

If responsive pleadings have been filed, the moving party may not take the matter off calendar without written stipulation or written or oral confirmation by the responding party. Confirmation may be by telephone to the appropriate department.

If both parties agree no hearing is needed, both parties shall so inform the department to which a matter has been assigned as soon as practicable.

A failure to appear without prior notification to the court may result in the imposition of sanctions against one or both parties and/or attorneys, in the court's discretion.

(Subd (2) adopted effective January 1, 2013.)

(Subd (b) adopted effective January 1, 2013.)

c. REISSUANCE OF A REQUEST FOR ORDER

If the moving party did not serve the responding party before the date set for the hearing, a new hearing date may be obtained from the calendar clerk and a *Request for Order* may be reissued. The request to reissue the *Request for Order* must be submitted to the court at least two court days before the scheduled hearing date; otherwise, the party must appear at the hearing and request the reissuance in open court.

If a moving party does not obtain a reissuance prior to the hearing and fails to appear at the scheduled hearing to request a reissuance, the court may take the matter off calendar.

If the moving party served the responding party but the service was untimely, the moving party must attend the scheduled hearing. The responding party shall be entitled to a continuance and the court may reissue the *Request for Order*. Any temporary orders previously made may be extended upon a showing of good cause.

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(Subd (c) adopted effective January 1, 2013.)

d. DAY OF HEARING PROCEDURES

(1) Duty to Appear and to Advise Court of Settled Issues and Remaining Contested Issues

All parties and their attorneys shall be punctual for all court appearances and shall check in with the courtroom clerk or bailiff upon arrival.

The parties or the attorneys for the parties shall be prepared to advise the court as to what issues have been settled by agreement and what issues remain contested.

(Subd (1) adopted effective January 1, 2013.)

(2) Failure to Appear by Moving Party

If the moving party or attorney fails to appear when the matter is called, the court may continue or remove the matter from the calendar at its discretion. If the responding party appears, the court may award attorney fees and costs to the appearing party if as a result of the moving party's nonappearance unnecessary fees are incurred.

If the responding party appears and has filed and served a responsive pleading seeking appropriate affirmative relief, the court may continue the matter or rule on the affirmative relief requested, at its discretion.

(Subd (2) adopted effective January 1, 2013.)

(Subd (d) adopted effective January 1, 2013.)

e. TELEPHONIC APPEARANCES

A party, an attorney, or a representative of a local child support agency or government agency who wishes to appear by telephone at a hearing must file a request with the court clerk at least 2 court days prior to the date of the hearing.

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The request shall be made on a *Request for Telephone Appearance* (Judicial Council form FL-679). The request must be served on all other parties, their attorneys, and the local child support agency through a means calculated to ensure delivery by the close of business on the next court day.

If the court permits the appearance by telephone, and unless the court specifically directs otherwise, counsel or litigants wishing to appear by telephone shall refer to the Court's website at www.solano.courts.ca.gov and follow the procedures as set forth on the website. Counsel or litigants wishing to appear telephonically shall be responsible for all fees and costs charged by the service provider.

Absent prior court order, requests for telephonic appearances in trials, contempt hearings, orders of examination, and any other matters in which the person has been subpoenaed to appear will not be permitted. Rules for ex parte requests and orders shortening time shall apply.

(Subd (e) amended effective July 1, 2017; adopted effective January 1, 2013.)

f. INFORMAL DISCOVERY CONFERENCES

The procedure set forth in Local Rule 3.15 shall apply to informal discovery conferences brought in proceedings governed by Rule 5.

(Subd (f) adopted effective July 1, 2018.)

(Rule 5.5 amended effective July 1, 2018; Rule 5.5 adopted effective January 1, 2013.)

5.6 PRESENCE OF CHILDREN IN COURTROOM

Unless a child whose custody or visitation is at issue has been given court permission to address the court or testify per Family Code section 3042, that child shall not be present in the assigned courtroom while the matter is being heard, unless the judicial officer has specifically given permission for the child to be present.

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In the event a party or minor’s counsel wants the child to be present, that party or minor’s counsel may disclose to the court that the child is in the courthouse and request that the child be permitted into the courtroom.

(Rule 5.6 adopted effective January 1, 2013.)

**5.7 FAMILY CENTERED CASE RESOLUTION PROCESS (CRC 5.83)
[REPEALED]**

(Rule 5.7 repealed effective July 1, 2018; adopted effective January 1, 2013; amended effective January 1, 2018.)

5.8 STATUS CONFERENCES AND STATUS CONFERENCE REPORTS

a. PROCEDURE FOR SETTING A STATUS CONFERENCE

Status conferences may be used generally to assess the readiness of a case for meaningful settlement conference and/or trial. No party shall obtain a settlement conference or trial date except by court permission, which may be given at a status conference. Status conferences may be utilized at the court’s discretion for any other purpose deemed appropriate, such as for setting trial management conferences.

In dissolution of marriage, nullity of marriage, or legal separation matters, a status conference shall not be set at a party’s request unless that party has filed his or her *Declaration Regarding Service of Declaration of Disclosure and Income and Expense Declaration* (Judicial Council form FL-141) showing that the moving party has complied with the disclosure requirements set forth in Family Code section 2104. Status conferences may be requested by filing a local form designated for that purpose, obtaining a date from the calendar clerk, and giving notice to the opposing party or counsel. Notice shall be consistent with Code of Civil Procedure section 1005 and proof of service of such notice shall be filed with the court.

Compliance with disclosure requirements is not required in Uniform Parentage Act cases or in proceedings to establish

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custody or support pursuant to Family Code section 3120. Thus, in cases brought per the Uniform Parentage Act or per Family Code section 3120, a party may request a status conference by filing a local form designated for that purpose, obtaining a date from the calendar clerk, and giving notice to the opposing party or counsel. Notice shall be consistent with Code of Civil Procedure section 1005 and proof of service of such notice shall be filed with the court.

The court may set a case on the status conference calendar at its discretion. No status conference may be continued or taken off calendar without court permission.

(Subd (a) relettered effective July 1, 2018; previously adopted as subd. (b) effective January 1, 2013; former subd (a) repealed effective July 1, 2018.)

b. FILING AND SERVICE OF STATUS CONFERENCE REPORT

At least seven (7) calendar days before the scheduled status conference, each party (or their counsel) shall file with the court and serve on all other parties a completed status conference report on a local form designated for that purpose. Proof of service of the status conference report shall be filed with the court at least seven (7) calendar days before the scheduled status conference.

(Subd. (b) amended effective July 1, 2023; Subd. (b) relettered effective July 1, 2018; previously adopted as subd. (c) eff. January 1, 2013; former subd. (b) relettered as subd. (a) effective July 1, 2018.)

c. SANCTIONS

The court may impose sanctions if:

- (1) A status conference report is not timely filed and served;
- (2) A status conference report is not fully completed;
- (3) A party or his or her attorney fails to appear at the status conference. However, an attorney may appear on behalf of a party unless the court has ordered a party to personally appear; or,

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- (4) An attorney or a party is not substantially aware of all procedural, factual, and legal aspects of the case, or an attorney does not have full authority to discuss and resolve any issues that arise at the conference, including, but not limited to, resolving discovery and the setting of subsequent court dates.

(Subd. (c) relettered effective July 1, 2018; previously adopted as subd. (d) effective January 1, 2013; former subd. (c) relettered as subd. (b) effective July 1, 2018.)

d. APPEARANCES AT STATUS CONFERENCES

An attorney or party may appear remotely for a status conference unless the judicial officer requires personal appearances. (See Local Rule 19).

(Rule 5.8 amended effective July 1, 2023; adopted effective January 1, 2013; previously amended effective January 1, 2018.)

5.9 COURT REPORTER FEES

Court reporter fees in family law proceedings are governed by Local Rule 18.

(Rule 5.9 amended effective July 1, 2023; adopted effective January 1, 2013.)

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5.10 SETTLEMENT CONFERENCES

a. **SETTLEMENT CONFERENCES GENERALLY**

Absent waiver for good cause shown, the court will require a mandatory settlement conference prior to that matter proceeding to trial. Each party and the attorney who will try the case for each party shall personally attend the settlement conference, unless the court excuses the party prior to the conference or has granted permission to appear telephonically.

(Subd (a) adopted effective January 1, 2013.)

b. **DUTY TO MEET AND CONFER**

The meet and confer requirements set forth in California Rules of Court, rule 5.98, shall also apply to settlement conferences.

Counsel and parties shall comply at all times with the policy of the law to promote settlement of litigation and, where possible, to reduce the costs of litigation by encouraging cooperation between the parties and attorneys (see Family Code section 271). Prior to the settlement conference, counsel and parties shall make good faith efforts to settle all or some of the issues. They must also cooperate so as to clearly outline and efficiently present the settled and unsettled issues to the court at the settlement conference.

(Subd (b) adopted effective January 1, 2013.)

c. **TIME FOR FILING AND SERVICE OF SETTLEMENT CONFERENCE STATEMENT AND OTHER REQUIRED DOCUMENTS**

Each party or attorney shall file and serve his or her settlement conference statement and any other documents required by this rule or by court order at least fourteen (14) calendar days prior to the settlement conference. Proof of service of the settlement conference statement shall be filed with the court at least seven (7) calendar days before the scheduled status conference.

(Subd (c) adopted effective January 1, 2013.)

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d. **CONTENTS OF SETTLEMENT CONFERENCE STATEMENT**

A settlement conference statement shall state in the caption the date and time of the settlement conference.

Settlement conference statements submitted in an dissolution of marriage or registered domestic partnership, nullity, or legal separation action shall respond to each item set forth below in this subdivision. Settlement conference statements submitted in any other matter shall respond to each item set forth below in this subdivision, except for items (4), (5), and (6). If a particular paragraph is not applicable, the statement shall indicate that fact.

(1) **Statistical Facts**

(a) **For Dissolutions, Nullities, and Legal Separations Only**

- (i) The date of marriage or registration of registered domestic partnership, the date of separation, and the length of the marriage or registered domestic partnership in years and months; and,
- (ii) If the date of separation or any other statistical fact is contested, the party shall provide all material facts in support of their position.

(b) **For All Cases:**

- (i) The names and ages of minor children and any disabled adult children to whom a duty of support may be owed;
- (ii) Ages of parties;
- (iii) Whether there are any contested issues as to statistical facts, and if so, a statement setting forth all material facts concerning the contested issue(s); and,
- (iv) The date service of process was completed, where it was made and how it was accomplished.

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(2) Child Custody and Visitation

- (a) A summary of the existing custody and visitation order or, if there is no existing order, the parties' current practice; and,
- (b) The party's proposal for custody and visitation. If the proposal is to change the existing custody or visitation order, the statement shall include all material facts in support of the proposal.

(3) Child Support

- (a) A summary of the existing child support order or, if there is no existing order, the parties' current practice;
- (b) All material facts in support of any unusual circumstances regarding income, expenses or ability to earn income;
- (c) A current calculation of the party's proposal for child support, pursuant to the relevant provisions of the Family Code, including a calculation of the percent of time share; and,
- (d) A statement whether or not either party receives public assistance or services from the Department of Child Support Services in the instant or related cases.

(4) Spousal or Partner Support (For Dissolutions, Nullities, and Legal Separations Only)

- (a) A summary of existing spousal or partner support order or, if there is no existing order, the parties' current practice;
- (b) All material facts in support of any unusual circumstances regarding income, expenses or ability to earn income;
- (c) The party's proposal for spousal or partner support; and,
- (d) All relevant and material facts in support of the party's position, including facts concerning each of the factors in Family Code section 4320 in the case of establishing or modifying post-judgment support.

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(5) Contested Property Issues (For Dissolutions, Nullities, and Legal Separations Only)

Each party shall list each contested asset or obligation, real or personal, and for each asset or obligation, furnish the following information, if relevant to the contested issue:

- (a) The date it was acquired;
- (b) If the asset has a formal title (e.g. house, vehicle, bank account, brokerage account, etc.), the manner in which title is vested;
- (c) The party's position as to the property's character, e.g. as community property, separate property, or quasi-community or quasi-marital property;
- (d) All material facts and law in support of the party's characterization of the property;
- (e) The current fair market value of the property;
- (f) The nature, extent and terms of any encumbrance against the property and the current net equity in the property;
- (g) Whether the property has any community property interest through application of *Moore/Marsden* or *Pereira/Van Camp*, and if so, the factual and legal basis for apportionment, the formula for apportionment, and the value of each party's community and separate property interests; and,
- (h) A detailed and complete proposal for the disposition of each item of property. If the proposed disposition is not substantially equal, the statement shall include a proposal for equalizing the disposition.

(6) Reimbursements and Credits (For Dissolutions, Nullities, and Legal Separations Only)

- (a) If a party is claiming *Epstein* credits, *Watts/Jeffries* credits, Family Code section 2640 reimbursements, or other claims for reimbursement or credits, the party shall include a complete

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statement setting forth the factual and legal basis for the credit or reimbursement claimed and the formula used (if any) to calculate the credit or reimbursement.

(7) Attorney Fees, Expert Fees, and Costs

- (a) Amounts paid by a party on account of his or her own attorney fees, expert fees, and costs, and any balances due for such fees and costs;
- (b) Amounts paid by a party on account of the other party's attorney fees, expert fees, and costs, and any balances due for such fees and costs; and,
- (c) If a party is requesting that his or her attorney fees, expert witness fees, or costs be paid in part or in full by the other party, state the additional amounts requested and the legal and factual basis for the request.

(8) Documents, Schedules, and Summaries

- (a) If property is to be characterized and/or divided, attach copies of all appraisals, expert reports, and other documentary evidence of an asset's value or amount of debt to be offered at the time of trial; and,
- (b) List and describe all documents, schedules or summaries, and/or other evidence to be offered at the time of trial. However, evidence intended for use only for impeachment purposes is not required to be listed.

(9) Witnesses and Reports

- (a) Give the name, address and telephone number of each witness the party plans to call at trial;
- (b) Attach a copy of each document schedule, summary, expert report or appraisal about which the witness will testify unless a copy is attached elsewhere in the settlement conference statement; and,
- (c) Provide a brief statement setting forth the substance of the witnesses' testimony.

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(10) Points and Authorities

With respect to disputed matters, each party shall list the points and authorities or legal arguments upon which that party intends to rely, so far as is known at the time the statement is prepared.

(Subd (d) amended effective January 1, 2018; adopted effective January 1, 2013.)

e. INCOME AND EXPENSE DECLARATION; TAX RETURNS

If child support, spousal support, attorney fees and costs, or sanctions are at issue and unless a current *Income and Expense Declaration* (Judicial Council form FL-150) is already on file, an updated *Income and Expense Declaration* shall be filed concurrently with the party's settlement conference statement. "Current" shall have the same definition as California Rules of Court, rule 5.260(a)(3). Each party shall also be prepared to provide the court with a complete copy of that party's two most recent federal personal tax returns. This shall include all schedules and attachments. If either party files a separate tax return for a business, a complete copy of the two most recent federal tax returns for that business shall also be made available. Except for Taxpayer Identification Numbers (TIN) or Social Security Numbers, no information on any tax returns provided to the court may be redacted.

(Subd (e) adopted effective January 1, 2013.)

f. TRIAL JUDGE AS SETTLEMENT CONFERENCE JUDGE

The settlement conference will be conducted by the trial judge. If any party objects to the trial judge acting as the settlement conference judge, the objecting party must do as follows:

- (1) Orally object at the hearing if the party is present at the hearing at which the settlement conference date is set; or,
- (2) Object in writing if the party is not present at the hearing at which the settlement conference date is set. The written objections must be filed no later than ten (10) calendar days after receiving notice of the settlement conference date.

(Subd (f) adopted effective January 1, 2013.)

(Rule 5.10 amended effective January 1, 2018; adopted effective January 1, 2013.)

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**Rule 5 – Family Law
PART TWO: Settlement Conferences and Trials**

5.11 EVIDENTIARY HEARINGS AND TRIALS

a. **MEET AND CONFER REQUIREMENTS**

The meet and confer requirements set forth in California Rules of Court, rule 5.98, shall also apply to all evidentiary hearings and trials.

(Subd (a) adopted effective January 1, 2013.)

b. **VACATING OR CONTINUING AN EVIDENTIARY HEARING OR TRIAL DATE**

An evidentiary hearing or trial may be vacated or continued only by court permission obtained pursuant to stipulation by the parties, by order after a noticed request, or upon the court’s own motion.

If the evidentiary hearing or trial is continued at a party’s request or by stipulation, the current fee charged for such continuances shall be paid prior to or concurrently with the filing of the order continuing the trial or evidentiary hearing.

(Subd (b) adopted effective January 1, 2013.)

c. **DOCUMENTARY EVIDENCE**

The parties shall bring to trial a sufficient number of copies of all evidence such that a copy can be provided to all opposing parties and the court. Except for evidence to be used solely for impeachment (e.g. to directly attack the credibility of a party or witness), copies of all evidence shall be exchanged with all other parties prior to the commencement of the trial.

So far as is practicable, all parties must have their respective exhibits (except those to be used solely for impeachment) marked by the courtroom clerk before the time scheduled for trial to start, unless excused by the assigned judicial officer.

(Subd (c) adopted effective January 1, 2013.)

(Rule 5.11 adopted effective January 1, 2013.)

5.12 – 5.19 [RESERVED]

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**Rule 5 – Family Law
PART THREE: Child Custody and Visitation**

5.20 CHILD CUSTODY RECOMMENDING COUNSELING

a. **PARTIES’ DUTIES**

In all proceedings and actions where there is an initial contested issue regarding the custody of or visitation with a minor child, the matter shall be set for child custody recommending counseling through Family Court Services. The custody counseling shall be completed and a report issued by the child custody recommending counselor before the court hears the matter. Emergency hearings for temporary orders pending the hearing are exempt from this rule.

If a party does not appear for the hearing and there is satisfactory proof in the court file that the non-appearing party has notice of the hearing, the counseling session may proceed without the party’s participation or may be excused in the court’s discretion.

(Subd (a) adopted effective January 1, 2013.)

b. **REPORT – FULL AGREEMENT**

Where a full agreement has been reached in the counseling session between the parties regarding the issues of custody and visitation, the child custody recommending counselor shall prepare and forward to the court a written summary of such agreement.

(Subd (b) adopted effective January 1, 2013.)

c. **REPORT – PARTIAL OR NO AGREEMENT**

Where there is not a full agreement between the parties regarding the issues of custody and/or visitation, the child custody recommending counselor shall submit a recommendation to the court regarding custody of and/or visitation with the minor child(ren), per Family Code section 3183. The counselor’s recommendation shall state the factual basis for the recommendation, which may include matters communicated to the counselor by the parties or the minor child(ren). The court may consider the written recommendation of the counselor and the basis for that recommendation in determining the issues before the court at the time of hearing.

(Subd (c) adopted effective January 1, 2013.)

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**d. DISCLOSURE OF CHILD CUSTODY RECOMMENDING COUNSELING REPORT
PROHIBITED**

Any written report or recommendation from a child custody recommending counselor shall be confidential and unavailable to any person except the court, the parties, their attorneys and the attorneys' employees or agents, the parties' experts, licensed family counselors professionally involved with the case, the minor child's attorney, and any person to whom the court expressly grants access by written order made with prior notice to all parties.

Dissemination of the report to persons other than those identified above is strictly prohibited.

(Subd (d) adopted effective January 1, 2013.)

e. CALLING THE CHILD CUSTODY RECOMMENDING COUNSELOR AS A WITNESS

The child custody recommending counselor may be called as a witness by either party, minor's counsel, or the court, and may testify regarding his or her recommendation and the basis therefore.

A party or attorney calling the counselor as a witness at any hearing must comply with all statutory requirements for compelling a witness' attendance at a hearing or trial, including the payment of witness fees.

(Subd (e) adopted effective January 1, 2013.)

f. GRIEVANCE PROCEDURE

The procedure for processing a complaint concerning a Family Court Services child custody recommending counselor shall be as follows:

- (1) Complaints are only accepted from the following individuals:
 - (a) A party to the action;
 - (b) A party's attorney; or
 - (c) The court-appointed attorney for the minor child.

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PART THREE: Child Custody and Visitation**

- (2) The complainant must submit his or her complaint in writing with the Operations Manager for the Family Law Division.
- (3) The written complaint must include the following information:
 - (a) The names of the parties in the case and their attorneys;
 - (b) The family law case number;
 - (c) The most recent court date and the date(s) on which the parties met with the counselor;
 - (d) The name(s) of any Family Court Services personnel (i.e. child custody recommending counselors) with whom the complainant had contact; and,
 - (e) A statement explaining the reasons for the complaint. Mere disagreement with a child custody recommending counselor's recommendation(s) or stated reasons for a recommendation is not a sufficient basis for the court or any other program manager to take action on the grievance, and such a complaint may be summarily dismissed without further investigation or action.
- (4) Persons making complaints should be aware that all information contained in the complaint will be made available to all parties and the counselor(s) involved in the case.
- (5) The Operations Manager will conduct an investigation of the matter, which will include consultation with the child custody recommending counselor. The complainant will be informed in writing of the results of the Operations Manager's investigation within 30 days of the submission of the complaint.
- (5) Nothing precludes the complainant from bringing his or her concerns to the court through a noticed motion.

(Subd (f) amended effective January 1, 2018; adopted effective January 1, 2013.)

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PART THREE: Child Custody and Visitation**

g. PEREMPTORY CHALLENGE AGAINST FAMILY COURT SERVICES CHILD CUSTODY RECOMMENDING COUNSELOR

There shall be no “peremptory challenges” of the assigned Family Court Services child custody recommending counselor.

(Subd (g) adopted effective January 1, 2013.)

h. EX PARTE COMMUNICATIONS WITH CHILD CUSTODY RECOMMENDING COUNSELOR

Ex parte communication between any party or any attorney and the Family Court Services child custody recommending counselor is prohibited, unless authorized by the court or unless the child’s or a party’s physical safety is subject to imminent risk of harm or danger.

(Subd (h) adopted effective January 1, 2013.)

(Rule 5.20 amended effective January 1, 2018; adopted effective January 1, 2013.)

5.21 CHILD CUSTODY AND VISITATION EVALUATIONS

a. CONTACT WITH EVALUATOR IN CHILD CUSTODY PROCEEDINGS

All ex parte communications between court-appointed or court-connected evaluators and parties or their attorneys are prohibited, except as provided by law or court order. (A "court-connected evaluator" is a superior court employee or a person under contract with a superior court who conducts child custody evaluations. CRC 5.225(b)(7).) The court may order sanctions for violation of this no-contact rule, which may include but not be limited to evidence or issue or monetary sanctions, or suppression and sealing of the evaluator’s report and the conduct of a new evaluation or investigation at the sole expense of the offending party.

(Subd (a) adopted effective January 1, 2013.)

b. SANCTIONS FOR UNAUTHORIZED ACCESS TO EVALUATOR’S REPORT

Disclosure of the report is governed by Family Code section 3111. If any person entitled by law or court order to have access to the report discloses the report to

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unauthorized individuals or the minor child, the court may impose sanctions against that person.

(Subd (b) adopted effective January 1, 2013.)

c. GRIEVANCE PROCEDURE – EVALUATORS

The procedure for processing a complaint concerning a court-appointed or court-connected evaluator shall be as follows:

- (1) If the complaint involves the cost or administration of the evaluation or investigation process, then the complainant shall attempt to resolve the matter with the evaluator before pursuing his or her complaint as provided in this rule. All such attempts at resolution shall comply with court orders and all applicable laws. All other complaints shall be made as presented in subpart 3 of this rule, below.
- (2) Except upon a showing of extraordinary circumstances, complaints about the performance of an evaluator or investigator shall be addressed after issuance of the evaluation or investigation report.
- (3) Written notice of a complaint, specifying the conduct objected to, shall be provided to the evaluator or investigator, the other party, and the attorney for the minor child, and shall be lodged with the court by direct delivery to the judicial officer, within 20 days after issuance of the evaluation report. Mere disagreement with an evaluator's or investigator's recommendation(s) or stated reasons is not a sufficient basis for the court or any program manager to take action on the grievance, and such a complaint may be summarily denied without further investigation.
- (4) A written response from the evaluator or investigator (and from the other party and/or the attorney for the minor child, at their respective election) shall be provided to both parties and the attorney for the minor child, and shall be lodged with the court, no later than 10 days after the complaint was provided to the evaluator or investigator, the other party, the minor child's attorney, and the court.
- (5) Within 10 days after receipt of the evaluator's or investigator's response, or if there is no response from the evaluator or investigator, within 20 days after receiving the original complaint, the court shall issue a written

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statement as to what action, if any, it deems appropriate to deal with the complaint.

- (6) If either party or attorney for a minor is not satisfied with the court’s determination, he or she may file a noticed motion requesting other specified relief. Such motion shall be in compliance with Code of Civil Procedure section 1005 and shall be served on the other parties, the attorney for the minor child, and the evaluator or investigator. The evaluator or investigator shall appear at the hearing. The cost of the evaluator’s or investigator’s appearance shall be advanced by the complainant, with the court reserving jurisdiction over the allocation of such cost.

(Subd (c) adopted effective January 1, 2013.)

d. PEREMPTORY CHALLENGE AGAINST EVALUATOR

There shall be no “peremptory challenges” of the appointed evaluator.

(Subd (d) adopted effective January 1, 2013.)

e. EVALUATOR’S PETITION FOR WITHDRAWAL FROM A CASE

A private evaluator shall have the right to petition for withdrawal from a case to which he or she has been appointed. Such petition shall demonstrate good cause for the withdrawal request. The petition shall be filed and served in compliance with Code of Civil Procedure section 1005.

(Subd (e) adopted effective January 1, 2013.)

(Rule 5.21 adopted effective January 1, 2013.)

5.22 MINOR’S COUNSEL

a. GRIEVANCE PROCEDURE

In a family law proceeding in which the court has appointed counsel for a minor child or children, any party, counsel for a party, or minor child may submit a complaint about the performance of appointed counsel. The complaint must be in writing and served on all counsel and self-represented parties. The original complaint must be delivered to the courtroom clerk for the supervising judge of

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family law and a copy must be delivered to the courtroom clerk of the assigned bench officer in the case. The supervising judge of family law may refer the complaint to the assigned bench officer or handle the matter directly and may do any or all of the following:

- (1) Respond to the complaint;
- (2) Request a written response or written comments;
- (3) Investigate the complaint; and/or;
- (4) Set a hearing on the complaint.

A written response will be provided to the person presenting the complaint and all counsel and self-represented parties, with a copy sent to the assigned bench officer in the case. All material reviewed in connection with responding to the complaint shall be maintained as a confidential record in the court file.

(Subd (a) adopted effective July 1, 2023.)

(Rule 5.21 adopted effective January 1, 2013.)

5.23 – 5.29 [RESERVED]

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Rule 5 – Family Law

PART FOUR: Support, Property Division, Attorney Fees, Costs, and Sanctions

5.30 CALCULATION OF TEMPORARY SPOUSAL OR PARTNER SUPPORT

The court has adopted the Santa Clara guideline for temporary spousal or partner support.

(Rule 5.30 adopted effective January 1, 2013.)

5.31 – 5.39 [RESERVED]

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**Rule 5 – Family Law
PART FIVE: Judgments**

5.40 CALENDARING HEARINGS FOR DEFAULT OR UNCONTESTED JUDGMENTS

Whenever permitted by law, parties are strongly encouraged to submit judgments by affidavit instead of requesting a hearing.

To obtain an uncontested or default judgment through a hearing, the requesting party shall submit a request for a hearing date in writing to the Family Law Clerk’s Office. That request will then be submitted to the assigned judicial officer for calendaring. If the request is granted, a notice of hearing will then be sent to the requesting party.

(Rule 5.40 adopted effective January 1, 2013.)

5.41 DOCUMENTS NEEDED FOR JUDGMENTS FOR LEGAL SEPARATION OR DISSOLUTION OF MARRIAGE OR REGISTERED DOMESTIC PARTNERSHIP

To obtain a judgment of dissolution or legal separation by declaration (without a hearing in court) pursuant to Family Code section 2336, the petitioner shall provide the forms listed in *Judgment Checklist – Dissolution/Legal Separation* (Judicial Council form FL-182) for the situation that pertains to that case (e.g. default without agreement, default with agreement, or uncontested). Documents that have already been filed do not need to be resubmitted.

To obtain a judgment of dissolution of marriage or registered domestic partnership or legal separation through a hearing, the requesting party must submit to the court **at the time the hearing is requested** the documents identified in *Judgment Checklist – Dissolution/Legal Separation* (Judicial Council form FL-182) for the situation that pertains to that case (e.g. default without agreement, default with agreement, or uncontested). Documents that have already been filed do not need to be resubmitted.

(Rule 5.41 adopted effective January 1, 2013.)

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**Rule 5 – Family Law
PART FIVE: Judgments**

5.42 DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

Judgments for nullity of marriage or registered domestic partnership must be set for hearing. They may not be requested by affidavit.

To obtain a judgment of nullity of marriage or registered domestic partnership, the requesting party must submit to the court the documents identified in Appendix 5-A for the situation that pertains to that case (e.g. default without agreement, default with agreement, or uncontested). Documents that have already been filed do not need to be resubmitted.

(Rule 5.42 adopted effective January 1, 2013.)

5.43 DOCUMENTS NEEDED FOR DEFAULT OR UNCONTESTED JUDGMENTS FOR ESTABLISHMENT OF PARENTAL RELATIONSHIP (UPA) OR FOR ESTABLISHMENT OF CUSTODY AND SUPPORT

To obtain a uncontested or default judgment that either establishes the existence or non-existence of a parental relationship or establishes custody and support per Family Code section 3120, the requesting party must submit to the court the documents identified in Appendix 5-B for the situation that pertains to that case (e.g. default without agreement, default with agreement, or uncontested). Documents that have already been filed do not need to be resubmitted.

(Rule 5.43 adopted effective January 1, 2013.)

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**Rule 5 – Family Law
APPENDIX**

5-A: DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

A. DEFAULT WITH NO AGREEMENT (*NO APPEARANCE AND NO AGREEMENT*)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- The petitioner's *Declaration regarding Service of Declaration of Disclosure and Income and Expense Declaration* (141)
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- **If there are children of the relationship**, submit the following:
 1. The petitioner's *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105)
- **If any financial relief is requested (e.g. child support, spousal/partner support, attorney fees)**, submit the following:
 - The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)
 - For attorney fees:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - Either a *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form

The following documents shall be submitted to the court **prior to or at the hearing**:

- *Judgment* (form FL-180), to which is attached:
 1. If child custody is requested:
 - *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. If spousal or partner support is requested:
 - *Spousal, Partner, or Family Support Order Attachment* (form FL-343) or other proposed written order
 4. If attorney fees are requested:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
 5. If property division is requested:
 - *Property Order Attachment to Judgment* (form FL-345) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

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APPENDIX**

5-A: DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

B. DEFAULT WITH AGREEMENT (*NO RESPONSE AND A WRITTEN AGREEMENT*)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- *Declaration regarding Service of Declaration of Disclosure and Income and Expense Declaration* (form FL-141) from both the petitioner and respondent (each party must file a separate form)
- One of the following:
 1. *Declaration Regarding Service of Declaration of Disclosure and Income and Expense Declaration* (form FL-141) from both the petitioner and respondent (each party must file a separate form)
 2. *Stipulation and Waiver of Final Declaration of Disclosure* (form FL-144)
 3. Separately filed waiver or waiver included in a written agreement under Family Code section 2105(d)
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- **If there are children of the relationship**, submit the following:
 1. The petitioner's *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105)
- **If any financial relief is requested (e.g. child support, spousal/partner support, attorney fees)**, submit the following:
 1. The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)
 2. The respondent's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)
 3. For attorney fees:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - A *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form

The following documents shall be submitted to the court **prior to or at the hearing**:

- *Judgment* (form FL-180), to which is attached:
 1. If child custody is requested:
 - *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. If spousal or partner support is requested:
 - *Spousal, Partner, or Family Support Order Attachment* (form FL-343) or other proposed written order
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5-A: DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

4. If attorney fees are requested:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
5. If property division is requested:
 - *Property Order Attachment to Judgment* (form FL-345) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

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APPENDIX**

5-A: DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

C. UNCONTESTED CASE (*APPEARANCE BY RESPONDENT AND A WRITTEN AGREEMENT*)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- *Declaration regarding Service of Declaration of Disclosure and Income and Expense Declaration* (form FL-141) from both the petitioner and respondent (each party must file a separate form)
- One of the following:
 1. *Declaration Regarding Service of Declaration of Disclosure and Income and Expense Declaration* (form FL 141) from both the petitioner and respondent (each party must file a separate form)
 2. *Stipulation and Waiver of Final Declaration of Disclosure* (form FL-144)
 3. Separately filed waiver or waiver included in a written agreement under Family Code section 2105(d)
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- **If there are children of the relationship**, submit the following:
 1. The petitioner's *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105)
- **If any financial relief is requested (e.g. child support, spousal/partner support, attorney fees)**, submit the following:
 1. The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)
 2. The respondent's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)
 3. For attorney fees:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - A *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form

The following documents shall be submitted to the court **prior to or at the hearing**:

- *Judgment* (form FL-180), to which is attached:
 1. If child custody is requested:
 - *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. If spousal or partner support is requested:
 - *Spousal, Partner, or Family Support Order Attachment* (form FL-343) or other proposed written order
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5-A: DOCUMENTS NEEDED FOR JUDGMENTS OF NULLITY

4. If attorney fees are requested:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
5. If property division is requested:
 - *Property Order Attachment to Judgment* (form FL-345) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

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**5-B: DOCUMENTS NEEDED FOR DEFAULT OR UNCONTESTED JUDGMENTS FOR ESTABLISHMENT OF
PARENTAL RELATIONSHIP (UPA) OR FOR ESTABLISHMENT OF CUSTODY AND SUPPORT PER FAMILY CODE
§3120**

A. DEFAULT WITH NO AGREEMENT (*NO RESPONSE AND NO AGREEMENT*)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested or at the time the judgment by declaration is submitted**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- The petitioner's *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105)
- **If proceeding without a hearing**, submit a *Declaration for Default or Uncontested Judgment* (form FL-230), to which is attached:
 1. The petitioner's *Advisement and Waiver of Rights Re: Establishment of Parental Relationship* (form FL-235)
 2. If attorney fees are requested:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - Either a *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form
- **If either child support or attorney fees are requested**, submit the following:
 1. The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)

The following documents shall be submitted to the court **prior to or at the hearing or at the time the judgment by declaration is submitted**:

- *Judgment* (form FL-250), to which is attached:
 1. *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. **If attorney fees are requested**:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

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5-B: DOCUMENTS NEEDED FOR DEFAULT OR UNCONTESTED JUDGMENTS FOR ESTABLISHMENT OF PARENTAL RELATIONSHIP (UPA) OR FOR ESTABLISHMENT OF CUSTODY AND SUPPORT PER FAMILY CODE §3120

B. DEFAULT WITH AGREEMENT (*NO RESPONSE AND A WRITTEN AGREEMENT*)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested or at the time the judgment by declaration is submitted**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- The petitioner's *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105)
- **If proceeding without a hearing**, submit a *Declaration for Default or Uncontested Judgment* (form FL-230), to which is attached:
 1. The petitioner's *Advisement and Waiver of Rights Re: Establishment of Parental Relationship* (form FL-235)
 2. The respondent's *Advisement and Waiver of Rights Re: Establishment of Parental Relationship* (form FL-235)
 3. If attorney fees are requested:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - Either a *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form
- **If either child support or attorney fees are requested**, submit the following:
 1. The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)

The following documents shall be submitted to the court **prior to or at the hearing or at the time the judgment by declaration is submitted**:

- *Judgment* (form FL-250), to which is attached:
 1. *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. *If attorney fees are requested*:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

**Superior Court of California
County of Solano**

**Rule 5 – Family Law
APPENDIX**

**5-B: DOCUMENTS NEEDED FOR DEFAULT OR UNCONTESTED JUDGMENTS FOR ESTABLISHMENT OF
PARENTAL RELATIONSHIP (UPA) OR FOR ESTABLISHMENT OF CUSTODY AND SUPPORT PER FAMILY CODE
§3120**

C. UNCONTESTED (APPEARANCE BY THE RESPONDENT AND A WRITTEN AGREEMENT)

Unless already on file, the following documents shall be submitted to the court **at the time the hearing is requested or at the time the judgment by declaration is submitted**:

- *Proof of Service of Summons* (form FL-115) or other proof of service
- *Request to Enter Default* (form FL-165), with a stamped envelope addressed to the respondent and the court clerk's address as the return address
- *Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA)* (form FL-105) from both the petitioner and respondent (a separate form must be filed by each party)
- *Stipulation for Entry of Judgment Re: Establishment of Parental Relationship* (form FL-240)
- **If proceeding without a hearing**, submit a *Declaration for Default or Uncontested Judgment* (form FL-230), to which is attached:
 1. *Advisement and Waiver of Rights Re: Establishment of Parental Relationship* (form FL-235) from both the petitioner and the respondent (a separate form must be signed by each party)
 2. If attorney fees are requested:
 - A *Request for Attorney Fees and Costs* (form FL-319) or a comparable declaration that addresses the factors covered in the *Request for Attorney Fees and Costs* form, **and**,
 - Either a *Supporting Declaration for Attorney's Fees and Costs Attachment* (form FL-158) or a comparable declaration that addresses the factors covered in the *Supporting Declaration for Attorney's Fees and Costs Attachment* form
- **If either child support or attorney fees are requested**, submit the following:
 1. The petitioner's current *Income and Expense Declaration* (form FL-150) **OR** *Financial Statement (Simplified)* (form FL-155)

The following documents shall be submitted to the court **prior to or at the hearing or at the time the judgment by declaration is submitted**:

- *Judgment* (form FL-250), to which is attached:
 1. *Child Custody and Visitation (Parenting Time) Order Attachment* (form FL-341) **OR** other proposed written order containing the information required by Family Code 3048(a)
 2. If child support is requested:
 - *Child Support Information and Order Attachment* (form FL-342)
 - *Notice of Rights and Responsibilities and Information Sheet on Changing a Child Support Order* (form FL-192)
 3. *If attorney fees are requested*:
 - *Attorney Fees and Costs Order Attachment* (form FL-346) or other proposed written order
- *Notice of Entry of Judgment* (form FL-190)
- 2 stamped envelopes large enough to return the *Judgment* and *Notice of Entry of Judgment*, with one envelope addressed to petitioner and the other to respondent.

**Superior Court of California
County of Solano**

Rule 5 – Family Law

APPENDIX

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BY S/ones
DEPUTY CLERK

1
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5 **IN THE SUPERIOR COURT OF CALIFORNIA**
6 **IN AND FOR THE COUNTY OF SOLANO**
7

8 In Re: All Matters Involving the Solano County
9 Department of Child Support Services

Standing Order No. 2015-001-FL

10 **STANDING ORDER**
11 **INCORPORATING SOLANO COUNTY**
12 **DCSS ADDITIONAL ORDERS INTO**
13 **ALL SOLANO COUNTY DCSS**
14 **JUDGMENTS AND ORDERS**

15 **TO ALL PARTIES IN MATTERS INVOLVING THE SOLANO COUNTY**
16 **DEPARTMENT OF CHILD SUPPORT SERVICES:**

17 1. Whereas the Solano County Department of Child Support Services (“DCSS”) has a set
18 of standard orders routinely included in its petitions, orders, and judgments;

19 2. Whereas recent changes to the formatting and method of filing of petitions, orders, and
20 judgments do not provide space for the inclusion of said standard orders; and,

21 3. Good cause exists to continue including such standard orders in future petitions, orders,
22 and judgments;

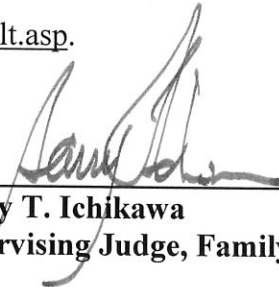
23 **IT IS HEREBY ORDERED:**

24 1. Effective August 1, 2015, the Solano County Department of Child Support Services
25 standard orders shall be incorporated by reference as orders of this court in all judgments and
orders made in proceedings where the Solano County Department of Child Support Services is

1 a party or a substitute payee and where the inclusion of such orders was requested in a petition
2 (including any amended petitions), supplemental complaint(s), or in a *Request for Order*.
3 Petitions, supplemental complaints, or *Request for Order* forms filed on or after August 1, 2015
4 shall include the website where the standing orders may be accessed by the public. All orders
5 and judgments filed on or after August 1, 2015 shall include the website where the standing
6 orders may be accessed by the public.

7 2. The Solano County Department of Child Support Services shall post a copy of this
8 Order and a copy of said Standard Orders on the Solano County Department of Child support
9 website: www.solanocounty.com/depts/dcss/default.asp.

10
11 Date: July 31, 2015

12 
13 _____
14 **Garry T. Ichikawa**
15 **Supervising Judge, Family Law Division**

**Superior Court of California
County of Solano**



**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

6.1 ADOPTION, CONSTRUCTION AND AMENDMENT OF RULES AND STANDING ORDERS

a. APPLICABILITY OF RULES

Unless otherwise stated in a particular rule, Rule 6 shall apply to all matters heard pursuant to Welfare and Institutions Code sections 300, 601, or 602

(Subd (a) amended effective January 1, 2010; adopted effective August 1, 2002; previously amended effective August 3, 2007, and July 1, 2008.)

b. STANDING ORDERS

The Presiding Judge of the Juvenile Division may issue such standing orders for the administration of the Juvenile Court, as the court deems appropriate. The court may issue new or amended standing orders by filing the same with the clerk of the court and posting the order for a period of thirty (30) days outside of the juvenile courtrooms and the clerk’s office.

(Subd (b) amended and relettered effective January 1, 2010; adopted as subdivision (c) of Rule 6.1.1 effective August 1, 2002; previously amended effective July 1, 2008.)

(Rule 6.1 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.1 effective August 1, 2002; previously amended effective August 3, 2007, and July 1, 2008.)

6.2 ASSIGNMENT OF JUDICIAL OFFICER; JUVENILE CALENDAR

a. ASSIGNMENT OF JUDICIAL OFFICER FOR ALL PURPOSES

When a juvenile case is filed, or received and filed as a transfer from another jurisdiction, the Clerk of the Court shall assign the case to one judicial officer for all purposes, as directed by and subject to the approval of the Presiding Judge of the Juvenile Division. The assignment shall be designed to fairly distribute the workload among the judicial officers of the Juvenile Division and best serve the court.

(Subd (a) adopted effective July 1, 2012.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

b. JUVENILE CALENDAR

All juvenile matters will be heard by the Juvenile Court on such days and such times as scheduled or approved by the Juvenile Presiding Judge.

(Subd (b) relettered effective July 1, 2012; adopted as unlettered portion of Rule 6.1.2 effective August 1, 2002; previously amended effective July 1, 2008; amended and renumbered effective January 1, 2010.)

(Rule 6.2 amended effective July 1, 2012; adopted as Rule 6.1.2 effective August 1, 2002; previously amended effective July 1, 2008; amended and renumbered effective January 1, 2010.)

6.3 ACCESS TO COURTROOM BY NON-PARTIES

Unless specifically permitted by statute, Juvenile Court proceedings are confidential and shall not be open to the general public. The court encourages interested persons including trainees and students to attend juvenile proceedings in order to better understand the workings of the Juvenile Court. The court retains the discretion to determine in each case whether any such interested party shall remain in the courtroom.

(Rule 6.3 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.3 effective August 1, 2002.)

6.4 CONFIDENTIALITY

All participants or permitted observers in Juvenile Court proceedings shall maintain the confidentiality of Juvenile Court documents and proceedings. Juvenile records may not be copied or disseminated outside of the juvenile proceedings without a court order. An intentional violation of these confidentiality provisions is a misdemeanor punishable by fine, imprisonment or both, and/or punishable as a contempt of court. [W&I § 827(b)(2)]

(Rule 6.4 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.4 effective August 1, 2002; previously amended effective July 1, 2008.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

6.5 RELEASE OF INFORMATION RELATING TO JUVENILES

a. DISCOVERY OF JUVENILE RECORDS

Except as indicated within this rule, in all cases in which a person or agency seeks access to Juvenile Court records, including records maintained by the Juvenile Court Clerk, the Probation Department, or the Health and Social Services Department – Child Welfare Services Division, the person or agency shall file a Petition for Disclosure (Judicial Council form JV-570) [W&I § 827(a)(2)(A)] with the Presiding Judge or a judicial officer of the Juvenile Court. The petition shall set forth with specificity the materials sought and the relevance of the materials to the underlying action. The petition shall be supported by a declaration which specifies the information or documents sought, the purpose for which the documents or information is sought, the relevance of the documents or information to the purpose for which they are sought, and, if necessary, a memorandum of points and authorities. The Juvenile Court Clerk shall not accept facsimile copies of Section 827 petitions for filing. This section does not apply to those persons and agencies designated by Welfare and Institutions Code section 827(a) or any party authorized to obtain records by a standing order issued by this court.

(Subd (a) amended and subd (1) through (3) deleted effective January 1, 2010; adopted effective August 1, 2002; previously amended effective July 1, 2008.)

b. RELEASE OF RECORDS TO PARTIES AND THEIR ATTORNEYS

Any party, their attorney, or authorized agent in any Welfare and Institutions Code §§300, 601 or 602 matter shall be given access to all records relating to the child which are held by the Clerk of the Court unless otherwise specifically ordered by the court. The party or counsel shall also have the right to secure copies of such records. The party or counsel shall be responsible for the cost of any copying. Any person requesting records shall complete the form adopted or approved by the court for this purpose. A copy of the request shall be filed in the court file.

(Subd (b) amended effective January 1, 2010; adopted as subd (f) effective August 1, 2002; previously amended and relettered effective July 1, 2008.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

c. RELEASE OF COURT REPORTS TO COURT-APPROVED MENTAL HEALTH EVALUATORS

Where the court has ordered a mental health or psychological evaluation of a minor, the court approved evaluator shall be given access to the court’s file, unless the court makes a specific order to the contrary in the referral.

(Subd (c) amended and relettered effective July 1, 2008; adopted as subd (g) effective August 1, 2002.)

(Rule 6.5 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.5 effective August 1, 2002; previously amended effective July 1, 2008.)

6.6 DISCOVERY

a. INFORMAL DISCOVERY

Discovery shall be conducted informally. Except as protected by privilege, all relevant material shall be disclosed in a timely fashion to all parties to the litigation.

(Subd (a) adopted effective August 1, 2002.)

b. FORMAL DISCOVERY

If all informal means of discovery have been exhausted, a party may petition the court for discovery. Any noticed motion shall state the relevancy and materiality of the information sought and the reasons why informal discovery was not adequate to secure that information. The motion shall be served on all parties at least five (5) court days before the hearing date. The date for the hearing shall be obtained from the Juvenile Court clerk. A copy shall be served on the court before whom the matter is scheduled to be heard. Any responsive papers shall be filed and served in like manner two (2) court days prior to the hearing.

(Subd (b) amended effective January 1, 2010; adopted effective August 1, 2002.)

(Rule 6.6 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.7 effective August 1, 2002; renumbered as Rule 6.1.6 effective July 1, 2008.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

6.7 PETITIONS, PLEADINGS & MOTIONS

a. FORMAT OF PETITIONS, PLEADINGS AND MOTIONS

All petitions, pleadings and motions filed with the Juvenile Court must be in a format approved by the court. All petitions, pleadings and motions must be reviewed and signed by the attorney of record for the party where the party is represented by counsel. Counsel are responsible for ensuring the legal sufficiency of the document and compliance with procedural requirements.

(Subd (a) relettered effective January 1, 2010; adopted as unlettered portion of Rule 6.1.8 effective August 1, 2002; former subd (a) repealed effective January 1, 2010.)

b. EX PARTE APPLICATIONS

All ex parte applications shall be in writing and the party making the applications shall provide notice to all counsel at least one court day prior to the hearing.

(Subd (b) amended effective January 1, 2010; adopted as subd (e) effective August 1, 2002; amended and relettered effective July 1, 2008.)

c. NOTICES OF UNAVAILABILITY

The court shall not accept for filing a "Notice of Unavailability of Counsel" or other document or pleading whose sole purpose is to advise the court and/or other parties of an attorney's or party's unavailability. *Carl v. Superior Court of Orange County* (2007) 157 Cal.App.4th 73.

(Subd (c) adopted effective January 1, 2009.)

(Rule 6.7 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.8 effective August 1, 2002; previously amended and renumbered as Rule 6.1.7 effective July 1, 2008; previously amended effective January 1, 2009.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART ONE: Rules for Juvenile Court in General

6.8 REQUEST FOR TRANSCRIPTS BY NON-PARTY

Any non-party requesting a reporter’s transcript of a juvenile proceeding must file a Petition for Disclosure (Judicial Council form no. 570).

(Rule 6.8 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.11 effective August 1, 2002; previously renumbered as Rule 6.1.10 effective July 1, 2008.)

6.9 WELFARE AND INSTITUTIONS CODE SECTION 241.1 ASSESSMENTS

Any party requesting a Welfare and Institutions Code section 241.1 hearing may submit a written declaration providing specific facts supporting the party’s assertion that the minor comes within the description of a person subject to both Welfare & Institutions Code section 300 and either Section 601 or 602. The Probation Department and Child Welfare Services shall prepare an assessment report in accordance with the protocol established by Welfare and Institutions Code section 241.1, subdivision (b). The report shall provide the sources of the factual information upon which the recommendations of the respective departments are based.

(Rule 6.9 amended and renumbered effective January 1, 2010; adopted as Rule 6.1.15 effective August 1, 2002; previously amended and renumbered as Rule 6.1.11 effective July 1, 2008.)

6.10 MOTION TO CHALLENGE LEGAL SUFFICIENCY OF PETITION

a. TIMING OF THE MOTION

A motion to challenge the legal sufficiency of the petition may be made orally or in writing at the initial/detention hearing, or at the jurisdictional hearing. A party may object on the ground that the petition alleges facts which, even if determined to be true, either are not sufficient to state a cause of action, or are not stated with sufficient clarity and precision to enable the party to determine what must be defended against. The court may entertain the objection by oral argument when made, or may set it for further hearing. No objection in the nature of a special demurrer to particular allegation shall lie to challenge only certain paragraphs under a particular subdivision of Welfare & Institutions Code section 300 (i.e. a party must challenge all allegations under Section 300(b), not merely certain allegations.)

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PART ONE: Rules for Juvenile Court in General

(Subd (a) amended effective January 1, 2010; previously adopted as subd (a) of Rule 6.2.5 effective August 1, 2002.)

b. HEARING ON MOTION; MEMORANDA OF POINTS AND AUTHORITIES

If the court sets a hearing on the objection, counsel for the objecting party may file a supporting memorandum of points and authorities. To be considered timely, the memorandum must be filed at least 48 hours before the hearing in the department where the hearing is scheduled. The petitioner may file a memorandum of points and authorities in opposition to the objection. To be considered timely, the memorandum in opposition must be filed by 8:30 a.m. on the day of the hearing, in the department where the matter is set for hearing. All memoranda of points and authorities, whether in support of or in opposition to the objection, must be served on all other counsel and the petitioner via facsimile or personal service.

(Subd (b) amended effective January 1, 2010; previously adopted as subd (b) of Rule 6.2.5 effective July 1, 2008.)

c. AMENDING THE PETITION

Petitioner may not amend the petition without leave of court once a written objection to the sufficiency of the petition has been filed.

(Subd (c) amended effective January 1, 2010; previously adopted as subd (c) of Rule 6.2.5 effective July 1, 2008.)

d. OBJECTION OVERRULED

If an objection to the sufficiency of a petition is overruled and no admission or denial has been entered, the Court shall allow the admission or denial to be entered at the conclusion of the hearing, or upon such terms as may be just.

(Subd (d) amended effective January 1, 2010; previously adopted as subd (d) of Rule 6.2.5 effective July 1, 2008.)

e. OBJECTION SUSTAINED

If the Court sustains the objection to the sufficiency of a petition, the Court may grant leave to amend the petition upon any terms as may be just and shall fix the

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time within which the amended petition shall be filed. During the time that the petition is being amended, the minor may continue to be detained if the Court finds that a prima facie case for detention exists.

(Subd (e) amended effective January 1, 2010; adopted as unlettered portion of Rule 6.2.8 effective August 1, 2002; amended and relettered as Subd (e) effective July 1, 2008.)

(Rule 6.10 adopted effective January 1, 2010.)

6.11 – 6.29 [Reserved]

**Superior Court of California
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Rule 6 – Juvenile Proceedings

PART TWO: Juvenile Dependency

6.30 APPOINTED COUNSEL IN DEPENDENCY PROCEEDINGS

a. MINIMUM STANDARDS OF COMPETENCE

All attorneys seeking appointment in juvenile dependency proceedings must meet the minimum standards of competence set forth in California Rules of Court, rule 5.660(d).

(Subd (a) amended and relettered effective January 1, 2010; adopted as unlettered portion of Rule 6.2.1 effective August 1, 2002.)

b. INITIAL APPLICATION TO PRACTICE IN THE JUVENILE COURT

An attorney seeking to practice before the Juvenile Court in dependency matters shall submit an *Application to Practice* (Solano County Local Form no. 6000) to the Presiding Judge of the Juvenile Court.

(Subd (b) adopted effective January 1, 2010.)

c. RENEWAL APPLICATION TO PRACTICE IN THE JUVENILE COURT

A *Renewal Application to Practice* (Solano County Local Form no. 6001) before the Juvenile Court must be submitted to the court by January 30 in the year immediately following the two (2) year anniversary of the submission of the original *Application to Practice*. Those attorneys who submitted their original application in January shall file their renewal application by January 30 of the second year following the submission of the original *Application to Practice*. The attorney shall attach to the renewal application evidence that he or she completed at least eight (8) hours of continuing training or education directly related to dependency proceedings since the last application. This evidence may include a certificate of attendance at MCLE training, professional organization training (along with a copy of the program schedule) and/or attendance at court-sponsored or approved training.

Failure to supply proof of completion of continuing education or training by the due date will cause the court to notify the attorney that his or her right to be appointed in dependency proceedings will be revoked. The attorney shall have thirty (30) days from mailing of notice to submit proof of completion of the required

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education or training. If the attorney fails to submit such proof, the court will not recommend further appointments until such time as the requisite proof is provided.

(Subd (a) amended and relettered effective July 1, 2008; adopted as subd (c) effective August 1, 2002.)

(Rule 6.30 amended and renumbered effective January 1, 2010; adopted as Rule 6.2.1 effective August 1, 2002; previously amended effective July 1, 2008.)

6.31 APPOINTMENT OF PRIVATE COUNSEL IN DEPENDENCY PROCEEDINGS

a. ELIGIBILITY FOR APPOINTMENT

The court will appoint only counsel who has submitted the application required by these rules and have been certified by the court to represent parents or children in the dependency court.

(Subd (a) amended effective July 1, 2008; adopted effective August 1, 2002)

b. NOTIFICATION OF APPOINTMENT

Notification of appointment may be communicated by phone call and confirmed by appropriate written order or minute order.

(Subd (b) amended effective July 1, 2008; adopted effective August 1, 2002.)

c. COMPENSATION

Billing shall be forwarded to the court on appropriate forms with documentation for approval.

(Subd (c) adopted effective August 1, 2002.)

(Rule 6.31 renumbered effective January 1, 2010; adopted as Rule 6.2.2 effective August 1, 2002; previously amended effective July 1, 2008..)

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County of Solano**

Rule 6 – Juvenile Proceedings

PART TWO: Juvenile Dependency

6.32 PROCEDURES FOR REVIEWING AND RESOLVING COMPLAINTS REGARDING REPRESENTATION IN DEPENDENCY PROCEEDINGS

a. WHO MAY LODGE A COMPLAINT

Any party to a Juvenile Court dependency proceeding may lodge a written complaint with the court concerning the performance of the party's appointed attorney in that proceeding. In the case of a complaint concerning the performance of an attorney appointed to represent a minor, the complaint may be lodged either by the minor or on the minor's behalf by the social worker, a caretaker relative or a foster parent.

(Subd (a) amended effective July 1, 2008; adopted effective August 1, 2002.)

b. PROCEDURE

(1) Upon receipt of a written complaint, the court shall notify the attorney in question of the complaint, shall provide the attorney with a copy of the complaint, and shall give the attorney fifteen days from the date of the notice to respond to the complaint in writing.

(Subd (1) renumbered effective January 1, 2010; adopted as portion of subd (b) effective August 1, 2002.)

(2) After a response has been filed by the attorney or the time for the submission of a response has passed, the court shall review the complaint and the response, if any, to determine whether the attorney acted contrary to local rules or policies or has acted incompetently. The court may ask the complainant or the attorney for additional information prior to making a determination on the complaint.

(Subd (2) renumbered effective January 1, 2010; adopted as subd (c) effective August 1, 2002.)

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- (3) If, after reviewing the complaint, the response, and any additional information, the court, either in writing or at oral hearing, finds that the attorney acted contrary to the rules or policies of the court or incompetently, the court shall take appropriate action.

(Subd (3) renumbered effective January 1, 2010; adopted as subd (d) effective August 1, 2002.)

- (4) The court shall notify the attorney and complaining party either in writing or by oral ruling at a closed hearing of its determination of the complaint. The court's determination will be final.

(Subd (4) renumbered effective January 1, 2010; adopted as subd (e) effective August 1, 2002.)

(Subd (b) amended effective January 1, 2010; adopted effective August 1, 2002.)

(Rule 6.32 amended and renumbered effective January 1, 2010; adopted as Rule 6.2.4 effective August 1, 2002; amended and renumbered as Rule 6.2.3 effective July 1, 2008.)

6.33 PROCEDURES FOR INFORMING THE COURT OF THE INTERESTS OF A DEPENDENT CHILD [CRC 5.660]

a. NOTIFICATION TO THE COURT

At any time during the pendency of a dependency proceeding, any interested person may notify the court that the minor who is the subject of the proceeding may have an interest or right which needs to be protected or pursued in another judicial or administrative forum. Notice to the court may be given by the filing of filing a verified petition or notice of motion specifying the right or interest to be protected. The person giving notice shall set forth the nature of the interests or right which needs to be protected or pursued, the name and address, if known, of the administrative agency or judicial forum in which the right or interest may be affected and the nature or the proceedings being contemplated or conducted there.

(Subd (a) amended effective January 1, 2010; adopted effective August 1, 2002.)

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- b. If the court determines that further action on behalf of the child is required, the court shall do one or more of the following:
- (1) Authorize the minor’s attorney to pursue the matter on the child’s behalf;
 - (2) Appoint an attorney for the child if the child is unrepresented;
 - (3) Notice a joinder hearing pursuant to Section 362(a) compelling the responsible agency to report to the court with respect to whether it has carried out its statutory duties with respect to the child;
 - (4) Appoint a guardian ad litem for the child for the purposes of initiating or pursuing appropriate action in the other forum(s);
 - (5) Take any other action the court may deem necessary or appropriate to protect the welfare, interests and rights of the child.

(Subd (b) amended and relettered effective January 1, 2010; adopted as subd (c) effective August 1, 2002.)

(Rule 6.33 amended and renumbered effective January 1, 2010; adopted as Rule 6.2.5 effective August 1, 2002; amended and renumbered as Rule 6.2.4 effective July 1, 2008.)

6.34 ACCESS TO MINORS

a. **ACCESS TO MINORS PETITIONED PURSUANT TO W& I § 300**

No party or attorney in a dependency proceeding shall interview the minor about the events relating to the allegations in the petition(s) on file without permission of the minor’s attorney or court order. No party or attorney in a dependency proceeding shall cause the minor to undergo physical, medical or mental health examination or evaluation without court approval. This rule does not apply to the investigating social worker prior to the establishment of jurisdiction.

(Subd (a) amended and relettered effective July 1, 2008; adopted as subd (b) effective August 1, 2002.)

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PART TWO: Juvenile Dependency

b. INTERVIEWING MINORS WHO ARE ALLEGED VICTIMS OF CHILD SEXUAL ABUSE

In all dependency matters where there are allegations of child sexual abuse, all participants and their counsel shall minimize the number of interviews they take of the minor relating to the events surrounding the alleged abuse.

(Subd (b) amended and relettered effective July 1, 2008; adopted as Subd (c) effective August 1, 2002.)

(Rule 6.35 amended and renumbered effective January 1, 2010; adopted as Rule 6.2.10 effective August 1, 2002; previously amended and renumbered as Rule 6.2.6 effective July 1, 2008.)

6.35 MODIFICATIONS OF ORDERS

a. VACATIONS OUT OF SOLANO COUNTY

Permission for a dependent child’s custodian to take the child out of Solano County for a vacation may be submitted directly to the Court for approval at least five court days prior to departure. Any attempts to notify the parents and the parents’ position on the request shall be indicated in the application.

(Subd (a) relettered effective July 1, 2008; adopted as Subd (e) effective August 1, 2002.)

b. NEW SERVICE PLAN REQUIREMENTS

Any significant changes or additions to the service plan for parents or guardians shall be submitted to them for approval before implementation. A parent or guardian who disagrees with the new requirements may request a hearing with the Court on the matter.

(Subd (b) amended effective January 1, 2010; adopted as Subd (f) effective August 1, 2002; relettered effective July 1, 2008.)

c. NOTICE RE CHANGE IN PLACEMENT

In order to ensure that proper notice is received by attorneys for parents and children of any change in a child’s placement after the original dispositional hearing:

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PART TWO: Juvenile Dependency

- (1) In non-emergency situations, the Department shall give notice at least three (3) court days prior to the change in placement.
- (2) Prior to removal of a child from one county to another, the Department shall provide notice at least ten (10) court days unless emergency circumstances prevent such notice. In emergency circumstances, the Department shall give notice immediately and in no case later than 48 hours (two court days) following the child’s change in placement. Notice may be given orally or in writing.

(Subd (c) amended effective January 1, 2010; adopted as portion of Rule 6.2.11 effective August 1, 2002; previously amended effective July 1, 2008.)

(Rule 6.36 amended and renumbered effective January 1, 2010; adopted as Rule 6.2.11 effective August 1, 2002; amended and renumbered as Rule 6.2.7 effective July 1, 2008.)

6.36 COURT APPOINTED SPECIAL ADVOCATE PROGRAM (CASA)

The court adopts by incorporation into these rules the requirements of Welfare and Institutions Code sections 100 *et seq.* and 356.5, California Rules of Court, rule 5.655, and the Judicial Council Court-Appointed Special Advocate (CASA) Grant Program Guidelines, which implement the requirements of these statutory provisions. Any grant funds received under the CASA Grant Program shall be administered in accordance with the CASA Grant Program Guidelines.

Pursuant to California Rules of Court, rule 5.655(k)(5), CASA must submit its report to the Clerk of the Juvenile Court at least seven (7) days before each regularly scheduled review following the appointment of the CASA advocate. Copies of the report will be distributed by the Clerk of the Juvenile Court only to the parties or their attorneys of record when represented by counsel at least two (2) court days before the hearing for which the report was prepared. Relatives, de facto parents, foster parents, and service providers are not entitled to receive copies of the CASA reports absent further order of the juvenile court.

(Rule 6.37 amended effective July 1, 2012; adopted as Rule 6.2.13 effective August 1, 2002; previously renumbered as Rule 6.2.8 effective July 1, 2008; previously amended and renumbered effective January 1, 2010.)

6.37 – 6.59 [Reserved]

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

PART THREE: Juvenile Delinquency

6.60 RETURN ON BENCH WARRANT

With a minimum of two court days notice to the Juvenile Court, the District Attorney and Probation, counsel for juveniles in Welfare and Institutions Code section 602 proceedings may schedule a return on warrant hearing. If the minor fails to appear at the Return on Bench Warrant hearing, counsel for the juvenile will need permission to re-calendar the matter from the Juvenile Court Judge or their designated staff.

(Rule 6.60 renumbered effective January 1, 2010; adopted as Rule 6.1.9 effective July 1, 2008.)

**Superior Court of California
County of Solano**

Rule 6 – Juvenile Proceedings

APPENDIX

FILED
SOLANO COUNTY COURTS

02 AUG -2 PM 3:50

IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA

CHARLES D. RAMEY

JUVENILE COURT DIVISION

By Patsy Worcester
DEPUTY CLERK

IN THE MATTER OF:)
)
 AUTHORIZATION FOR IMMEDIATE)
 HEALTH APPRAISAL, IMMUNIZATION)
 AND TREATMENT OF ACUTE) **STANDING ORDER**
 CONDITIONS OF MINORS DETAINED AT) **2002-1**
 JUVENILE HALL; AND AUTHORIZING)
 CHIEF PROBATION OFFICER TO)
 CONSENT TO ONGOING TREATMENT IN)
 CERTAIN CIRCUMSTANCES)

The Juvenile Court Standing Order Misc J 629, issued on May 23, 2002, is hereby vacated and reissued *nunc pro tunc* as Standing Order 2002-1 effective August 1, 2002.

I. HEALTH APPRAISAL AT CONFINEMENT

In order that juveniles confined in the Solano County Juvenile Hall undergo a health appraisal at the first possible opportunity after their initial admission to the facility, Solano County Juvenile Hall is authorized to provide a health appraisal and appropriate services in compliance with California Code of Regulations, Title 15, Section 1430 et seq. This comprehensive health appraisal is to be conducted consistent with the requirements set forth in Title 15, as well as the recommendations of the American Academy of Pediatric Health Standards for Juvenile Court Residential Facilities, and may consist of:

1. A complete medical history and physical examination, including laboratory and diagnostic testing.
2. A mental health status evaluation.

1 3. A dental assessment and remedial care to include cleaning, fillings and root
2 canal therapy.

3 4. Any clinical laboratory tests the physician determines are necessary for the
4 evaluation of the juvenile's health status, to include screening for tuberculosis and sexually
5 transmitted diseases in sexually active juveniles, with their consent.

6 5. Any immunizations necessary to bring the juvenile's immunization status up
7 to date following guidelines of the American Academy of Pediatrics.

8 6. An assessment of the appropriateness of continuing or discontinuing the
9 prescription of any medication (including psychotropic medication) the minor may presently
10 be taking.

11 7. Mental health crisis intervention and the management of acute psychiatric
12 episodes.

13 8. Any routine medical care or dental care required for the care of illness and
14 injury, including the use of standard x-ray, based upon the results of this comprehensive
15 health appraisal.


16 **II. CONTINUING TREATMENT AFTER DETENTION**

17 At the time of admission to the Juvenile Hall, all reasonable efforts shall be made to
18 obtain the consent of the parent or legal guardian for ongoing medical, dental and mental
19 health care while the juvenile is in the facility. A further attempt to obtain consent shall be
20 made at the time of the detention hearing for ongoing care while the minor is detained in
21 Juvenile Hall, New Foundations or other placement. In the event that consent cannot be
22 obtained (e.g., parents or legal guardians not available to give consent) through reasonable
23 efforts, the Chief Probation Officer or his/her designee, shall complete a statement of due
24 diligence, to be placed in the minor's health file and lodged with the Court. Upon
25 completion of the statement of due diligence and placement in the minor's health file, the
Chief Probation Officer or his/her designee shall be authorized to consent on behalf of the
minor to any routine, ongoing or emergency care which will protect and promote the
minor's physical and mental well being. This authorization shall include the authority to

1 complete any documents required by the treating practitioner which are consistent with the
2 scope of this order, including specific consents required by the treating practitioner prior to
3 administering treatment.

4 Dated:

8/2/02


5 DAVID EDWIN POWER
6 Judge of the Superior Court, Juvenile Division

FILED
SOLANO COUNTY COURTS
02 AUG -2 PM 4:05

CHARLES D. RAMEY
By *J. E. B...*
DEPUTY CLERK

IN THE SUPERIOR COURT OF SOLANO, STATE OF CALIFORNIA
IN SESSION AS A JUVENILE COURT

IN THE MATTER OF:)
)
RELEASE OF ABSENT PARENTS) STANDING ORDER
NAMES AND ADDRESS BY SOLANO)
COUNTY DEPARTMENT OF CHLD) 2002- 5
SUPPORT SERVICES TO CPS)
)
)

The Juvenile Standing Order Misc J 572 issued on July 24, 2001, is hereby vacated and reissued *nunc pro tunc* as Standing Order 2002- 5 effective August 1, 2002.

IT IS HEREBY ORDERED THAT:

The Solano County Department of Child Support Services [SCDCSS] (formerly the Solano County District Attorney's Family Support Division) shall provide the name and address of absent parents, if known, to Solano County Child Protective Services. The information shall be provided upon written request by C.P.S. to SCDCSS and a determination by SCDCSS that providing the name and address of the absent parent will not violate the provisions of Family Code Section 17212(b)(2).

Dated: 8/2/02

David Edwin Power
DAVID EDWIN POWER
JUDGE OF THE SUPERIOR COURT, JUVENILE DIVISION

Standing Order 2002- 5
Re: Release of Parent Information by Solano County
Department of Child Support Services to CPS

IN THE SUPERIOR COURT OF SOLANO, STATE OF CALIFORNIA

IN SESSION AS A JUVENILE COURT

CHARLES D. RAMEY

By *[Signature]*
DEPUTY CLERK

IN THE MATTER OF:)
)
) **STANDING ORDER**
)
) **2002-7**
)
)
)
)

The Juvenile Standing Order Misc J 144 issued on August 25, 1993, is hereby vacated and reissued *nunc pro tunc* as Standing Order 2002- 7 effective August 1, 2002.

The Court finds that in the interest of continuing to provide optimum legal representation for parents and minors in Welfare and Institutions Code Section 300 proceedings in a effort to further the goal of family preservation and reunification, it is necessary to share certain information protected pursuant to Welfare and Institutions Code section 10850.

THE COURT THEREFORE ISSUES THE FOLLOWING STANDING ORDER:

For purposes of determining financial responsibility for court appointed attorney fees, Child Welfare workers may share the name, address, social security number, name and address of employer and any other financial information regarding a parent in a Welfare and Institutions Code section 300 proceeding with the Superior Court Financial Hearing Officer.

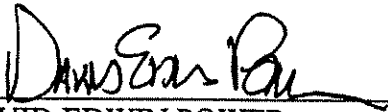
IT IS FURTHER ORDERED that the Financial Hearing Officer may convey this information to the Office of County Counsel for the sole purpose of collecting any fees ordered in the Welfare and Institutions Code Section 300 proceedings. The Office of County Counsel shall not use the information for any other purpose and shall keep such information separate

//

Standing Order 2002--7
Re: Release of Confidential Information to Financial
Hearing Officer

1 from Welfare and Institutions Code section 300 case files.

2 Dated: 8/2/02

3 
4 DAVID EDWIN POWER
5 JUDGE OF THE SUPERIOR COURT, JUVENILE DIVISION
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Standing Order 2002- 7
Re: Release of Confidential Information to Financial
Hearing Officer

1
2 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA

3 JUVENILE COURT DIVISION

FILED
Clerk of the Superior Court

JUN 17 2011

4
5 In the Matter of

) STANDING ORDER

6 STANDING ORDER AUTHORIZING
7 MENTAL HEALTH EVALUATION
8 AND/OR TREATMENT FOR
9 DEPENDENT CHILDREN OR MINORS
PLACED INTO PROTECTIVE CUSTODY
BY CHILD WELFARE SERVICES

) 2011-001

By 
DEPUTY CLERK

10
11 To expedite the assessment and treatment of mental health needs of minors
12 who are in need of crisis mental health services after being taken into protective
13 custody and prior to any juvenile court intervention, it is hereby ordered that the Child
14 Welfare Services Division of Solano County Health and Social Services, may
15 authorize mental health treatment for minors as specified in this order. Nothing in this
16 Standing Order shall allow Child Welfare Services to consent to placement of a minor
17 in an inpatient psychiatric facility, or to the prescription or administration of
18 psychotropic medications for a minor, absent the written consent of the minor's parent
19 or guardian when permitted by law, or a specific order of this Court.

20 This authority is given in all cases in which the minor's parent or guardian is
21 unavailable, unable or unwilling to execute such documents.

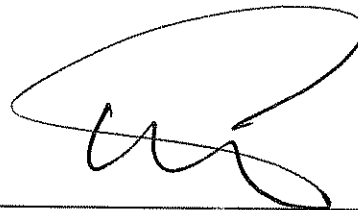
22 At the time a minor is taken into protective custody, all reasonable efforts shall
23 be made to obtain the consent of the parent or legal guardian for ongoing mental
24 health care while the minor is detained. Child Welfare Services shall maintain records
25 of its efforts to obtain consent for treatment. If consent cannot be obtained with

1 reasonable efforts, Child Welfare Services is authorized to consent on behalf of the
2 minor to any routine, ongoing or emergency mental health care which will protect and
3 promote the minor's mental well being. Child Welfare Services shall have the
4 authority to execute any documents required by the treating provider which are
5 consistent with the scope of this order, including specific consents required by the
6 provider for:

- 7 (1) assessment;
- 8 (2) treatment;
- 9 (3) sharing of information;
- 10 (4) determination and eligibility; and
- 11 (5) provision of payment of services.

12
13 Dated:

5/25/11



14 PRESIDING JUDGE OF THE
15 JUVENILE COURT

1
2 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA
3 JUVENILE COURT DIVISION
4

FILED
Clerk of the Superior Court

JUN 17 2011

5
6 In the Matter of

STANDING ORDER

7 ORDER RE: RELEASE OF PROBATION
8 FILES AND INFORMATION REGARDING
9 PARENTS WITH CHILDREN UNDER
10 THE JURISDICTION OF THE JUVENILE
11 COURT

2011-002

By 
DEPUTY CLERK

12 Pursuant to the provisions of California Penal Code section 1203.10 and the
13 holdings in *McGuire v. Superior Court* (1993) 12 Cal.App.4th 1685 and *People v.*
14 *Gayton* (2006) 137 Cal.App.4th 96, the Court finds good cause to issue the following
15 order regarding access to Probation Department files regarding adults who have
16 children under the jurisdiction of the Solano County Juvenile Court. ON GOOD
17 CAUSE APPEARING, IT IS ORDERED THAT:

18 1. The Solano County Department of Health and Social Services, Child
19 Welfare Services Division, is authorized to obtain verbal information from the Probation
20 Department and/or view the Probation Department's file concerning the parent, and
21 may make photocopies of documents contained in the file that are relevant to the
22 pending juvenile court proceeding as determined by the reviewing Child Welfare
23 Services worker.
24
25

1 2. A separate court order upon motion and a showing of good cause must
2 be obtained for disclosure of documents in the Probation Department's file which
3 contain:

4 (a) information regarding victims that is not already included in a probation
5 report,

6 (b) statements made in confidence to a probation officer by a non-party to the
7 pending proceeding,

8 (c) medical and mental health records, including psychological/psychiatric
9 evaluations, and

10 (d) medical records concerning the defendant. For purposes of this Standing
11 Order, the Probation Department File means the physical file maintained in the
12 Probation Department and any notes maintained in the automated case management
13 system.

14 3. All file reviews shall be conducted in the presence of a probation officer,
15 by appointment made at least 48 hours in advance, at the Probation Department office
16 or at another mutually agreeable location.

17 4. No original documents may be removed from the Probation Department's
18 file by Child Welfare Services Division staff.

19 5. The use of the information contained in the Probation Department's file is
20 limited to the Juvenile Court proceedings involving the parent's minor child(ren). No
21 information obtained pursuant to this Standing Order shall be used for any other
22 purpose without further Court orders.

23 6. The Probation Department may, in its sole discretion, require proof that
24 the person requesting to obtain information or view and copy a Probation Department
25 file is an authorized representative of the Department of Health and Social Services,

1 Child Welfare Services Division and that there are pending Juvenile Court proceedings
2 involving the individual(s) minor child(ren).

3
4 Dated:

5/25/11



PRESIDING JUDGE OF THE
JUVENILE COURT

1 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA
2 JUVENILE COURT DIVISION

3 **FILED**
Clerk of the Superior Court

JUN 17 2011

4 In re:

5)
6 STANDING ORDER TO FACILITATE)
7 CHILD WELFARE SERVICES DISASTER)
8 RESPONSE PLAN)

STANDING ORDER
2011-003

By  DEPUTY CLERK

9
10 It is ordered that in the event that Solano County is declared a disaster area by
11 the Governor of the State of California and the Presiding Judge of the Juvenile Court or
12 his designee is not available to conduct regular court business; Solano County Child
13 Welfare Services is authorized to take the action listed below pursuant to this standing
14 order to ensure the safety and protection of the children within Solano County:

- 15 1. **Authorization to Place in Temporary Custody:** Child Welfare Services
16 may place into temporary protective custody any minor in need of
17 services.
- 18 2. **Personal Identification of Minor Children:** Child Welfare Services may
19 release a minor's personal identifying information, including but not
20 limited to name, age, gender, birth date and photograph to assist in
21 locating or placing a minor.
- 22 3. **Placement of Minor Children:** Child Welfare Services may place minors
23 in emergency housing in or outside of the county and state and may
24 temporarily place minors with relatives and non-relatives who have not
25 been live-scanned.

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4. **Authorization to Consent to Medical Care:** Child Welfare Services may give consent for medical treatment for any minor in the temporary physical custody and control of Child Welfare Services, even if the minor is not currently under the supervision of the Juvenile Court.

This standing order shall cease to be effective when the Presiding Judge of the Juvenile Court or his designee is again available to conduct regular court business and issues an order terminating the applicability of the standing order to the declared disaster or the declaration of disaster has been rescinded.

Dated: 5/25/11



PRESIDING JUDGE OF THE
JUVENILE COURT

1
2 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA

3 JUVENILE COURT DIVISION

FILED
Clerk of the Superior Court

4
5 In the Matter of

) STANDING ORDER

JUN 17 2011

6 THE EXCHANGE OF INFORMATION
7 PERTAINING TO JUVENILES AMONG
8 MEMBERS OF MULTIDISCIPLINARY
TEAMS.

) 2011-004

By 
DEPUTY CLERK

9
10 The Juvenile Standing order Misc. 2002-4 issued on August 1, 2002, is hereby
11 vacated and reissued *nun pro tunc* as Standing Order 2011-004 effective July 1, 2011.

12 Pursuant to the provisions of Welfare and Institutions Code section 18986.40, the
13 Solano County Probation Department and the Solano County Department of Health and
14 Social Services, Division of Mental Health, have adopted a Memorandum of
15 Understanding (MOU) establishing a multidisciplinary team (MDT) to provide services to
16 minors coming within the jurisdiction of the juvenile court.

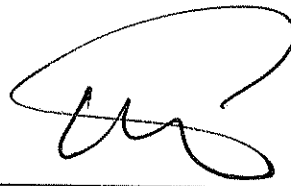
17 The MOU specifies the type of information that may be shared, and sets forth a
18 process which ensures the maximum protection of privacy and confidentiality rights by
19 requiring each team member to maintain the same confidentiality obligations, and be
20 subject to the same penalties as the persons disclosing confidential information.

21 Pursuant to the establishment of the MDT, and to further the treatment plans and
22 the delivery of services through the coordination of care to minors falling under the
23 jurisdiction of the Juvenile Court and their families, the Court makes the following
24 orders:
25

1 1. Each member of the MDT is hereby authorized to share medical, mental
2 health, social service and education information regarding the minor in order to provide
3 services to the minor, pursuant to the terms of the MOU.

4 2. No information shared among members of the MDT may be disclosed to
5 anyone other than members of the MDT and collateral service providers as defined by
6 Welfare and Institutions Code section 18986.40.

7
8 Dated: 5/25/11



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PRESIDING JUDGE OF THE
JUVENILE COURT

1 10850, each and every Solano County Superior Court Investigator or Child Welfare
2 Services worker, upon verification of employment and assignment to investigate the
3 guardianship or dependency matter under the jurisdiction of the Solano County Superior
4 Court, shall be given access to information pertaining to the minor, minor's family of
5 origin, the minor's guardian or prospective guardian as follows:

6 1. Any and all records maintained by the Solano County Health and Social
7 Services, Child Welfare Division, including but not limited to referrals, emergency
8 response investigative reports, court reports, evaluation, etc., pertaining to the minor,
9 the guardian or prospective guardian.

10 2. Any reports, recommendations, assessments prepared by a multi-
11 disciplinary team convened for the purpose of assessing and making recommendations
12 regarding a family or family group which includes the minor who is the subject of the
13 guardianship investigation.

14 3. Any and all school records pertaining to the minor who is the subject of the
15 guardianship investigation.

16 4. Any and all health records pertaining to the minor who is the subject of the
17 guardianship investigation.

18 5. Any and all mental health records pertaining to the minor who is the
19 subject of the guardianship investigation.

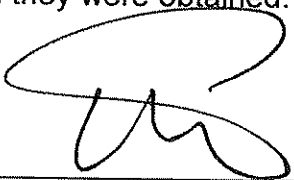
20 6. Any and all substance abuse records pertaining to the minor who is the
21 subject of the guardianship investigation.

22 7. Any and all court documents contained in a Solano County Superior Court
23 Probate Guardianship file on a minor who is subject to the jurisdiction every
24 representative of the Solano County Superior Court Dependency action Department of
25 Health and Social Services, Child Welfare Services Division, upon showing proof of

1 employment and verification of an open juvenile dependency case, shall be entitled to
2 receive copies of all court documents, including any Court Investigator's reports
3 submitted on behalf of the minor, regarding a guardianship of any minor child regarding
4 whom a Juvenile Dependency case has been filed.

5 8. Each party shall maintain the confidentiality of the records reviewed,
6 inspected or copied pursuant to this order. Any information obtained from these
7 records shall not be disseminated except in the court proceedings for which they were
8 obtained. Any copies or records obtained by the Court Investigator shall be destroyed
9 upon termination of the proceedings for which they were obtained.

11 Dated: 5/25/11

10 
12 _____
13 PRESIDING JUDGE OF THE
14 JUVENILE COURT

1
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3
4 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA
5 JUVENILE COURT DIVISION

FILED
Clerk of the Superior Court

JUN 17 2011

By 
DEPUTY CLERK

6 In the Matter of)
7) STANDING ORDER
8 EXCHANGE & RELEASE OF JUVENILE) 2011-006
9 RECORDS TO BE USED IN THE)
10 SOLANO COUNTYWIDE FOSTER)
11 YOUTH SERVICES PROGRAM)
12 (Education Code section 488850 et seq,)
13 Welfare & Institutions Code 827,)
14 California Rules of Court, rule 5.552))

13 Juvenile Court Standing Order 2002-9 issued on August 1, 2002, is hereby
14 vacated and reissued as Standing Order No. 2011-006 effective July 1, 2011.

15 WHEREAS, the Solano County Office of Education Foster Youth Services
16 Program (FYS) is intended to make foster youth educational services more readily
17 available to foster children and youth that are under the jurisdiction of the County of
18 Solano in compliance with the requirements established under AB 490; and

19 WHEREAS, in order to develop a database of foster children and youth under
20 the jurisdiction of the County of Solano, determine the educational services required
21 and provide such services, FYS has a need to access certain records and information
22 regarding the foster children and youth under the jurisdiction of the County of Solano;
23 and

24 WHEREAS, it is recognized that such records and information may be
25 confidential and may be released by court order; and

1 WHEREAS, it is the intent of the court to allow access to and use of such
2 records to the extent necessary for the purposes of FYS and the delivery of
3 educational services to the foster children and youth of this community;

4 IT IS ORDERED AS FOLLOWS:

5 1. Educational records and any other records necessary to ensure that the
6 educational needs of children and youth taken into protective custody by Child Welfare
7 Services or who come under the jurisdiction of the juvenile court; may be exchanged
8 between schools, school districts, community colleges, community college districts,
9 Solano County Office of Education and Child Welfare Services.

10 2. Records and information regarding foster children and youth under the
11 jurisdiction of the County of Solano and maintained by any agency for the purpose of
12 the delivery of educational services to the foster children under the jurisdiction of the
13 County of Solano shall be released to the representatives of FYS.

14 3. The records subject to this Order shall consist of health and education
15 records as described in Welfare and Institutions Code section 16010(a).

16 4. Copies of this Order shall be distributed to:

17 a. County of Solano, Health and Social Services Department, Child
18 Welfare Services, Mental Health, and Public Health,

19 b. County of Solano, Probation Department,

20 c. County of Solano, Office of Education,

21 d. All school districts in the County of Solano,

22 e. All Directors of Special Education Local Plan Areas (SELPA) in
23 the County of Solano,

24 f. All private and charter schools in the County of Solano,

25 g. Any community college district or community college.

1 h All other educational institutions serving foster youth in the County,
2 of Solano County,

3 i. All foster care providers and foster family agencies in the County
4 of Solano County,

5 j. All Regional Centers for the Developmentally Disabled in the
6 County of Solano County,

7 k. CASA of Solano County,

8 l. All attorneys representing clients in Juvenile Court matters;

9 m. ICWA Tribal Advocates,

10 n. All out-of-county Foster Youth Services Coordinators; and

11 o. All out-of-county providers who serve Solano County wards and
12 dependents.

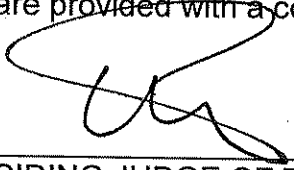
13 5. FYS representative may share information with the persons and agencies
14 listed in the preceding paragraph if: (1) such disclosure will be in the best interest of the
15 minor whose records are sought and (2) the information contained in those records is
16 necessary and relevant to the provision of services to the foster youth.

17 6. The records or information subject to this order may be transmitted
18 electronically if the transmitting party establishes a method of transmission that
19 ensures the confidentiality of the record or information.

20 7. Any person or agency receiving the records and information referred to in
21 this order or allowed access to the records and information maintained by FYS shall
22 maintain the confidentiality of these records and information and shall use such records
23 and information only to the extent necessary for the purposes of FYS or for the delivery
24 of educational services to the foster child or youth.

1 8. The Solano County Office of Education shall be responsible to ensure
2 that all persons and agencies involved with FYS are provided with a copy of this Order.

3
4 Dated: 5/25/11



5 _____
6 PRESIDING JUDGE OF THE
7 JUVENILE COURT

1
2 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA

3 JUVENILE COURT DIVISION

4 In the Matter of

) STANDING ORDER

FILED
Clerk of the Superior Court

) 2011-007

JUN 17 2011

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RELEASE OF SCHOOL RECORDS TO
SOLANO COUNTY PROBATION AND
SOLANO COUNTY HEALTH AND
SOCIAL SERVICES, CHILD WELFARE
SERVICES DIVISION
(Education Code section 49077)

By 
DEPUTY CLERK

Juvenile Court Standing Order 2002-10 issued August 1, 2002 is hereby vacated
and reissued as Juvenile Court Standing Order 2011-007, effective July 1, 2011.

Having found that it is necessary to have access to any and all student
information for Juvenile Court purposes in making pre-detention, detention, dispositional
and placement decisions regarding wards and dependent children of the court, the
Court hereby orders that:

1. The Solano County Probation Department or the Solano County Department of
Health and Social Services, Child Welfare Services division employee is authorized to
access student education records pertaining to a minor who has been taken into
protective custody, detained by the juvenile authorities or the Court or declared a
juvenile court ward or dependent in order for the department to(s) perform the
investigative and supervisory functions mandated by the above-entitled court .

2. This order shall remain in full force and effect until modified or rescinded by the
above-entitled court.

Dated: 5/25/11


PRESIDING JUDGE OF THE
JUVENILE COURT

1
2 IN THE SUPERIOR COURT OF SOLANO COUNTY, STATE OF CALIFORNIA

3 JUVENILE COURT DIVISION

FILED
Clerk of the Superior Court

JUN 17 2011

5 In the Matter of

) STANDING ORDER

6 TOXICOLOGY TESTING FOR DRUG
7 EXPOSED CHILDREN SUBJECT TO
8 JUVENILE LAWS
(Welfare & Institutions Code section
369(d)

) 2011-008

By 
DEPUTY CLERK

10
11 Juvenile Court Standing Order 2002-11 issued August 1, 2002 is hereby vacated
12 and reissued as Juvenile Court Standing Order 2011-008, effective July 1, 2011.

13 The Juvenile Court of the County of Solano finds that when children are taken
14 into protective custody by law enforcement officials or Solano County Health and Social
15 Services Child Welfare Division social workers due to alleged child endangerment
16 through the child's exposure to the illegal manufacturing, distribution or use of
17 methamphetamine or other illegal substance, it is important to determine the extent of
18 each child's toxic exposure to the chemicals used in the production of the
19 methamphetamine or illegal drug or to the methamphetamine or illegal drug itself to
20 ensure that each child's medical needs are met.

21 THEREFORE, IT IS ORDERED that

22 1. When a child is placed into protective custody by Solano County law
23 enforcement officials or Child Welfare Services Division, due to alleged child
24 endangerment through exposure or suspected exposure to the manufacture, production
25 or use of methamphetamine or other illegal substance, or the chemicals involved in the

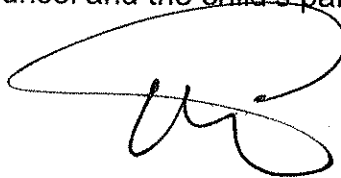
1 manufacture or production of methamphetamine or other illegal substance; at the
2 discretion of Solano County Health and Social Services, Child Welfare Division that
3 child may be immediately tested by trained medical personnel to assess the minor for
4 the ingestion or assimilation of chemicals and drugs. Follow-up medical treatment and
5 care shall be obtained as directed by the medical personnel.

6 2. The testing may consist of the analysis of urine, blood, or hair, with the
7 least invasive testing method to be used to secure medically accurate and timely
8 results.

9 3. Parental consent to such testing shall be sought and such efforts shall be
10 documented in the case records. However, if no parent or guardian is available,
11 capable or willing to authorize such medical procedures, a Solano County Child Welfare
12 division social worker may authorize such testing due to the emergency nature of the
13 need for medical assessment and treatment, pursuant to Welfare and Institutions Code
14 section 369(d).

15 4. All of the results and documentation of the medical testing conducted
16 pursuant to this order shall be deemed confidential; however, such information may be
17 released to law enforcement officials, the Solano County Health and Social Services
18 Child Welfare Division, the child's counsel and the child's parents and their counsel.

19
20 Dated: 5/25/11



21
22 _____
PRESIDING JUDGE OF THE
JUVENILE COURT

JUN - 4 2012

By *[Signature]*
DEPUTY CLERK

IN THE SUPERIOR COURT OF THE STATE OF CALIFORNIA
IN AND FOR THE COUNTY OF SOLANO
JUVENILE COURT DIVISION

In the Matter of

STANDING ORDER

**STANDING ORDER AUTHORIZING
MEDICAL EVALUATION AND
TREATMENT FOR MINORS PLACED
INTO PROTECTIVE CUSTODY AND
TEMPORARILY DETAINED IN OUT-OF-
PLACEMENT BY CHILD WELFARE
SERVICES**

No. 2012-001

1. To ensure the assessment and treatment of the medical needs of minors after they are taken into protective custody and temporarily detained in out-of-home placement and prior to any juvenile court intervention, it is hereby ordered that effective July 1, 2012, the Child Welfare Services Division of Solano County Health and Social Services may authorize medical evaluation and treatment for such minors as specified in this order.

2. Nothing in this Standing Order shall allow Child Welfare Services to consent to invasive medical procedures absent the consent of the minor's parent or legal guardian or a specific order of this Court.

3. This authority is given in all cases in which consent to a medical or dental procedure must be given by a minor's parent or legal guardian and the minor's parent

1 or legal guardian is unavailable or unable to provide written consent or verbal consent
2 to the medical or dental facility or provider consistent with the facility's or provider's
3 policies and procedures. This authority is also given if a parent refuses to give consent
4 and Child Welfare Services determines, upon consultation with appropriate medical
5 personnel, that the parent's refusal to give consent would (1) place the child at
6 imminent risk of serious physical harm or illness, (2) expose others to a communicable
7 disease that could pose a significant risk, or (3) pose a hazard to the minor or to others
8 if a health condition is left untreated during the period of temporary custody. Nothing in
9 this Standing Order shall allow Child Welfare Services to override a minor's consent or
10 refusal to give consent to a medical or dental procedure for which the minor has
11 capacity to consent per Family Code section 6920 et seq.

12 4. At the time a minor is taken into protective custody, Child Welfare Services shall
13 make all reasonable efforts to obtain the consent of the parent or legal guardian for
14 ongoing medical and dental evaluation and treatment for the minor while the minor is
15 detained. Child Welfare Services shall maintain records of its efforts to obtain consent
16 for evaluation and treatment. If consent cannot be obtained with reasonable efforts,
17 Child Welfare Services is authorized to consent on behalf of the minor to secure the
18 following medical and dental services to protect and promote the minor's physical well-
19 being consistent with the services recommended in the Statement of the Committee on
20 Adolescents of the American Academy of Pediatrics, Health Care for Children and
21 Adolescents in Detention Centers, Jail, Lock-ups and other Court Sponsored
22 Residential Facilities:

- 23 A. A comprehensive health assessment and physical examination.
- 24 B. Any clinical laboratory tests the physician determines are necessary for
25 the evaluation of the minor's health status.

1 C. Any immunization necessary to bring a minor's immunizations up to date,
2 if immunizations are recommended by the American Academy of Pediatrics for
3 that minor's age.

4 D. Any routine medical care or procedures required based on the results of
5 the comprehensive health assessment and any routine medical required for the
6 care of illnesses and injury, including the use of standard X-rays or imaging.

7 Routine medical procedures exclude any medical procedure requiring local or
8 general anesthesia. Routine medical care or procedures as referred to above
9 includes:

10 1. First aid care for conditions which require immediate assistance
11 from a person trained in basic first aid as defined by the American Red
12 Cross or its equivalent;

13 2. Clinic care for ambulatory minors with health care complaints which
14 are evaluated and treated on an out-patient basis;

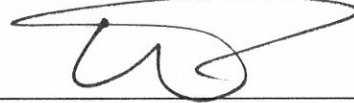
15 3. Inpatient bed care for illness or injury which requires limited
16 observation and/or management and does not require admission to a
17 licensed hospital. Routine medical care does not include blood
18 transfusions or inpatient care for illness or diagnosis which requires
19 optimal observation and/or management in a licensed hospital.

20 E. A dental assessment, including X-rays when appropriate, and any routine
21 dental treatment required based on the results of the dental assessment. Routine
22 dental treatment does include the use of local anesthesia but excludes any
23 procedure requiring general anesthesia.

24 5. Child Welfare Services shall have the authority to execute any documents
25 required by the treating facility or provider to secure the medical and dental

1 assessments, treatments and/or procedures which are consistent with the scope of this
2 order, including specific consents required for assessment, treatment, sharing of
3 information, determination of eligibility and provision for the payment of the services.

4 Dated: 6/4/12



5 _____
6 PRESIDING JUDGE OF THE
7 JUVENILE COURT

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FEB 02 2018

1
2 IN THE SUPERIOR COURT OF CALIFORNIA
3 IN AND FOR THE COUNTY OF SOLANO
4 IN SESSION AS A JUVENILE COURT

By 
DEPUTY CLERK

5
6 STANDING ORDER NO. 2016-001-JV
7 RELEASE OF JUVENILE CASE FILE
8 INFORMATION FOR WELF. & INST. C. §§
9 601 AND 602 PROCEEDINGS
10 (Welf. & Inst. C. § 827; *T.N.G. v Superior
11 Court* (1971) 4 Cal.3d 767; Cal. Rules of
12 Court, rule 5.552)

13 Effective July 1, 2016, Juvenile Court Standing Order No. 2013-001 is vacated and
14 replaced with this Standing Order.

15 Good cause appearing and consistent with Welfare and Institutions Code section 827¹,
16 *T.N.G. v Superior Court* (1971) 4 Cal.3d 767, and California Rules of Court, rule 5.552, Cal.
17 Rules of Court, rule 5.552, the Juvenile Court of the Superior Court of California, County of
18 Solano makes the following Standing Order:

19 **I. GENERAL PROVISIONS**

20 A. This Standing Order applies to the inspection and copying of juvenile case files
21 for minors currently involved or previously involved in proceedings under sections 601 and
22 602.

23 B. The provisions of section 827 and California Rules of Court, rule 5.552 are
24 incorporated herein by reference.

25 C. The term "juvenile case file" as used in this standing order includes the
26 documents listed in California Rules of Court, rule 5.552, subdivision (a). With the exception of
27 documents specifically related to a proceeding involving a violation of a court order, the

28 ¹ All future statutory references are to the Welfare and Institutions Code, unless otherwise indicated.

1 following documents are not included in the definition of a juvenile case file:

- 2 1. Victim information not already contained in a probation report.
- 3 2. Records from the Solano County Juvenile Detention Facility or other
4 placements.
- 5 3. Other documents that are privileged or confidential pursuant to any
6 other state law, federal law or regulation, including, but not limited to
7 psychological or psychiatric evaluations, mental health records and
8 medical records.² The terms “psychological or psychiatric reports,
9 evaluations and other mental health records” and “medical records” are
10 those records which are created by a mental health or medical care
11 provider and which contain medical information as defined by Civil Code
12 section 56.05, subdivision (j).
- 13 4. Records that have been sealed pursuant to Welfare and Institutions
14 Code sections 398, 781, 786, or 793, subdivision (c).

15 D. Nothing in this Standing Order shall prohibit any city or the County from
16 establishing a computerized data base system that permits the probation department, law
17 enforcement agencies and school districts to access probation department, law enforcement,
18 school district and juvenile court information and records pursuant to the provisions of section
19 827.1.

20 E. Notwithstanding any other provision of this Standing Order, an individual
21 seeking psychiatric evaluations, medical records and/or mental health records from his or her
22 own juvenile case file may receive such records following execution of a release that is
23 compliant with the federal Health Information Privacy and Accountability Act (“HIPAA”) and the
24 California Confidentiality of Medical Information Act (Cal. Civil Code §56 et seq.). The
25 release shall be on a form adopted by the Probation Department and must be either notarized

26 _____
27 ² See Welfare and Institutions Code section 827(a)(3)(A). Privileged or confidential records not subject to
28 the informal release provisions of this Standing Order include, but are not limited to, records protected by
Welfare and Institutions Code section 10850 [public social services records], Penal Code section 11167
[mandated reporting of abuse or neglect], Evidence Code section 1040 [official information given in
confidence] and Government Code sections 6253.2 and 6254(n) [persons paid to perform in-home
supportive services, licensing applications].

1 or signed in the presence of a Probation Department official or other law enforcement official
2 designated by the Chief Probation Officer.

3 F. Except as otherwise provided in this Standing Order, requests by any individual
4 for access to juvenile case file information, or by any law enforcement agency to disseminate
5 any information in its files to any person or agency not authorized by section 827, this
6 Standing Order, or another effective standing order to receive such information shall only be
7 considered by the Juvenile Court on an individual basis, pursuant to a petition filed under
8 section 827.

9 G. Nothing in this Standing Order shall prohibit the dissemination of information as
10 otherwise required or permitted by law.

11 **II. VIEWING JUVENILE CASE FILES**

12 A. Only those persons specifically identified in section 827(a)(1) may view a
13 juvenile case file. Any person not specifically listed must file a petition under section 827 for
14 permission to view a juvenile case file.

15 B. The Probation Department and the court may, in their sole discretion, require
16 proof that a person wishing to view a file falls into one of the categories listed in section
17 827(a).

18 C. All persons wishing to view a juvenile case file must complete and sign a form
19 which includes an acknowledgement that the records being viewed are confidential and the
20 information contained is not to be further disseminated without an order of the court. The form
21 shall also contain a declaration signed under penalty of perjury that the person requesting
22 access to the juvenile case file is authorized either by statute or court order to view the file.
23 The executed form shall be maintained in the Probation Department file or the court file being
24 accessed.

25 D. No information relating to the contents of a juvenile case file may be
26 disseminated by the person viewing the file without a court order, except to employees of the
27 department employing the person viewing the file with an official need.
28

1 **III. OBTAINING COPIES OF DOCUMENTS FROM JUVENILE CASE FILES**

2 A. Only those persons specifically listed in section 827(a)(5) may obtain copies of
3 documents contained in the juvenile case file without a court order.

4 B. The Probation Department and the court may, in their sole discretion, require
5 proof that a person wishing to obtain copies of documents falls into one of the categories
6 permitted by section 827(a)(5), and may impose a reasonable fee for copying, consistent with
7 the fee schedule set by the County Board of Supervisors (for Probation Department records)
8 or by law (for court records).

9 C. All persons wishing to receive copies of documents from a juvenile case file
10 must complete and sign a form which includes an acknowledgement that the records are
11 confidential and are not to be further disseminated without an order of the court. The form
12 shall also contain a declaration signed under penalty of perjury that the person requesting
13 access to the juvenile case file is authorized either by statute or court order to obtain copies of
14 documents from the file. The executed form shall be maintained in the Probation Department
15 file or court file being accessed. Every person receiving copies of documents from a juvenile
16 case file shall be provided with a copy of a *Protective Order re: Release of Juvenile Case File*
17 *Information* issued by the court.

18 D. The Probation Department may, in its discretion, release documents regarding
19 minors currently under their supervision as necessary to hospitals, schools, camps, job corps,
20 ranches, or any other person, group or institution which requires such information for the
21 placement, treatment or rehabilitation of the minor, including but not limited to no-contact
22 orders, gang terms and other terms of probation. The Probation Department file shall contain
23 a written record of information and documents released pursuant to this paragraph.

24 E. The Probation Department, may, in its discretion, release to the superintendent
25 or designee of the school district where the minor is enrolled or attending school information
26 regarding (1) the minor's status with the court or the Probation Department and (2) terms or
27 conditions imposed on the minor as a result of said status which pertain to the minor's
28 schooling, including, but not limited to, no-contact orders gang terms and other terms of

1 probation. The Probation Department file shall contain a written record of information and
2 documents released pursuant to this paragraph.

3 **IV. OBTAINING VERBAL INFORMATION CONTAINED IN JUVENILE CASE FILES**

4 A. To the extent permitted or required by state or federal law, the Probation
5 Department may, in its discretion, verbally release information regarding a juvenile case file to
6 the following persons who have an official interest and need to know in connection with the
7 discharge of their official responsibilities, and who are employed by:

- 8 1. California Attorney General.
- 9 2. District Attorney's offices throughout California.
- 10 3. California law enforcement agencies.
- 11 4. Probation Departments in California.
- 12 5. Public Welfare Agencies in California.
- 13 6. California Bureau of Identification and Investigation.
- 14 7. California Department of Corrections and Rehabilitation, Division of
15 Juvenile Justice.
- 16 8. California Department of Corrections and Rehabilitation.
- 17 9. Any Coroner.
- 18 10. Federal investigative and enforcement agencies.

19 B. The Probation Department may, in its discretion, verbally provide information,
20 including, but not limited to, no-contact orders, gang terms and other relevant terms of
21 probation to a minor's school as necessary to promote the rehabilitation of the minor and to
22 lessen the potential for drug use, violence and other forms of delinquency. The Probation
23 Department file shall contain a written record of information released pursuant to this
24 paragraph.

25 C. The Probation Department may, in its discretion, verbally release information
26 regarding minors currently under their supervision as necessary to hospitals, schools, camps,
27 job corps, ranches, or any other person, group or institution which requires such information
28 for the placement, treatment or rehabilitation of the minor, including, but not limited to, no-

1 contact orders, gang terms and other relevant terms of probation. The Probation Department
2 file shall contain a written record of all information released pursuant to this paragraph.

3 D. Victims, parents or guardians of minor victims, attorneys for victims and
4 insurers of victims may verbally receive the following information without a court order:

- 5 1. Whether or not an arrest has been made.
- 6 2. The offenses for which an arrest has been made.
- 7 3. The disposition of the minor by the law enforcement agency.
- 8 4. Whether or not a petition has been filed with the Juvenile Court and the
9 charge(s) to be alleged in any such petition.
- 10 5. The results of any detention and/or disposition hearing held.
- 11 6. The date, time and location of any hearing in the case.
- 12 7. The identification of the judge or referee who heard or will hear the
13 case.
- 14 8. The jurisdictional finding and the final disposition of the Court.
- 15 9. Any anticipated release date.
- 16 10. All information received by any recipient shall be kept confidential by
17 that recipient, and shall not be further released unless utilized to take
18 court action against a minor, parent or guardian.

19 The Probation Department file shall contain a written record of information and
20 documents released pursuant to this paragraph.

21 E. The Probation Department may, in its sole discretion, require proof that a
22 person wishing to obtain verbal information from a juvenile case file is authorized by this order
23 to receive such information.

24 **V. RELEASE OF INFORMATION TO THE MEDIA.**

25 The following shall apply with regard to the release of information to the media relating
26 to minor offenses:

27 A. The District Attorney, Chief Probation Officer, and law enforcement officials or
28 their designees may, in their discretion, divulge the following information:

- 1 1. Whether or not an arrest has been made.
- 2 2. The offenses for which an arrest has been made.
- 3 3. The disposition of the minor by the law enforcement agency.
- 4 4. In cases where disclosure of information aids in an investigation, assists in
- 5 the arrest of a suspect or escapee or otherwise warns the public of
- 6 danger; the name, date of birth and physical description of a minor and,
- 7 where relevant to protect public health and safety, the charges against
- 8 the minor.

9 B. The District Attorney and Chief Probation Officer or their designees may, in
10 their discretion, divulge the following:

- 11 1. Whether or not a petition has been filed with the Juvenile Court and the
- 12 charge to be alleged in any such petition.
- 13 2. The results of any detention hearing held.
- 14 3. The date and location of the hearing.
- 15 4. The identification of the judge or referee who heard or will hear the
- 16 matter.
- 17 5. The jurisdictional finding and the final disposition of the court.

18 **VI. PROTECTIVE ORDER**

19 Unless otherwise specifically authorized by the Juvenile Court, or otherwise provided
20 by this order, every person who receives documents or information from a juvenile case file is
21 subject to a protective order. The terms of the protective order shall be incorporated herein by
22 reference and shall be a part of this Standing Order.

23 **It is so ordered.**

24 Dated: May 16, 2016

25 D. Scott Daniels
26 D. SCOTT DANIELS
27 Presiding Judge of the Superior Court
28 Juvenile Division

1 SUPERIOR COURT OF CALIFORNIA
2 IN AND FOR THE COUNTY OF SOLANO
3 IN SESSION AS A JUVENILE COURT
4

5 IN THE MATTER OF:
6 RELEASE OF JUVENILE RECORDS
7
8
9

PROTECTIVE ORDER RE: RELEASE OF
JUVENILE CASE FILE INFORMATION FOR
W&I 601 AND 602 PROCEEDINGS

10 Pursuant to the terms of Standing Order 2016-001-JV, unless otherwise specifically
11 authorized by the Juvenile Court, or otherwise provided by this Order, every person who
12 receives documents or information from a juvenile case file is subject to the following
13 protective order:

14 A. No documents from a juvenile case file or information relating to the contents of
15 records in a juvenile case file may be disseminated by the receiving party to any other person
16 or agency, or made attachments to any other document(s) or used in any other proceeding
17 without the prior approval of the Presiding Judge of the Juvenile Court, except as follows:

18 1. The records are used in a proceeding to declare the minor who is the
19 subject of the records a dependent child or ward of the juvenile court.

20 2. The records are released to immediate office staff, clients, expert
21 witnesses and investigators retained for the purposes of the pending matter only and with no
22 one else.

23 3. District Attorneys, City Attorneys authorized to prosecute criminal
24 cases, and Public Defenders or other private defense counsel may disseminate records or
25 disclose information in compliance with their discovery obligations under statutory and case
26 law.
27
28

1 4. Records and information may be disclosed to a judicial officer of Solano
2 County Superior Court for any purpose associated with that judicial officer's obligation to
3 render any type of decision concerning that individual.

4 5. In cooperation with federal authorities or entities as permitted or
5 required by state or federal law.

6 B. Any production or dissemination of records pursuant to Standing Order 2016-
7 001-JV shall be accompanied by a copy of this Protective Order.

8 C. At the conclusion of the proceedings for which the records were disseminated,
9 the receiving party shall cause all copies of the documents released to be destroyed, except
10 that a single copy of the documents may be retained in each counsel's file, in a sealed
11 condition, and no person shall have access to the documents thereafter without further order
12 from the Juvenile Court.

13 D. Any violation of this Protective Order is punishable as a misdemeanor.
14
15

16 Dated: May 16, 2016

17 W. Scott Daniels
18 D. SCOTT DANIELS
19 Presiding Judge of the Superior Court
20 Juvenile Division
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FILED
Clerk of the Superior Court

FEB 02 2018

By [Signature]
DEPUTY CLERK

1 **IN THE SUPERIOR COURT OF CALIFORNIA**
2 **IN AND FOR THE COUNTY OF SOLANO**
3 **IN SESSION AS A JUVENILE COURT**

4
5 Standing Order No. 2016-002-JV

6 DESIGNATION OF CHIEF PROBATION
7 OFFICER/DESIGNEE AS
8 REPRESENTATIVE OF COURT FOR
9 PURPOSES OF REFERRING STUDENTS
10 TO THE COMMUNITY SCHOOL
11 PROGRAMS

12 (Welf. & Inst. C. § 654(c), Educ. C. §
13 42238.18(b))

14 This standing order amends and supersedes Standing Order 2002-02 (filed August 2,
15 2002), effective July 1, 2016.

16 GOOD CAUSE APPEARING, IT IS HEREBY ORDERED THAT in the matter of
17 students referred to Community Schools, the Chief Probation Officer or his/her designee be
18 the representative of the Court for the purpose of referring students to the Community
19 Schools pursuant to Welfare and Institutions Code section 654, subdivision (c). The Court
20 further authorizes the representative to review and certify the appropriateness of the
21 placement pursuant to Education Code section 42238.18, subdivision (b).

22 **It is so ordered.**

23 Date: May 13, 2016

24 D. Scott Daniels
25 **D. Scott Daniels**
 Presiding Judge of the Juvenile Court

**Superior Court of California
County of Solano**



**Superior Court of California
County of Solano**

Rule 7 – Probate

PART ONE: Probate Proceedings Generally

7.1 SCOPE OF PROBATE RULES; DIRECT CALENDARING

a. MATTERS TO WHICH RULE 7 APPLIES

Except as otherwise provided elsewhere in these rules, these probate rules apply to all matters governed by the Probate Code, except probate guardianships and probate conservatorships, which are governed by Rule 15.

(Subd (a) amended effective January 1, 2012; adopted effective July 1, 2009.)

b. DIRECT CALENDARING

When a probate case is filed, or received and filed as a transfer from another county, the Clerk of the Court shall assign the case in a manner directed by the Supervising Judge of the Civil Division. The assignment to a judge shall be deemed to be for all purposes. The method of selection of the judge to be assigned to a case shall be designed to equally distribute the workload among the judges and best serve the court.

(Subd. (b) adopted effective January 1, 2012; former subd (b) repealed effective January 1, 2012.)

(Rule 7.1 amended effective January 1, 2012; adopted effective July 1, 2009; previously amended effective January 1, 2010.)

7.2 USE OF JUDICIAL COUNCIL FORMS; FORMAT OF PLEADINGS; CALENDARING AND FILING

a. USE OF JUDICIAL COUNCIL FORMS

Printed forms of petitions, orders and other documents which have been adopted or approved by the Judicial Council shall be used in all cases where applicable.

(Subd (a) adopted effective July 1, 2009; previously adopted as unlettered portion of Rule 7.1 effective July 1, 1988.)

b. FORMAT OF PLEADINGS

Petitions, orders and other documents for which there is no available form approved by the Judicial Council shall conform to the requirements of the

**Superior Court of California
County of Solano**

Rule 7 – Probate

PART ONE: Probate Proceedings Generally

California Rules of Court, rules 2.100-2.119.

(Subd (b) adopted effective July 1, 2009; previously adopted as unlettered portion of Rule 7.1 effective July 1, 1988.)

c. NOTICES OF UNAVAILABILITY OF COUNSEL

The court shall not accept for filing a "Notice of Unavailability of Counsel" or other document or pleading whose sole purpose is to advise the court and/or other parties of an attorney's or party's unavailability. (*Carl v. Superior Court of Orange County* (2007) 157 Cal.App.4th 73.)

(Subd (c) adopted effective July 1, 2009; previously adopted as unlettered portion of Rule 7.1 effective July 1, 1988.)

d. CALENDARING

Counsel and self-represented parties may contact the calendaring clerk to reserve a hearing date on a petition, motion, or other moving paper. *Reservation of a calendar date does not place the matter on the court's calendar.* Except for matters brought ex parte, petitions, motions, and other moving papers shall not be calendared for hearing until the moving party files either a *Notice of Hearing* (Judicial Council form DE-120) or a *Notice of Petition to Administer Estate* (Judicial Council form DE-121). The applicable form must be filed within three court days of reserving the date; otherwise, the date reserved will be canceled.

(Subd (d) amended effective January 1, 2019; adopted effective July 1, 2010; amended effective January 1, 2012.)

e. FILING

All petitions concerning trusts shall be filed at least 30 days prior to the desired or scheduled hearing date. All petitions concerning non-trust matters shall be filed at least 15 days prior to the desired or scheduled hearing date.

Motions, responses to motions, and replies to responses shall be filed as required by the Code of Civil Procedure. For purposes of this rule, the term "motion" refers to requests for relief outside the Probate Code, including but not limited to discovery motions, demurrers, motions for summary judgment, motions for judgment on the pleadings, motions to tax or strike costs, and motions to enforce settlements per Code of Civil Procedure section 664.6.

**Superior Court of California
County of Solano**

Rule 7 – Probate

PART ONE: Probate Proceedings Generally

The applicable filing fee for a particular document is governed by the document’s content and the relief requested (if any), not its caption.

(Subd. (e) amended effective January 1, 2019; adopted effective January 1, 2012.)

(Rule 7.2 amended effective January 1, 2019; adopted as Rule 7.1 effective July 1, 1988; previously amended effective January 1, 2009; previously amended and renumbered effective July 1, 2009; amended effective July 1, 2010 and January 1, 2012.)

7.3 SIGNATURES AND VERIFICATION OF PLEADINGS

Petitions, reports and accounts, as well as objections or responses to petitions, reports and accounts, shall be verified as required by Probate Code section 1020 et seq. Supplements and amendments to pleadings shall be verified in the same manner as the pleading being supplemented or amended. The verification shall be included as part of the pleading at the time the pleading is filed.

(Rule 7.3 amended effective January 1, 2019; adopted as Rule 7.2 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered effective July 1, 2009.)

7.4 BONDING OF PERSONAL REPRESENTATIVE

a. INCREASES IN BONDS

When a bond must be increased, the court will ordinarily require the filing of an additional bond rather than a substitute bond.

b. DECREASES IN BONDS

When the bond may be decreased, the court will ordinarily require an order decreasing the liability on the existing bond rather than the filing of a substitute bond. All petitions for reduction of bond must be filed and set for a noticed hearing. A petition to reduce bond shall not be granted ex parte.

c. WAIVER OF BOND

Absent extenuating circumstances, the court will not accept a waiver of bond signed by a parent or guardian on behalf of a minor child if that parent or guardian is seeking appointment as or has been appointed as personal representative of an estate of which the minor child is an heir or beneficiary.

**Superior Court of California
County of Solano**

Rule 7 – Probate

PART ONE: Probate Proceedings Generally

Absent extenuating circumstances, the court will not accept a waiver of bond signed by a conservator on behalf of a conservatee if that conservator is seeking appointment as or has been appointed as personal representative of an estate of which the conservatee is an heir or beneficiary.

(Rule 7.4 amended effective January 1, 2019; adopted as Rule 7.6 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered effective July 1, 2009.)

7.5 DECLINATION OF NOMINATED EXECUTOR

If the person petitioning for letters is not the nominated executor in the decedent's will, it is insufficient to allege merely that the nominated executor declines to act as such. The petitioner must either (1) attach to the petition a written declination to act as executor, signed by the nominated executor, or (2) include in the petition sufficient facts demonstrating that the nominated executor should be held to have waived his or her right to appointment per Probate Code section 8001. Any such nominated executor must receive notice of the petition per Probate Code section 8110.

(Rule 7.5 amended and renumbered effective July 1, 2009; adopted as Rule 7.7 effective July 1, 1988.)

7.6 NOTICES

Several Probate Code sections require the Clerk of the Court to "cause notice of the hearing to be mailed." The Clerk fulfills this function by requiring a party or a party's counsel to do the mailing. Therefore, the party or the party's counsel is charged with this duty.

(Rule 7.6 amended and renumbered effective July 1, 2009; adopted as Rule 7.10 effective July 1, 1988; previously amended effective July 1, 1989.)

7.7 CONTINUANCES

a. PROCEDURE TO OBTAIN CONTINUANCE

No matter shall be continued unless the department of the court to which the matter is assigned approves of the continuance date.

If the proposed continuance is by stipulation, the stipulation shall be submitted

**Superior Court of California
County of Solano**

Rule 7 – Probate

PART ONE: Probate Proceedings Generally

to the court for review and approval of the proposed continuance date. If the proposed continuance date is approved, an amended *Notice of Hearing* (Judicial Council form DE-120) with the new hearing date may thereafter be submitted for filing. A copy of the stipulation shall be submitted to the calendar clerk concurrently with the amended *Notice of Hearing*, along with all appropriate filing fees.

If the proposed continuance is not by stipulation, the continuance shall be requested either through a notice of motion or through the ex parte process as set forth in local rule 7.10. If the proposed continuance date is approved, an amended *Notice of Hearing* (Judicial Council form DE-120) with the new hearing date may thereafter be submitted for filing. A copy of the court's order granting the continuance shall be submitted to the calendar clerk concurrently with the amended *Notice of Hearing*, along with all appropriate filing fees.

Unless the continuance was ordered by the court on its own motion, a *Notice of Hearing* is not sufficient, in and of itself, to cause the recalendaring of a hearing.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009.)

b. CONTINUANCE OF HEARING AFTER ANNOUNCEMENT OF PREGRANT ORDER

No probate matters will be continued after announcement of a pregrant thereon, except by order of the court for good cause.

(Subd (b) adopted effective July 1, 2009.)

(Rule 7.7 amended effective January 1, 2013; adopted effective July 1, 2009; previously amended January 1, 2013.)

7.8 PROBATE NOTES AND PREGRANTS IN PROBATE MATTERS

Probate notes on selected probate matters will be available approximately one week prior to the scheduled hearing date. The availability of probate notes may fluctuate depending on the court's calendars and staffing availability. Probate notes are available by signing onto the court's web site at www.solano.courts.ca.gov and selecting the link for "Probate Notes and Pre-grants" (next to "Tentative Rulings").

Pregrant orders are the court's tentative rulings on decedent estates, trusts, and miscellaneous probate petitions. Pregrant orders are not posted for conservatorship or guardianship matters or for ex parte applications. A pregrant order on a probate matter

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will be available after 2:00 p.m. on the court day immediately preceding the scheduled hearing by signing onto the court’s web site at www.solano.courts.ca.gov and selecting the link for “Probate Notes and Pre-grants” (next to “Tentative Rulings”) or by telephoning the court at (707) 207-7331.

(Rule 7.8 amended effective January 1, 2019; adopted effective July 1, 2009; previously amended effective January 1, 2010, January 1, 2012, and January 1, 2016.)

7.9 APPEARANCES AT HEARINGS

a. HEARINGS WHERE APPEARANCE NOT REQUIRED

Those matters which by law may be determined upon verification and without testimony shall be submitted for appropriate action by the court without appearance by counsel or witnesses, provided that counsel or the petitioning party accomplish both of the following:

- (1) All declarations, affidavits, consents, waivers, proposed orders and other necessary papers shall be filed with the Clerk of the Court no later than four full court days prior to the hearing.
- (2) The verified petition or an accompanying affidavit signed by the petitioner or by the personal representative or by counsel of record for either of said persons shall set forth the information necessary to establish the amount of bond, if one is required.

All probate matters shall be non-appearance except as stated in Solano County Local Rules, rule 7.9, subdivision (b), or where an appearance is required by the court.

(Subd (a) amended effective July 1, 2009; adopted effective July 1, 1989; previously amended effective January 1, 2009.)

b. HEARINGS WHERE APPEARANCE IS REQUIRED

Subdivision (a) shall not apply and personal appearance by the parties and/or counsel shall be required in the following cases:

- (1) Contested matters.
- (2) Proof of holographic wills, if the petitioner did not previously submit

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proof of the admissibility of each testamentary document to probate or if an appearance is specially required by the hearing judge.

- (3) Petitions for court confirmation of sales of property.
- (4) Any non-routine matter which by law requires the personal appearance of any person.

(Subd (b) amended effective July 1, 2009; adopted effective July 1, 1989; previously amended effective January 1, 2009.)

c. TELEPHONIC APPEARANCE

Telephonic appearance will be permitted when authorized by California Rule of Court, rule 3.670 and Solano County Local Rules, rule 4.12(h), if the party seeking to appear telephonically has also complied with the notice requirements set forth in those rules, and subject to the exceptions set forth in those rules and the court's discretion to require personal appearances.

(Subd (c) amended effective January 1, 2010; amended and relettered effective July 1, 2009; adopted as subd (d) of Rule 7.11 effective July 1, 1989; previously amended effective January 1, 2009.)

(Rule 7.9 amended effective January 1, 2010; amended and renumbered effective July 1, 2009; adopted as Rule 7.11 effective July 1, 1989.)

7.10 EX PARTE APPLICATIONS

a. NOTICE ON EX PARTE PETITIONS

- (1) Unless otherwise ordered by the court, a party seeking ex parte relief shall provide notice of the application for ex parte relief to all individuals entitled to notice by 10:00 a.m. on the court day prior to the ex parte appearance.
- (2) All applications for ex parte orders must contain a statement on special notices. If there are no requests for special notice on file presently in effect, the statement shall so state. If there are one or more requests for special notice on file that have not been withdrawn, the statement shall list the parties requesting special notice.

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- (3) If a person entitled to notice has waived notice of the ex parte application, the waiver shall be filed with the court concurrently with the moving papers.

(Subd (a) amended effective January 1, 2018; adopted effective July 1, 2009; previously adopted as subd (c) of former Rule 7.11 effective July 1, 1989.)

b. WAIVER OF NOTICE

A party seeking to dispense with notice for a particular individual for whom notice has not yet been waived shall file a request to dispense with notice concurrently with the ex parte application. The request shall set forth sufficient evidentiary facts supporting the request. For individuals who cannot be located, the party shall file a declaration of due diligence in compliance with California Rules of Court, rule 7.52, prior to the ex parte appearance.

(Subd (b) amended effective January 1, 2018; adopted effective July 1, 2009.)

c. EX PARTE PROCEDURE

Ex parte matters will be heard upon appointment scheduled directly with the designated department. The date and time of the ex parte hearing must be confirmed with the designated department prior to the moving party giving notice of the hearing. For purposes of this rule, the designated department is the department already assigned to the case, or, if the case has not yet been assigned to a department or judicial officer, the designated department is the department assigned by the Supervising Judge.

Unless otherwise expressly authorized by law, a party requesting ex parte relief related to law and motion matters shall file the underlying motion prior to or contemporaneously with filing of the ex parte application. The ex parte application shall comply with California Rules of Court, rules 3.1200-3.1207. A request to schedule an ex parte hearing may be summarily denied without hearing when the request fails to meet the criteria set forth in California Rules of Court, rules 3.1200-3.1207. Ex parte applications submitted to seek scheduling relief from court setting guides or caps, but which do not otherwise seek relief from the Code of Civil Procedure or California rules of Court, may be summarily granted without a hearing.

An ex parte hearing shall be conducted only following the filing of the ex parte application and supporting paperwork, any underlying related motion, and proof of satisfaction of any filing fees. Prior to commencement of the hearing, the moving party shall file a declaration under penalty of perjury confirming that notice was provided to the opposing side, including the date, time, manner and

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name of any party so informed, and proof of service of any applicable papers.

(Subd (c) amended effective January 1, 2021; adopted effective July 1, 2009; previously amended effective January 1, 2018.)

(Rule 7.10 amended effective July 1, 2020; adopted effective July 1, 2009; previously amended effective January 1, 2018.)

7.11 DISCOVERY

a. **INFORMAL DISCOVERY CONFERENCES**

The procedure set forth in Local Rule 3.14 shall apply to informal discovery conferences brought in proceedings governed by Rule 7.

(Rule 7.11 adopted effective July 1, 2018; former Rule 7.11 renumbered as Rule 7.50 effective July 1, 2018.)

7.12 – 7.49 [RESERVED]

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7.50 APPOINTMENT OF SPECIAL ADMINISTRATOR

Except upon a showing of good cause for dispensing with notice, petitions for special letters of administration will not ordinarily be granted without the petitioning party giving notice in compliance with Probate Code section 8003 and 8110. Applications for special letters of administration may be requested ex parte, provided the application is prepared and submitted in compliance with Solano County Local Rules, rule 7.10, and California Rules of Court, rule 7.55.

(Rule 7.50 renumbered effective July 1, 2018; adopted as Rule 7.14 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered as Rule 7.11 effective July 1, 2009; former Rule 7.50 renumbered as Rule 7.100 effective July 1, 2018.)

7.51 INFORMATION TO BE CONTAINED IN PETITIONS FOR APPOINTMENT OF PERSONAL REPRESENTATIVE

a. INFORMATION TO BE INCLUDED WITH THE PETITION

Any petition seeking appointment of a personal representative shall contain the following information:

- (1) If the heir is a minor, the heir's date of birth.
- (2) The name of any and all nominated trustees of a trust created by the will.
- (3) The name of any and all trustees and beneficiaries of an inter vivos trust created by the decedent and that is in existence at the time of the decedent's death.
- (4) The name of any and all trustees of a special needs or other trust created to benefit the decedent and that is in existence at the time of the decedent's death.

(Subd (a) amended effective January 1, 2019; adopted effective July 1, 2009.)

b. INFORMATION CONCERNING A DECEASED BENEFICIARY

In addition to the information required in Rule 7.51(a), information concerning a deceased beneficiary shall be included in the petition as follows:

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- (1) If an heir or beneficiary dies before the decedent, that person should be listed with the notation that he or she is predeceased, and date of death. No notice need be given to the successors in interest of the predeceased person unless that person's interest has not lapsed by reason of death, in which case, notice should be given in the same manner as for the postdeceased heir or beneficiary.
- (2) If an heir or beneficiary dies after the decedent, that post-deceased person's name should be listed with the notation "deceased" and the person's date of death. If a personal representative has been appointed for that person's estate, the postdeceased heir or beneficiary should be listed in care of the name and address of the personal representative. If no personal representative has been appointed, that fact should be alleged, and notice given to the last known address of the postdeceased heir or beneficiary.
- (3) If a named beneficiary predeceased the decedent or did not survive the decedent for the designated survival period, that fact must be stated, together with the actual or approximate date of death.

(Subd (b) amended effective January 1, 2019; adopted effective July 1, 2009.)

c. COPY OF TRUST

Where notice is required to be given pursuant to Probate Code section 1208(b) (such as where a trust is a beneficiary of a decedent's estate), the petitioner shall file separately from the petition a true and correct copy of the trust, including any amendments, disclaimers, and any directions or instructions to the trustee that affect the disposition of the trust. Said document(s) shall be filed as a confidential document and shall not be released to any party except by court order.

(Subd (c) amended effective January 1, 2019; adopted effective January 1, 2018.)

(Rule 7.51 amended effective January 1, 2019; adopted as Rule 7.15 effective July 1, 1988; amended and renumbered as Rule 7.12 effective July 1, 2009; amended effective January 1, 2018; renumbered as rule 7.51 effective July 1, 2018; former Rule 7.51 renumbered as Rule 7.101 effective July 1, 2018.)

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7.52 PREPARATION OF ORDERS

a. PROPOSED ORDERS SUBMITTED PRIOR TO HEARING

Proposed orders shall be prepared by the petitioner’s attorney of record or the petitioner, if unrepresented, and shall be submitted at least four court days prior to the hearing.

(Subd (a) amended effective January 1, 2019; adopted effective July 1, 2009.)

b. MATERIAL TO BE INCLUDED IN PROBATE ORDERS

All orders in probate matters must be complete in and of themselves, so that their effect may be understood without reference to the underlying petition. The order shall set forth all matters actually passed on by the court, the relief granted, and the names of persons and descriptions of property or amounts of money affected with the same particularity required of judgments in civil matters. The court will not approve orders that merely recite that the petition as presented is granted or incorporate by reference the relief sought in the petition. However, in orders settling accounts, the court will ordinarily approve general language approving the account, the report, and the acts reflected therein. With the exception of attached schedules, no written matter shall appear after the judicial officer’s signature line.

(Subd (b) amended effective January 1, 2019; previously adopted as unlettered portion of Rule 7.19 effective July 1, 1988; adopted effective July 1, 2009.)

(Rule 7.52 amended effective January 1, 2019; adopted as Rule 7.18 effective July 1, 1988; amended and renumbered as Rule 7.13 effective July 1, 2009; renumbered as Rule 7.52 effective July 1, 2018; former Rule 7.52 renumbered as Rule 7.102 effective July 1, 2018.)

7.53 INTEREST ON FUNERAL AND INTERMENT CLAIMS

When accrued interest has been paid on delayed payment of claims for the reasonable costs of funeral expenses, a specific allegation must be made in the report accompanying the account in which credit has been taken for such payment, setting forth reasons for any delay in payment. The court will not allow credit for payment of interest when the delay in payment of the claims is not justified by the facts set forth. Interest for funeral and interment claims will be allowed only as provided by Health and Safety Code section 7101.

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(Rule 7.53 renumbered effective July 1, 2018; adopted as Rule 7.21 effective July 1, 1988; amended and renumbered as Rule 7.14 effective July 1, 2009; former Rule 7.53 renumbered as Rule 7.103 effective July 1, 2018.)

7.54 REAL ESTATE IN INVENTORY AND APPRAISAL

If a decedent's estate contains real property, the inventory and appraisal shall identify that property by its address and shall include a legal description of the property. If the parcel is unimproved, the inventory must so state.

(Rule 7.54 renumbered effective July 1, 2018; adopted as Rule 7.23 effective July 1, 1988; amended effective July 1, 1989; amended and renumbered as Rule 7.15 effective July 1, 2009; former Rule 7.54 renumbered as Rule 7.104 effective July 1, 2018.)

7.55 CASH DEPOSIT

A minimum cash deposit of ten percent (10%) of the purchase price (unless the loan proceeds exceed 90% of the purchase price), shall be deposited in escrow ten days prior to the confirmation of sale hearing date, and written verification of said deposit shall be filed with the court five (5) days prior to the confirmation of sale hearing date.

(Rule 7.55 renumbered effective July 1, 2018; adopted as Rule 7.24 effective July 1, 1988; previously amended effective July 1, 1989; renumbered as Rule 7.16 effective July 1, 2009; former Rule 7.55 renumbered as Rule 7.105 effective July 1, 2018.)

7.56 SECOND DEEDS OF TRUST

The court will approve the taking of a promissory note secured by a second deed of trust upon a showing that it serves the best interests of the estate.

(Rule 7.56 renumbered effective July 1, 2018; renumbered as Rule 7.17 effective July 1, 2009; former Rule 7.56 renumbered as Rule 7.106 effective July 1, 2018.)

7.57 EARNEST MONEY DEPOSIT BY OVERBIDDER

When a sale is confirmed to an overbidder, the overbidder must submit at the time of the hearing a certified or cashier's check in the amount of ten percent (10%) of the bid.

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(Rule 7.57 renumbered effective July 1, 2018; adopted as Rule 7.26 effective July 1, 1988; renumbered as Rule 7.18 effective July 1, 2009.)

7.58 APPEARANCES OF COUNSEL

In petitions for confirmation of sales of real estate and for sales of personal property where bidding is authorized, the court will ordinarily not proceed with the confirmation of the sale in the absence of the petitioner’s attorney, if the petitioner is represented. Where the personal representative, guardian or conservator is present and requests that the sale proceed, the court may do so, in its discretion.

(Rule 7.58 renumbered effective July 1, 2018; adopted as Rule 7.27 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered as Rule 7.19 effective July 1, 2009.)

7.59 CONDITIONAL SALES OF REAL PROPERTY

The court will ordinarily not approve a sale of real property which is conditioned upon the occurrence of a subsequent event (such as change in zoning or obtaining approval from an environmental control board). However, if unusual and extraordinary circumstances exist and the necessity and advantage to the estate are set forth in detail, the court may approve such a sale.

(Rule 7.59 renumbered effective July 1, 2018; adopted as Rule 7.30 effective July 1, 1988; amended and renumbered as Rule 7.20 effective July 1, 2009.)

7.60 BROKER’S COMMISSIONS

a. IMPROVED REAL PROPERTY

An agent or broker’s commission on the sale of improved real property shall not exceed six percent (6%). A copy of an executed broker's agreement shall be attached to the petition for confirmation of sale.

(Subd (a) amended effective July 1, 2009; adopted effective July 1, 1988; previously amended effective July 1, 1989.)

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b. UNIMPROVED REAL PROPERTY

An agent or broker's commission on the sale of unimproved or raw real property shall not exceed ten percent (10%). A copy of an executed broker's agreement shall be attached to the petition for confirmation of sale.

(Subd (b) amended effective July 1, 2009; adopted effective July 1, 1988; previously amended effective July 1, 1989.)

c. BROKER COMMISSIONS IN OVERBID SITUATIONS

Broker commissions in overbid situations are governed by Probate Code section 10160 et seq.

(Subd (c) amended effective July 1, 2009; adopted effective July 1, 1988; previously amended effective July 1, 1989.)

(Rule 7.60 renumbered effective July 1, 2018; adopted as Rule 7.31 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered as Rule 7.21 effective July 1, 2009.)

7.61 STATUTORY COMPENSATION FOR PERSONAL REPRESENTATIVE AND ATTORNEY FEES

a. INCLUSION OF COMPUTATION IN PETITION

The computation in Rule 7.61, subsection (b), must be made regardless of the estate's value and even though an accounting has been waived. For estates worth in excess of \$25,000,000.00 (twenty-five million dollars), the court shall determine the reasonable amount of compensation.

(Subd (a) adopted effective July 1, 2009.)

b. FORMAT OF REQUEST FOR STATUTORY COMPENSATION AND ATTORNEY FEES

The basis for statutory compensation and attorney fees requested shall be set out in the body of the petition for distribution or on a separate schedule as required per California Rules of Court, rule 7.705.

(Subd (b) adopted effective July 1, 2009; previously adopted as unlettered

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portion of Rule 7.36 effective July 1, 1988.)

(Rule 7.61 amended and renumbered effective July 1, 2018; adopted as Rule 7.36 effective July 1, 1988; amended and renumbered as Rule 7.22 effective July 1, 2009.)

7.62 PARTIAL ALLOWANCE OF STATUTORY COMPENSATION OR ATTORNEY FEES

a. COURT ORDER REQUIRED

A personal representative may not pay an advance on statutory compensation or attorney fees without prior court order. Petitions for an advance of statutory compensation or attorney fees may not be brought ex parte.

(Subd (a) adopted effective July 1, 2009.)

b. REQUIREMENT OF INVENTORY AND APPRAISAL; ACCOUNTS

Notwithstanding Probate Code section 10830, the court shall not consider a petition seeking an advance of statutory compensation or attorney fees unless the personal representative's Inventory and Appraisal is filed prior to or concurrently with the petition. The court prefers that attorney fees not be requested until the first account has been filed.

(Subd (b) adopted effective July 1, 2009.)

c. AMOUNT OF STATUTORY COMPENSATION OR ATTORNEY FEES PERMITTED AS AN ADVANCE

Any allowance for statutory compensation or attorney fees will be made in accordance with the work actually performed. Where no accounting is filed, the allowance may not exceed 50% of the statutory compensation computed upon the total value appearing in the inventories filed to that time. Where an accounting is filed, the allowance may not exceed 75% of the statutory compensation so computed.

(Subd (c) amended and relettered effective July 1, 2009; adopted as unlettered portion of Rule 7.37 effective July 1, 1988.)

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d. APPORTIONMENT OF FEES FOR SUCCESSIVE ATTORNEYS

Except in a case in which there is an agreement in writing on apportionment, where the personal representative has been represented by successive attorneys, fees will not ordinarily be apportioned to a prior attorney for the personal representative until the final accounting has been approved.

(Subd (d) amended and relettered effective July 1, 2009; adopted as unlettered portion of Rule 7.37 effective July 1, 1988.)

(Rule 7.62 renumbered effective July 1, 2018; adopted as Rule 7.37 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered as Rule 7.23 effective July 1, 2009.)

7.63 APPORTIONMENT OF STATUTORY COMPENSATION BETWEEN TWO OR MORE PERSONAL REPRESENTATIVES

If the statutory compensation is to be divided among co-personal representatives, the petition shall set out facts upon which the court can base the apportionment.

(Rule 7.63 renumbered effective July 1, 2018; adopted as Rule 7.38 effective July 1, 1988; amended and renumbered as Rule 7.24 effective July 1, 2009.)

7.64 EXTRAORDINARY COMPENSATION FOR PERSONAL REPRESENTATIVE; EXTRAORDINARY ATTORNEY FEES

a. CONTENTS OF PETITIONS OR DECLARATIONS FOR EXTRAORDINARY COMPENSATION OR FEES

All applications for extraordinary compensation for the personal representative's services and for extraordinary attorney's fees must be supported by a statement of facts in the petition or in a separate declaration. The statement of facts shall be fully compliant with California Rules of Court, rule 7.702. Records of time spent, such as billing statements or time logs, are not generally adequate in and of themselves to support extraordinary fees.

(Subd (a) amended effective January 1, 2019; adopted as unlettered portion of Rule 7.39 effective July 1, 1988; amended and relettered effective July 1, 2009.)

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**b. FACTORS THAT WILL NOT SUPPORT A REQUEST FOR
EXTRAORDINARY COMPENSATION OR FEES**

In the absence of special circumstances or problems articulated in the statement of facts filed per California Rules of Court, rule 7.702, the routine conduct of any proceeding relating to the collection of assets, processing of claims, conduct of estate administration or distribution will not justify an extraordinary fee.

(Subd (b) amended effective January 1, 2019; adopted as unlettered portion of Rule 7.39 effective July 1, 1988; amended and relettered effective July 1, 2009.)

(Rule 7.64 amended effective January 1, 2019; adopted as Rule 7.39 effective July 1, 1988; amended and renumbered as Rule 7.25 effective July 1, 2009; renumbered as Rule 7.64 effective July 1, 2018.)

7.65 DISTRIBUTIVE CONTINGENCIES

If the right of a beneficiary to distribution of part of the estate is dependent upon the occurrence of an event (e.g., death of a parent), the petition must allege the occurrence of that event and the order must contain a finding of the occurrence of that event.

(Rule 7.65 renumbered effective July 1, 2018; adopted as Rule 7.41 effective July 1, 1988; renumbered as Rule 7.26 effective July 1, 2009.)

**7.66 CONTENTS OF PETITION AND ORDER FOR PARTIAL OR FINAL
DISTRIBUTION**

a. WHEN PROPOSED ORDER REQUIRED

The proposed order for distribution shall be filed with any petition for partial or final distribution.

(Subd (a) amended effective January 1, 2019; adopted as unlettered portion of Rule 7.42 effective July 1, 1988; amended and relettered effective July 1, 2009.)

b. DESCRIPTION OF PROPERTY TO BE DISTRIBUTED

The distribution of property must be separately stated in detail in both the petition and the order, listing a description of the property to be distributed under the name of each heir or beneficiary. Real estate shall be legally described and each

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property's street address, if any, shall be included. The order must be complete in and of itself. Description by reference to the inventory is not acceptable. In both the petition and order for distribution, the distribution schedule shall include a summary showing the value of the estate distributed to each heir or beneficiary and the total estate distributed. If any heirs or beneficiaries previously received an early distribution, the petition and the order shall so state.

(Subd (b) amended effective January 1, 2019; amended and relettered effective July 1, 2009; adopted as unlettered portion of Rule 7.42 effective July 1, 1988; amended effective January 1, 2010.)

c. TRACING REQUIRED FOR INTESTATE DECEDENT

If an intestate decedent who survived their spouse leaves no issue, the applicability of Probate Code Section 6402.5 must be alleged and the necessary tracing must be carried out as far as possible.

(Subd (c) amended effective January 1, 2019; adopted as unlettered portion of Rule 7.42 effective July 1, 1988; amended and relettered effective July 1, 2009.)

d. OTHER ITEMS TO BE INCLUDED IN THE PETITION AND DECREE

(1) A petition and any order for distribution shall include the names and addresses of all persons who are present and future distributees of the estate, and shall indicate whether each person listed is an adult or a minor. In all cases where a minor is a distributee, the minor's age and birth date must be stated in the petition and the decree for distribution.

(Subd (1) adopted effective January 1, 2010.)

(2) If distribution will not be made directly to the heir or beneficiary, the name, address and fiduciary capacity of the recipient must be stated in the petition and the decree for distribution. If distribution is to be made to an assignee of an heir or beneficiary, a copy of the assignment and the terms thereof must be on file.

(Subd (2) amended effective January 1, 2019; adopted effective January 1, 2010; amended effective January 1, 2013.)

(3) If a reserve is sought, the petition for final distribution must specifically set forth the proposed use for the retained funds (e.g., income taxes, closing costs, property tax assessments, etc.).

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(Subd (3) adopted effective January 1, 2013.)

(Subd (d) amended effective January 1, 2019; adopted effective January 1, 2010 amended effective January 1, 2013.)

e. ACCOUNTING FOR RESERVE

If an order for final distribution of an estate of a decedent or trust includes a reserve of more than \$5,000, an informal accounting of the reserve shall be attached to the Ex Parte Petition for Final Discharge (Judicial Council form DE-295). The court in its discretion may set the request for discharge for hearing and require notice. The court may also impose the informal accounting requirement on reserves below \$5,000.

(Subd (e) amended effective July 1, 2023; adopted effective January 1, 2018.)

(Rule 7.66 amended effective January 1, 2019; adopted as Rule 7.42 effective July 1, 1988; previously amended effective July 1, 1989; amended and renumbered as Rule 7.27 effective July 1, 2009; amended effective January 1, 2010, January 1, 2013, and January 1, 2018; renumbered as Rule 7.66 effective July 1, 2018.)

7.67 DISTRIBUTIONS TO TRUSTS

a. DISTRIBUTIONS TO TESTAMENTARY TRUSTS

The provisions of an order for distribution establishing a testamentary trust shall include all of the terms of the will relating to the trust. Per California Rules of Court, rule 7.650, the provisions of the trust shall be stated in the present tense and in the third person, and shall not quote the will verbatim. If a trust beneficiary will receive distribution upon reaching a specific age, the petition for distribution and order thereon must state the age and birthdate of the beneficiary.

(Subd (a) amended effective January 1, 2019; adopted as unlettered portion of Rule 7.43 effective July 1, 1988; amended and relettered effective July 1, 2009; amended effective January 1, 2010.)

b. DISTRIBUTIONS TO INTER VIVOS TRUSTS

An order for distribution which distributes assets to an inter vivos trust shall

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name the trust and specify the name of the trustee to receive the assets. The order for distribution shall not be approved absent a declaration by the trustee that he or she has in fact accepted the trust. The order for distribution for a decedent's estate shall not name as beneficiaries of the estate in the distribution plan any beneficiaries who are entitled to distributions from the trust.

(Subd (b) amended effective January 1, 2019; adopted effective July 1, 2009.)

(Rule 7.67 amended effective January 1, 2019; adopted as Rule 7.43 effective July 1, 1988; amended and renumbered as Rule 7.28 effective July 1, 2009; amended effective January 1, 2010; renumbered effective July 1, 2018.)

7.68 JOINT TENANCY ASSETS

In the absence of prior court determination or authorization, joint tenancy assets of the decedent and a person other than the decedent's spouse should not be inventoried as assets of the probate estate. However, an asset held in joint tenancy between the decedent and the decedent's spouse, or former spouse in appropriate cases, shall be inventoried if there is an unadjudicated allegation that the asset is in fact community property. A notation concerning the allegation shall be included in all inventory and appraisals until the asset's characterization is determined.

(Rule 7.29 amended and renumbered effective July 1, 2009; adopted as Rule 7.49 effective July 1, 1988; former Rule 7.29, which concerned increased bid forms, repealed effective July 1, 2009.)

7.69 PERSONAL REPRESENTATIVE COMPENSATION AND ATTORNEY FEES IN CONNECTION WITH TERMINATION OF A JOINT TENANCY OR HANDLING OF OTHER NONPROBATE ASSETS

Assets that pass outside of probate are outside the court's jurisdiction. Therefore, a personal representative or his or her attorney shall not request payment from a probate estate for work done concerning joint tenancy assets or other nonprobate assets, and any request for such relief shall be denied. However, this rule does not prevent a request for extraordinary fees where the termination of joint tenancy with a previously deceased joint tenant is necessary to clear title to property in the decedent's estate.

(Rule 7.69 renumbered effective July 1, 2018; adopted as Rule 7.50 effective July 1, 1988; amended and renumbered as Rule 7.30 effective July 1, 2009.)

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7.70 COURT INVESTIGATOR FEES FOR INVESTIGATION OF PETITION FOR PARTICULAR TRANSACTION

Pursuant to Probate Code section 3140, the court may, in its discretion, appoint a court investigator to evaluate a petition for a proposed transaction involving an incapacitated spouse's community property and report to the court regarding the transaction's advisability. Appointment of a court investigator for such an investigation shall result in an assessment against the petitioning party for the costs of the investigation. The fee amount is determined by the court on an annual basis and is subject to change. The assessed fee is payable within 30 days after the Assessment and Order for Payment is mailed by the Court Investigators Office.

(Rule 7.70 renumbered effective July 1, 2018; adopted as Rule 7.31 effective July 1, 2009.)

7.71 WAIVERS OF ACCOUNT

Any waiver of account presented under Probate Code 10954 shall be filed using either the local form adopted for that purpose or a pleading containing the same information as the local form.

A waiver of account may be filed prior to or concurrently with a petition for distribution (whether preliminary or final) or with a status report. The court will not accept a waiver of account for a personal representative signed or filed prior to that personal representative's appointment.

(Rule 7.71 adopted effective January 1, 2019; former Rule 7.71 renumbered as Rule 7.74 effective January 1, 2019.)

7.72 REIMBURSEMENT OF EXPENSES OF ESTATE ADMINISTRATION

a. EXPENSES THAT MAY BE REIMBURSED

The following may be reimbursed to a personal representative and/or a personal representative's counsel as expenses of administration:

- (1) Court filing fees and other court costs;
- (2) Newspaper publication fees;
- (3) Surety bond premium;

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- (4) Probate referee appraisal fees; and,
- (5) Other expenses specifically approved by the court.

b. EXPENSES THAT MAY NOT BE REIMBURSED

Unless the requesting party demonstrates extraordinary circumstances, the following will not ordinarily be reimbursed to a personal representative and/or a personal representative's counsel as expenses of administration:

- (1) Secretarial and word processing time;
- (2) Computer time, including expenses incurred in performing computerized legal research;
- (3) Local telephone calls;
- (4) Facsimile transmissions;
- (5) Local mileage and parking;
- (6) Postage, including fees for delivery by a parcel service;
- (7) Photocopies; and,
- (8) Travel and meals.

(Rule 7.72 renumbered effective July 1, 2018; adopted as Rule 7.33 effective January 1, 2013; previously amended effective January 1, 2018.)

7.73 SPOUSAL PROPERTY PETITIONS

a. APPLICABILITY

- (1) If a Spousal Property Petition seeks to confirm and/or transfer property alleged to be community property or quasi-community property in whole or in part, the petitioner shall comply with the requirements in this rule.
- (2) Notwithstanding (1), *supra*, the requirements of subdivision (b) shall not apply if:

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- (a) The entire estate of the decedent passes to the surviving spouse under a will or pursuant to interstate succession; and,
- (b) One of the following is true:
 - 1. The petition only seeks determination of the passing of the property without a finding of the character (community or separate) of the property;
 - 2. The decedent and surviving spouse executed a written agreement transmuting or confirming all property owned at the date of the agreement and all after-acquired property into community property; or
 - 3. The decedent and surviving spouse executed a written agreement which transmuted or confirmed the subject property to community property and the date of acquisition of the subject property is alleged.
- (c) If (b)(2) or (b)(3) above applies, copies of all such agreements must be attached to the petition.

(Subd. (a) adopted effective January 1, 2018.)

b. CONTENTS OF PETITION

- (1) The petition shall state the date and place of marriage between the decedent and surviving spouse.
- (2) The petition shall give a description and approximate values of real and personal property owned by the decedent on the date of marriage and a statement concerning the property's disposition, if any.
- (3) If the decedent and a surviving spouse were not domiciled in California at the time of marriage or resided in another state at any point following marriage, the petition shall provide the approximate dates the decedent and a surviving spouse resided in California.
- (4) For each personal property asset at issue in the petition, the petition shall state:
 - (a) The approximate date of the asset's acquisition;

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- (b) The source of funds used to acquire the asset;
 - (c) The form of title at the time of the asset’s acquisition, if any;
 - (d) A description of any changes to the form of title following acquisition, if any;
 - (e) The form of title on the decedent’s date of death, if any;
 - (f) Facts upon which the claim of community or quasi-community property is based; and,
 - (g) If the asset at issue is an individual retirement account (“IRA”), life insurance policy, or other asset that has a beneficiary designation or “pay on death” designation, the status of that designation as of the decedent’s date of death including the names of beneficiaries or payees.
- (5) For each real property asset at issue in the petition, the petition shall state:
- (a) The approximate date of the asset’s acquisition;
 - (b) The source of funds used to acquire the asset;
 - (c) The form of title at the time of the asset’s acquisition;
 - (d) A description of any changes to the form of title following acquisition;
 - (e) The form of title on the decedent’s date of death;
 - (f) Written evidence of transmutations for all assets acquired or transmuted on or after January 1, 1985; and,
 - (g) Facts upon which the claim of community or quasi-community property is based.
- (6) The petition shall include the following additional attachments:
- (a) Where the petition affects title to real property, a copy of the deed(s) showing vesting at the decedent’s date of death shall

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be attached to the petition.

- (b) If the petitioner claims one or more agreements exist that provide for a non pro-rata division of the aggregate value of the community property and/or quasi-community property, copies of the agreement(s) shall be attached to the petition.
- (c) If the asset in question was acquired on or after January 1, 1985 or had the form of title changed on or after January 1, 1985, the petition shall provide written evidence of the acquisition documents and subsequent transmutations.
- (d) Where the petitioner is the personal representative or the conservator of the spouse or domestic partner, a copy of letters evidencing the appointment must be attached to the petition.

(Subd. (b) adopted effective January 1, 2018.)

c. PETITIONS WHERE THE DECEDENT DIED TESTATE

- (1) If a Spousal Property Petition is based upon the decedent's will or codicil, the will or codicil shall be filed with the court prior to or concurrent with the filing of the petition.
- (2) An original will shall be deposited with the court pursuant to Probate Code section 8200.
- (3) If the original will has been deposited with a foreign jurisdiction (e.g. another state or country), a duly authenticated copy of the will shall be filed as an attachment to the petition.
- (4) If the original will is lost, a copy of the lost will or a document setting forth the terms of the lost will shall be filed as an attachment to the petition. The attachment must clearly indicate that the original will is lost, and shall be accompanied by a declaration addressing the presumption of revocation under Probate Code section 6124.
- (5) If a spouse's right to take under a will is conditioned on survival for a specified period of time, no property will be set aside or confirmed to the spouse until the expiration of the survivorship period.

(Subd. (c) adopted effective January 1, 2018.)

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d. TERMINOLOGY

The following definitions shall apply to this rule:

- (1) The term “Spousal Property Petition” shall include “Domestic Partner Property Petition.”
- (2) The term “spouse” shall include registered domestic partner under California law and the equivalent in civil unions in other jurisdictions.
- (3) The term “marriage” shall include registered domestic partnerships under California law and equivalent civil unions in other jurisdictions.
- (4) The term “date of marriage” shall include the date a domestic partnership is registered under California law and the date an equivalent civil union is entered into in other jurisdictions.

(Subd. (d) adopted effective January 1, 2018.)

(Rule 7.73 renumbered effective July 1, 2018; adopted as Rule 7.34 effective January 1, 2018.)

7.74 DOCUMENTS SIGNED BY PERSON WITH POWER OF ATTORNEY

Any document filed with the court on behalf of an heir or beneficiary that is signed by a person with power of attorney for that heir or beneficiary shall include a copy of the power of attorney granting authority to execute such document. This includes but is not limited to waivers of accounting, waivers of bond, and distribution receipts.

(Rule 7.74 renumbered and amended effective January 1, 2019; adopted as Rule 7.32 effective July 1, 2010; renumbered as Rule 7.71 effective July 1, 2018.)

7.75 ORDER TO CONFIRM STATUTORY AUTHORITY OF PUBLIC ADMINISTRATOR

Pursuant to Probate Code sections 7600 et. seq, the Public Administrator is required to take control of a decedent’s property that is subject to loss, injury or waste for the purpose of protecting the estate until lawful disposition can be made when there has been no personal representative appointed or otherwise authorized individual available to administer decedent’s estate. To fulfill this statutory duty,

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the Public Administrator is authorized to submit an Ex Parte Application for Order as a miscellaneous proceeding supported by a declaration establishing the statutory authority of the Public Administrator to act.

(Rule 7.75 adopted effective July 1, 2022.)

7.76 – 7.99 [RESERVED]

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7.100 TRUST BENEFICIARIES TO BE LISTED IN PETITION

All petitions involving a trust must set forth the names and last known addresses of all vested and contingent beneficiaries.

(Rule 7.100 amended effective January 1, 2019; adopted as Rule 7.45 effective July 1, 1988; amended and renumbered as Rule 7.50 effective July 1, 2009; renumbered effective July 1, 2018.)

7.101 TRUSTEE FEES

a. **APPLICABILITY OF RULE**

This rule applies to all trusts subject to the continuing jurisdiction of the court, to petitions for approval of trustee compensation, and to objections to petitions for trustee compensation.

(Subd (a) adopted effective July 1, 2009.)

b. **PRESUMPTION OF REASONABLE COMPENSATION FOR TRUSTEES**

Trustee compensation shall be presumed reasonable if it does not exceed 1% (one percent) of the asset value of the estate. However, nothing in this rule limits the court's discretion to find as unreasonable a fee totaling less than 1%, or to approve a trustee's fee that exceeds 1%. The petition shall provide the asset value of the estate used to calculate compensation and shall explain why that value is appropriately used.

(Subd (b) amended effective January 1, 2019; adopted effective July 1, 2009; amended effective January 1, 2012.)

c. **REQUEST FOR ADDITIONAL COMPENSATION**

A trustee may request fees in excess of 1% (one percent) of the asset value of the estate. A trustee requesting such relief shall do one of the following:

- (1) File a declaration from the beneficiaries indicating awareness of the fees being requested and a statement waiving objection to those fees.

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- (2) File a declaration detailing the services rendered justifying the fee requested.

(Subd (c) amended and relettered effective July 1, 2009; adopted as unlettered portion of Rule 7.46 effective July 1, 1988.)

(Rule 7.101 amended effective January 1, 2019; adopted as Rule 7.46 effective July 1, 1988; previously amended effective July 1, 1988; amended and renumbered as Rule 7.51 effective July 1, 2009; amended effective January 1, 2012; renumbered effective July 1, 2018.)

7.102 INFORMATION TO BE INCLUDED IN PETITIONS CONCERNING TRUSTS

All petitions concerning trusts shall indicate in the pleading title the Probate Code section(s) under which the petition is brought or which supports the relief requested. For example, a petition seeking orders concerning the internal affairs of a trust shall cite Probate Code section 17200 in the pleading title.

(Rule 7.102 renumbered effective July 1, 2018; adopted as Rule 7.52 effective July 1, 2009.)

7.103 GENERAL PROCEDURES FOR SPECIAL NEEDS TRUSTS

a. ESTABLISHMENT OF SPECIAL NEEDS TRUSTS IN SOLANO COUNTY

If a special needs trust is included as part of a minor’s compromise or other judgment entered in Solano County, the following procedures shall be followed:

- (1) A petition to approve the terms of the special needs trust shall be filed in the civil action or as part of a petition to approve minor’s compromise. The judge assigned to hear the civil action or the petition to approve minor’s compromise shall approve the terms of the special needs trust per Probate Code section 3604. The petition shall include the complete terms of the proposed trust.

Once so approved and signed, the original special needs trust instrument and a copy of the order approving the trust shall be filed in the county in which the trust is to be administered pursuant to that county’s procedures. If the trust is to be administered in Solano County, the trust shall be filed in a separate file and assigned a probate case number. No filing fee shall

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be charged for said filing as the trust instrument is the result of a petition filed to approve a minor’s compromise claim per Probate Code section 3600 et seq. (Gov. Code, § 70655.) If the original trust is unavailable for filing, a copy of the entire executed trust instrument shall be filed concurrently with an affidavit by the trustee stating why the original is not available for filing and affirming that the copy is a true and correct copy of the executed trust instrument.

- (2) The party filing the special needs trust instrument per subsection (2) shall file a notice in the civil action file or the minor’s compromise file indicating the county in which the trust is being administered and the case number assigned to the probate file containing the special needs trust.

(Subd (a) amended effective January 1, 2019; adopted effective July 1, 2009; amended effective January 1, 2012.)

b. TRANSFER OF SPECIAL NEEDS TRUSTS INTO SOLANO COUNTY

Whenever a special needs trust is transferred into Solano County and the court file being transferred does not contain the original special needs trust instrument, the trustee shall provide the court with the original trust document within 90 days after the court file is received by Solano County. If the original trust is unavailable for filing, a copy of the entire executed trust instrument shall be filed concurrently with an affidavit by the trustee stating why the original is not available for filing and affirming that the copy is a true and correct copy of the executed trust instrument.

(Subd (b) amended effective January 1, 2019; adopted effective July 1, 2009.)

(Rule 7.103 amended effective January 1, 2019; adopted as Rule 7.53 effective July 1, 2009; amended effective January 1, 2012; renumbered as Rule 7.103 effective July 1, 2018.)

7.104 ACCOUNTINGS AND REPORTS OF SPECIAL NEEDS TRUSTS

a. EXPENDITURES ON BEHALF OF BENEFICIARY

In all accountings for special needs trusts, the trustee shall provide an explanation of any unusual or extraordinary expenses incurred by the trustee on behalf of the beneficiary. These include, but are not limited to, payment of all expenses associated with real property partially owned by the trust, payment of automobile insurance for a vehicle not owned by the trust, acquisition or maintenance of

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assets not ordinarily used by a beneficiary with the beneficiary’s type of disability, and so forth.

(Subd (a) adopted effective July 1, 2009.)

b. HIRING OF AGENTS

The court acknowledges that trustees of special needs trusts often hire agents to advise them concerning the administration of the special needs trusts and the provision of services to the beneficiary. A trustee hiring such an agent shall specify in any report or accounting seeking approval of payment to said agent the type of and need for the services provided by the agent. The trustee shall also include a declaration from the agent concerning the hours spent working with the trustee and the amount of compensation sought.

(Subd (b) adopted effective July 1, 2009.)

c. PARENTS AS CAREGIVERS TO CHILD AS BENEFICIARY

In an account or report indicating that a parent was hired to provide caregiver services to his or her child, the trustee shall provide the following information:

- (1) A description of the services rendered by the parent that are above and beyond the care normally provided by a parent to a child.
- (2) A description of the special skills possessed by the parent enabling him or her to perform these services.
- (3) The benefit to the beneficiary of having the parent perform the services instead of a professional caregiver.
- (4) The hours worked by the parent.
- (5) The hourly rate being paid to the parent and a justification of that rate. Justification may include a comparison to the rate charged by a professional for the same or similar services.
- (6) Whether caregiving services are being provided through IHSS and if so, the frequency and type of the services provided.
- (7) Whether insurance is in place to cover the caregiver parent in case of injury and if so, the amount of the periodic premium being paid by the parent or the trust.

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(Subd (c) adopted effective July 1, 2009.)

(Rule 7.104 renumbered effective July 1, 2018; adopted as Rule 7.54 effective July 1, 2009.)

7.105 COMPENSATION OF CONSERVATOR FROM TRUST

If a conservatee is also the beneficiary of a trust and the compensation of a conservator of the person or estate, or his or her attorney, is sought from the trust in part or in whole, the conservator shall first seek approval of the compensation in the conservatorship matter. The petition shall include a declaration by the trustee as to whether there are sufficient funds in the trust to allow for the compensation sought. If the conservatorship of the estate has sufficient funds to pay for the requested compensation, the conservator shall explain why compensation is sought from the trust and not the estate. A trustee shall not pay a conservator's compensation without a court order approving said compensation by the judge assigned to hear the conservatorship matter.

(Rule 7.105 renumbered effective July 1, 2018; adopted as Rule 7.55 effective July 1, 2009; amended effective January 1, 2012.)

7.106 TRUST ACCOUNTINGS FILED WITH THE COURT

Any time a petition seeking approval of a trust accounting is filed with the court, the filing party shall simultaneously submit to the court an additional courtesy copy of the petition and the accounting.

(Rule 7.106 renumbered effective July 1, 2018; adopted as Rule 7.56 effective July 1, 2010.)

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Rule 8 – Compromises of Claims

8.1 CONTENTS OF PETITION FOR COMPROMISE OF CLAIM OF A PERSON WITH A DISABILITY OR A MINOR

A petition for court approval of a compromise or covenant not to sue regarding a person with a disability or a minor shall comply in all respects with California Rules of Court, rule 3.1384, and shall be presented on the mandatory Judicial Council form MC-350. In addition, the petition shall include:

- (1) A full disclosure of all information concerning the reasonableness of the proposed compromise or covenant not to sue, including the amounts, if any, paid to other claimants.
- (2) The original or a photocopy of each bill which, if paid, shall disclose the date of payment, the amount paid, and the name of the payor.

(Rule 8.1 amended effective July 1, 2014; adopted effective July 1, 1988; previously amended effective July 1, 2009, and January 1, 2010, and July 1, 2010.)

8.2 FILING PETITIONS FOR COMPROMISE OF CLAIMS

In cases where no action is pending, a petition to compromise either a minor's claim or a claim of an adult with disabilities shall be filed as an independent case with the Probate Division.

In cases where a civil action is pending, a petition to compromise either a minor's claim or a claim of an adult with disabilities shall be filed within the pending civil action.

(Rule 8.2 adopted effective July 1, 2014.)

8.3 ESTABLISHMENT OF SPECIAL NEEDS TRUSTS

If a compromise of claim or covenant not to sue includes the establishment of a special needs trust with a person with a disability or a minor as beneficiary, the establishment of the trust shall comply with Solano County Local Rules, rule 7.53.

(Rule 8.3 amended effective July 1, 2014; adopted effective July 1, 2009; previously amended effective January 1, 2010, and July 1, 2010; previous Rule 8.3, concerning representation of specified parties by counsel at hearings, repealed effective July 1, 2009.)

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**Rule 9 – Attorney Fees in Default Matters,
Promissory Notes, Contracts, and Foreclosures**

9.1 ATTORNEY FEES - UNLIMITED CIVIL MATTERS

a. RECOVERY OF “REASONABLE” ATTORNEY FEES IN DEFAULT CASES

Except in open book accounts, whenever the obligation sued upon provides for the recovery of “reasonable” attorney fees and the matter is heard as an unlimited civil matter, the fees in each default case shall be fixed, based on the principal amount only, pursuant to the schedule set forth in subsection (d).

(Subd (a) amended effective January 1, 2012; adopted effective May 13, 1988; amended effective January 1, 2009.)

b. ATTORNEY FEES IN JUDGMENTS ISSUED BY THE CLERK OF THE COURT

Except in open book accounts, in unlimited civil matters where the Clerk of the Court may issue a Judgment, attorney fees shall be calculated using the schedule set forth in subsection (d).

(Subd (b) amended effective January 1, 2009; adopted effective May 13, 1988.)

c. REQUEST FOR FEES IN EXCESS OF SCHEDULED FEES

Any attorney seeking fees in excess of those provided for in subsection (d) shall be required to apply for a hearing on the Default Calendar and supply an affidavit in accordance with Code of Civil Procedure section 585.

(Subd (c) amended effective January 1, 2009; adopted effective May 13, 1988.)

d. SCHEDULE OF ATTORNEY FEES

Attorney fees shall be calculated using the following formula:

25% of the first \$1,000 (with a minimum of \$150)
20% of the next \$4,000
15% of the next \$5,000
10% of the next \$10,000
5% of the next \$30,000
2% over \$50,000

An example of this calculation appears in Appendix A to Rule 9.

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**Rule 9 – Attorney Fees in Default Matters,
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(Subd (d) amended effective January 1, 2010; adopted effective May 13, 1988.)

e. ATTORNEY FEES IN UNLAWFUL DETAINER ACTIONS

The fee schedule set forth in Rule 9.1 shall not apply to unlawful detainer actions, which are governed by Rule 14.2.

(Subd (e) adopted effective January 1, 2010.)

(Rule 9.1 amended effective January 1, 2012; adopted effective May 13, 1988; amended effective January 1, 2009, and January 1, 2010.)

9.2 ATTORNEY FEES - LIMITED CIVIL MATTERS

a. ATTORNEY FEES FOR DEFAULT LIMITED CIVIL MATTERS (CCP §585(a))

Except for open book accounts, attorney fees in default limited civil matters shall be calculated on the principal obligation only per the schedule set forth in subsection (c), subject to any limitations set forth elsewhere in Rule 9.

(Subd (a) amended effective January 1, 2012; adopted effective May 13, 1988; amended effective January 1, 2009.)

b. REQUEST FOR FEES IN EXCESS OF SCHEDULED FEES

Any attorney seeking fees in excess of those provided for by the schedule in subsection (c) is required to apply for a hearing on the Default Calendar or supply an affidavit in accordance with Code of Civil Procedure section 585(d).

(Subd (b) amended effective January 1, 2009; adopted effective May 13, 1988.)

c. SCHEDULE OF ATTORNEY FEES

<u>Amount</u>	<u>Fees</u>
\$1.00 to \$600.00	\$150.00
\$600.00 to \$1,000.00	\$150.00 plus 25% of amount over \$600.00
\$1,000.00 to \$10,000.00	\$250.00 plus 15% of amount over \$1,000.00
\$10,000.00 to \$25,000.00	\$1,600.00 plus 10% of amount over \$10,000.00

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**Rule 9 – Attorney Fees in Default Matters,
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(Subd (c) amended effective January 1, 2009; adopted effective May 13, 1988.)

d. ATTORNEY FEES IN UNLAWFUL DETAINER ACTIONS

The fee schedule set forth in Rule 9.2 shall not apply to unlawful detainer actions, which are governed by Rule 14.3.

(Subd (d) amended effective January 1, 2010; adopted effective May 13, 1988.)

(Rule 9.2 amended effective January 1, 2012; previously adopted as unlettered portion of Rule 9.1 effective May 13, 1988; adopted as Rule 9.2 effective January 1, 2009; amended effective January 1, 2010.)

9.3 OPEN BOOK ACCOUNTS - UNLIMITED AND LIMITED CIVIL

a. ATTORNEY FEES IN OPEN BOOK ACCOUNTS

Subject to subsection (b), attorney fees in all open book accounts shall be calculated on the principal obligation only pursuant to the following schedule:

<u>Amount</u>	<u>Fees</u>
\$1.00 to \$600.00	\$150.00
\$600.00 to \$1,000.00	\$150.00 plus 25% of amount over \$600.00
\$1,000.00 to \$10,000.00	\$250.00 plus 15% of amount over \$1,000.00
\$10,000.00 to \$25,000.00	\$1,600.00 plus 10% of amount over \$10,000.00

(Subd. (a) amended effective January 1, 2012.)

b. MAXIMUM ALLOWABLE ATTORNEY FEES IN OPEN BOOK ACCOUNTS

The maximum fee allowable in open book accounts shall be as set forth in Civil Code section 1717.5.

(Subd. (b) amended effective July 1, 2016; previously amended effective January 1, 2012.)

(Rule 9.3 amended effective July 1, 2016; adopted effective January 1, 2009; previously amended effective January 1, 2012.)

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**Rule 9 – Attorney Fees in Default Matters,
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APPENDIX

9-A: Example of Attorney Fee Calculation per Rule 9.1

Demand of Complaint - \$54,000.00

1. 25% of the first \$1,000 = \$250.00 (the minimum fee of \$150 would apply if the amount of the demand was under \$1,000)
Subtract \$1,000 from the total demand of the complaint - \$54,000 - \$1,000 = \$53,000
2. 20% of the next \$4,000 = \$800
Subtract \$4,000 from the remaining balance - \$53,000 - \$4,000 = \$49,000
3. 15% of the next \$5,000 = \$750
Subtract \$5,000 from the remaining balance - \$49,000 - \$5,000 = \$44,000
4. 10% of the next \$10,000 = \$1,000
Subtract \$10,000 from the remaining balance - \$44,000 - \$10,000 = \$34,000
5. 5% of the next \$30,000 = \$1,500
Subtract \$30,000 from the remaining balance - \$34,000 - \$30,000 = \$4,000
6. 2% over \$50,000 (this percent should be calculated on any remaining amount, in this instance \$4,000) – 2% of \$4,000 = \$80

Total attorney's fees: \$4,380

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Rule 10 – Administration

10.1 EXECUTIVE OFFICER

A majority of the judges of the court may appoint a court executive officer pursuant to section 71620 of the Government Code who also acts as jury commissioner and clerk of the court. Any reference in these rules, the California Rules of Court, or statutes, to the executive officer, clerk of the court or jury commissioners refers to the executive officer, who functions in each of these capacities.

The powers, duties and responsibilities transferred from the county clerk to the court executive officer pursuant to this rule include all of those performed by the county clerk with respect to court sections, proceedings and records.

The county clerk is hereby relieved of any obligation imposed by law with respect to the above powers, duties and responsibilities. This rule does not transfer from the county clerk to the court executive officer obligations in reference to the issuance of marriage licenses or the filing of fictitious business names.

(Rule 10.1 amended effective January 1, 2010; adopted effective July 1, 1988.)

10.2 RESERVATION OF GOVERNMENT CODE 71620 POWERS

The Court reserves the power to delegate to the Court Executive Officer any other functions, duties and responsibilities relating to the operation of the court not otherwise specifically set forth in this chapter, as provided for by Government Code 71620.

(Rule 10.2 amended and renumbered effective January 1, 2010; adopted as Rule 10.4 effective January 1, 1991; former Rule 10.2, which concerned transfer of staff, repealed effective January 1, 2010.)

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Rule 11 – Jury Management

11.1 DISCRETION TO EXCUSE JURORS FOR UNDUE HARDSHIP

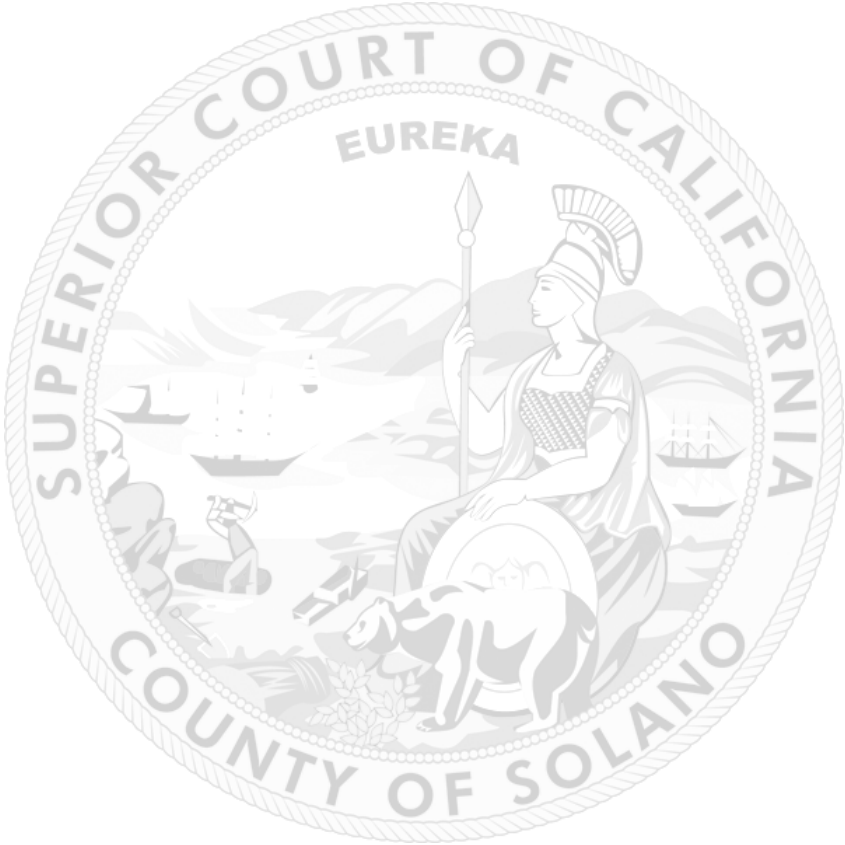
The jury commissioner or their designee shall have the authority and discretion to excuse prospective jurors for reasons of undue hardship pursuant to California Rules of Court, rule 2.1008, subdivisions (d)(1 – 7).

In order to provide the Court with the required verification of the undue hardships described above, prospective jurors may access and submit an online juror hardship questionnaire at: www.solano.courts.ca.gov.

(Rule 11.1 adopted effective July 1, 2018, amended effective July 1, 2022)

11.2 – 11.99 [Reserved]

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Rule 12 – Mental Health Conservatorships (LPS)

12.1 CONFIDENTIALITY OF COURT PROCEEDINGS AND RECORDS

All court proceedings brought pursuant to the Lanterman-Petris-Short Act, Part 1 (commencing with Section 5000) of Division 5 of the Welfare and Institutions Code, including court trials, jury trials, and other hearings, and all court records associated with or concerning said proceedings, shall be confidential and closed to the public, unless a conservatee requests that their proceeding be open to the public or the court finds good cause to make a particular proceeding open to the public. (*Sorenson v. Superior Court* (2013) 219 Cal.App.4th 409.) For purposes of this rule, the term “conservatee” includes a proposed conservatee and a person whose existing LPS conservatorship is subject to renewal or extension.

(Rule 12.1 adopted effective January 1, 2019.)

12.2 – 12.99 [Reserved]

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Rule 13 – Appeals

13.1 FEE WAIVER APPLICATIONS FOR MATTERS BEING APPEALED TO THE COURT OF APPEAL

a. FEE WAIVER REQUEST PROCEDURE GENERALLY

Where a party appealing a matter seeks a waiver of court fees and costs from the Superior Court of California, County of Solano as well as from the First District Court of Appeal and a fee waiver request has not been filed directly with the First District Court of Appeal, the party shall submit two separate Request to Waive Court Fees forms (Judicial Council form FW-001) to the Clerk of the Superior Court. One form shall be directed to the superior court and the other form shall be directed to the First District Court of Appeal.

(Subd (a) adopted effective January 1, 2010.)

b. PROCEDURE FOR WAIVING FEES AT THE SUPERIOR COURT

The request to waive fees on appeal at the superior court level shall be processed and determined per Government Code section 68630 et seq.

(Subd (b) adopted effective January 1, 2010.)

c. PROCEDURE FOR WAIVING FEES AT THE COURT OF APPEAL

The superior court shall receive and transmit to the First District Court of Appeal for filing, processing and determination any fee waiver which seeks to waive fees charged by the First District Court of Appeal. The superior court's acceptance of the FW-001 form on behalf of the Court of Appeal shall not be deemed a "filing" for purposes of Government Code section 68634.5, subdivision (f).

(Subd (c) adopted effective January 1, 2010.)

(Rule 13.1 adopted effective January 1, 2010.)

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Rule 14 – Unlawful Detainer

14.1 TELEPHONIC APPEARANCES

Telephonic appearances in unlawful detainer cases will be permitted only to the extent authorized by California Rules of Court, rule 3.670, and in the manner required by that rule and Solano County Local Rules, rule 4.12(h).

(Rule 14.1 amended effective January 1, 2010; adopted effective January 1, 2009.)

14.2 TRIAL MANAGEMENT

The court may, in its discretion, order the parties to an unlawful detainer matter to participate in a trial management conference and/or settlement conference in cases where the case is to be tried by a jury.

(Rule 14.2 adopted effective January 1, 2010.)

14.3 ATTORNEY FEES IN DEFAULT MATTERS

a. CASES FILED AS LIMITED CIVIL MATTERS

In default unlawful detainer actions filed as limited civil matters, the attorney fees are fixed upon the schedule set forth in subsection (c), based on principal only, with a minimum of \$300.00. The maximum fee shall not exceed the court's jurisdiction. Any attorney seeking fees in an unlawful detainer action in excess of those provided for by the schedule in subsection (c) is required to apply for a hearing on the Default Calendar or supply an affidavit in accordance with Code of Civil Procedure section 585(d).

(Subd (a) amended effective January 1, 2012; previously adopted as unlettered portion of Rule 9.1 effective May 13, 1988; amended and relettered as Subd (d) of Rule 9.1 effective January 1, 2009; adopted as subd (a) effective January 1, 2010.)

b. CASES FILED AS UNLIMITED CIVIL MATTERS

In default unlawful detainer actions filed as unlimited civil matters, the attorney fees are fixed upon the schedule set forth in subsection (c), based on principal only, with a minimum of \$300.00. Any attorney seeking fees in an unlawful detainer action in excess of those provided for by the schedule in subsection (c) is required

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to apply for a hearing on the Default Calendar or supply an affidavit in accordance with Code of Civil Procedure section 585(d).

(Subd (b) amended effective January 1, 2012; adopted effective January 1, 2010.)

c. SCHEDULE OF ATTORNEY FEES

Attorney fees in unlawful detainer actions shall be calculated as follows:

25% of the first \$1,000, with a minimum of \$300
15% of the next \$9,000
10% of the next \$15,000

(Subd (c) adopted effective January 1, 2010.)

(Rule 14.3 amended effective January 1, 2012; adopted effective January 1, 2010.)

14.4 DEMURRERS, MOTIONS TO STRIKE AND OTHER MOTIONS WITH NO SPECIFIC STATUTE STATING OTHERWISE

To effect the summary intent of the unlawful detainer statutes, the Court finds good cause to set unlawful detainer hearings on all demurrers, motions to strike, and any other motions for which there is no specific statute stating otherwise pursuant to Code of Civil Procedure §1167.4, and treat said motions for scheduling purposes as motions to quash. Code of Civil Procedure §1179a; Greener v. WCAB (1993) 6 Cal. 4th 1028, 1036; Delta Imports, Inc. v. Municipal Court (1983) 146 Cal. App. 3d 1033.

(Rule 14.4 adopted effective July 1, 2022.)

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Rule 15 – Guardianships and Conservatorships

PART ONE: Guardianships

15.1 APPLICABILITY OF GUARDIANSHIP RULES; TERMINOLOGY; DIRECT CALENDARING

a. APPLICABILITY

These guardianship rules apply to all guardianships of the person, the estate, or both, which are filed pursuant to the Probate Code. These guardianship rules do not apply to guardianships under the Welfare and Institutions Code.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009; amended effective January 1, 2012.)

b. TERMINOLOGY

Unless otherwise indicated in a particular rule, all references to a “ward” shall include a proposed ward and references to a “guardian” shall include a proposed guardian.

(Subd (b) relettered effective January 1, 2013; adopted as subd (c) effective July 1, 2009; previous subd (b) repealed effective January 1, 2013.)

c. DIRECT CALENDARING

When a guardianship or conservatorship case is filed, or received and filed as a transfer from another county, the Clerk of the Court shall assign the case in a manner directed by and subject to the approval of the Supervising Judge of the Family Law Division. The assignment to a judge shall be deemed to be for all purposes.

(Subd (c) relettered effective January 1, 2013; adopted as subd (d) effective January 1, 2012.)

(Rule 15.1 amended effective January 1, 2013; previously adopted as Rule 7.52 effective July 1, 2008; adopted effective July 1, 2009; amended effective January 1, 2012.)

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15.2 FORMS TO BE FILED AT COMMENCEMENT OF PROCEEDING

a. FORMS FOR GENERAL GUARDIANSHIP OF THE PERSON ONLY

In addition to any required Judicial Council forms, a petitioner seeking the appointment of a guardian of the person only must file the following local forms with the clerk of the court:

- (1) *Declaration Regarding Venue*, or a declaration contained within the petition that is in substantial compliance with rule 15.2(c);
- (2) *Court Investigator’s Information and Referral Form*; and,
- (3) *Order Appointing Investigator*.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009.)

b. FORMS AND DECLARATIONS FOR GENERAL GUARDIANSHIP OF THE PERSON AND THE ESTATE OR OF THE ESTATE ONLY

In addition to any required Judicial Council forms, a petitioner seeking the appointment of a guardian of the person and the estate, or of the estate only, must file the following local forms and declarations with the clerk of the court:

- (1) *Declaration Regarding Venue*, or a declaration contained within the petition that is in substantial compliance with rule 15.2(c);
- (2) *Preliminary Inventory of Guardianship Estate*;
- (3) *Court Investigator’s Information and Referral Form*; and,
- (4) *Order Appointing Investigator*.

(Subd (b) amended effective January 1, 2013; adopted effective July 1, 2009.)

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c. DECLARATION REGARDING VENUE

(1) Proposed Wards who are Residents of California

In order to ensure compliance with Probate Code section 2200 et seq., in all petitions for guardianship of the person and/or the estate where the proposed ward is a resident of the State of California, the petitioner shall include a declaration indicating whether the proposed ward is a resident of Solano County at the time the petition is filed. If the proposed ward is not a resident of Solano County, the declaration shall state why it is in the proposed ward's best interests to have the guardianship proceeding heard in Solano County. The declaration may be filed on a local form designated for that purpose or in a declaration in substantial compliance with this rule, or may be included in the body of the petition for guardianship.

(Subd (1) amended effective January 1, 2013; adopted effective July 1, 2009.)

(2) Proposed Wards who are Not Residents of California – Guardianships of the Person

In order to ensure compliance with Probate Code section 2200 et seq., in all petitions for guardianship of the person where the proposed ward is not a resident of the State of California, the petitioner shall include a declaration indicating whether the proposed ward is temporarily living in Solano County at the time the petition is filed. If the proposed ward is not temporarily living in Solano County, the declaration shall state why it is in the proposed ward's best interests to have the guardianship proceeding heard in Solano County. The declaration may be filed on a local form designated for that purpose or in a declaration in substantial compliance with this rule, or may be included in the body of the petition for guardianship.

(Subd (2) amended effective January 1, 2013; adopted effective July 1, 2009.)

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(3) Proposed Wards who are Not Residents of California – Guardianships of the Estate

In order to ensure compliance with Probate Code section 2200 et seq., in all petitions for guardianship of the estate where the proposed ward is not a resident of the State of California, the petitioner shall include a declaration indicating whether the proposed ward is temporarily living in Solano County at the time the petition is filed or whether the proposed ward has property in Solano County. If the proposed ward is not temporarily living in Solano County and does not have property in Solano County, the declaration shall state why it is in the proposed ward’s best interests to have the guardianship proceeding heard in Solano County. The declaration may be filed on a local form designated for that purpose or in a declaration in substantial compliance with this rule, or may be included in the body of the petition for guardianship.

(Subd (3) amended effective January 1, 2013; adopted effective July 1, 2009.)

(Subd (c) relettered and amended effective January 1, 2013; adopted as subd (e) effective July 1, 2009; prior subd (c) repealed effective January 1, 2013.)

d. FORMS FOR TEMPORARY GUARDIANSHIP OF THE PERSON AND/OR THE ESTATE [Repealed]

(Subd (d) repealed effective January 1, 2013; adopted effective July 1, 2009.)

(Rule 15.2 amended effective January 1, 2013; previously adopted as Rule 7.53 effective July 1, 2008; adopted effective July 1, 2009.)

15.3 NOTICE

a. ADDRESSES FOR SOLANO COUNTY AGENCIES ENTITLED TO NOTICE

The addresses for the Solano County Superior Court Investigator, the Director of Social Services, and the Solano County Health and Social Services Department are listed in Appendix 15-A.

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(Subd (a) amended and relettered effective January 1, 2013; adopted as subd (b) effective July 1, 2009; previous subd (a) repealed effective January 1, 2013.)

b. DECLARATION OF DUE DILIGENCE

If a petitioner cannot serve or locate a person for whom notice is required, the petitioner shall file a local form designated for that purpose or a substantially equivalent declaration which complies with this rule. The declaration must specify the name of the person whose whereabouts are unknown, the last known address of the person, the approximate date when the person was last known to reside at that address, all efforts undertaken to identify and serve or locate the person, and any facts that explain why the person cannot be located. To the extent appropriate, the petitioner shall make the following efforts and state the results in the declaration:

- (1) Search the public records in any county where the person was last known or believed to reside, including real and personal property indexes in the recorder's and assessor's offices, the local telephone directory and directory assistance, the county's voter registration, the county's vital statistics office, and any non-confidential court files concerning or involving the person;
- (2) Search all appropriate Internet search engines;
- (3) Inquiry of the person's current or former employer(s);
- (4) Inquiry of the person's current or former landlord(s) and neighbors;
- (5) Inquiry of the person's last known residential address and any neighbors of that address;
- (6) Inquiry of any relatives, friends, or other individuals who might have knowledge of the person's whereabouts; and,
- (7) Inquiry of any appropriate county, state, and federal correctional systems in which the petitioner believes or has reason to believe the person is or may be incarcerated.

(Subd (b) amended and relettered effective January 1, 2013; adopted as subd (f) adopted effective July 1, 2009.)

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c. DOCUMENTS TO BE SERVED [Repealed]

(Subd (c) repealed effective January 1, 2013; adopted effective July 1, 2009.)

d. PROOF OF PERSONAL SERVICE [Repealed]

(Subd (d) repealed effective January 1, 2013; adopted effective July 1, 2009.)

e. PROOF OF SERVICE BY MAIL [Repealed]

(Subd (e) repealed effective January 1, 2013; adopted effective July 1, 2009.)

f. DECLARATION OF DUE DILIGENCE [Relettered]

(Subd (f) relettered as subdivision (b) effective January 1, 2013; adopted effective July 1, 2009.)

g. ORDER DISPENSING WITH NOTICE [Repealed]

(Subd (g) repealed effective January 1, 2013; adopted effective July 1, 2009.)

h. NOTICE IN TEMPORARY GUARDIANSHIPS [Repealed]

(Subd (h) repealed effective January 1, 2013; adopted effective July 1, 2008.)

(Rule 15.3 amended effective January 1, 2013; previously adopted as Rule 7.52 effective July 1, 1989; adopted effective July 1, 2009.)

15.4 APPOINTMENT OF INVESTIGATOR

a. APPOINTMENT OF INVESTIGATOR IN RELATIVE GUARDIANSHIPS

The court shall appoint the Court Investigators Office to perform an investigation pursuant to Probate Code section 1513 where the proposed guardian is a relative of the ward within the second degree. For purposes of this rule, a person shall be considered a relative within the second degree if they are related to the ward as described in Probate Code section 1513, subdivision (g).

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(Subd (a) adopted effective July 1, 2009.)

b. APPOINTMENT OF INVESTIGATOR IN NON-RELATIVE GUARDIANSHIPS

In all probate guardianship matters where the proposed guardian is not a relative of the ward within the second degree as defined by Probate Code section 1513, subdivision (g), the court shall appoint the Solano County Department of Health & Social Services to perform an investigation pursuant to Probate Code sections 1513 and 1543.

(Subd (b) adopted effective July 1, 2009.)

c. SERVICE OF DOCUMENTS ON INVESTIGATOR – RELATIVE GUARDIANSHIPS

In guardianship proceedings where the court has appointed the Court Investigators Office, the petitioner or the petitioner's attorney must serve the Court Investigators Office with a copy of the following documents at least thirty (30) days prior to the hearing date:

- (1) *Notice of Hearing – Guardianship or Conservatorship* (Judicial Council form GC-020);
- (2) A copy of the *Petition for Guardianship* (Judicial Council form GC-210 or GC-210(P)); and
- (3) A completed *Court Investigator's Information and Referral Form* (Solano County Local Form no. 3490)

The documents shall be delivered or mailed to the address listed in Appendix 15-A.

(Subd (c) amended effective January 1, 2013; adopted effective July 1, 2009.)

d. SERVICE OF DOCUMENTS ON INVESTIGATOR – NON-RELATIVE GUARDIANSHIPS

In guardianship proceedings where the court has appointed the Solano County Department of Health & Social Services (“Department”) to investigate the guardianship petition, the petitioner or the petitioner's attorney must serve the

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Department with a copy of the following documents thirty (30) days prior to the hearing date:

- (1) *Notice of Hearing – Guardianship or Conservatorship* (Judicial Council form GC-020);
- (2) A copy of the *Petition for Guardianship* (Judicial Council form GC-210 or GC-210(P)); and,
- (3) Any other forms that may be required by the Department.

The documents shall be delivered or mailed to the address listed in Appendix 15-A.

(Subd (d) amended effective January 1, 2013; adopted July 1, 2009.)

e. DUTY TO UPDATE INFORMATION GIVEN TO INVESTIGATOR

The petitioner must advise the investigating office of any changes to the contact information of the ward, guardian, or proposed guardian.

(Subd (e) adopted effective July 1, 2009.)

f. DUTY TO COOPERATE WITH INVESTIGATOR

All parties, including, but not limited to, the petitioner, the proposed or appointed guardian, the parent(s) of the ward, and any attorneys for the parties, including appointed counsel for the ward or proposed ward, are to cooperate fully with the appointed investigator. Failure to cooperate may be punishable with sanctions pursuant to Code of Civil Procedure, section 575.2, in the court's discretion.

(Subd (f) amended effective January 1, 2013; adopted effective July 1, 2009.)

g. SERVICE OF SUBPOENA ON COURT INVESTIGATOR

Any subpoena to compel a court investigator's presence at a hearing or trial must be served in compliance with Government Code sections 68097.1 and 68097.2. Said subpoena shall be served personally on the court investigator, on the Court Executive Officer, or an agent designated by the Court Executive Officer, during

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the court's normal business hours. The subpoena shall be accompanied by payment in the amount required by Government Code section 68097.2 for each day that the court investigator is required to remain in attendance at the hearing or trial pursuant to the subpoena; otherwise, the subpoena shall not be accepted or service deemed complete.

In order to give the court investigator reasonable time for preparation, the subpoenaing party shall serve the subpoena a minimum of 10 court days prior to the first date the court investigator is to appear at the hearing or trial, unless the court investigator agrees to a shorter period of time.

(Subd (g) amended effective July 1, 2013; adopted effective January 1, 2012; amended effective January 1, 2013.)

(Rule 15.4 amended effective July 1, 2013; adopted as Rule 7.55 effective July 1, 2008; adopted as Rule 15.4 effective July 1, 2009; amended effective January 1, 2012, and January 1, 2013.)

15.5 COURT INVESTIGATOR FEES

a. COURT INVESTIGATOR FEES GENERALLY

A fee for the services of the Court Investigators Office shall be imposed upon the person(s) so responsible for payment per Probate Code section 1513.1. The rate of this fee depends on the nature of the investigation and is determined by the court on an annual basis. All rates are subject to change. The amount of the fee payable shall be determined by the fee schedule in effect on the date the petition triggering the investigation is filed, the date the accounting being reviewed is filed, or the due date of any reviews mandated by law. A list of current fees is available from the Court Investigators Office or the Family Law Clerk's Office.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009; amended effective January 1, 2010.)

b. PAYMENT OF COURT INVESTIGATOR FEES

Any and all assessments not waived by the court or county shall be paid to the court.

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If an investigation is required because a petition has been filed, the investigation shall not be undertaken unless and until the applicable investigation fee is paid, unless otherwise ordered by the court. This includes, but is not limited to, investigations necessitated by a petition for appointment of a temporary guardian, appointment of a guardian, removal of a guardian, or termination of a guardianship.

For other court investigator services not triggered by the filing of a petition but still required by law or court order, the assessed fee is payable within 30 days after the *Assessment and Order for Payment* is mailed by the court. This includes, but is not limited to, investigations necessitated by the mandatory periodic reviews in guardianships.

(Subd (b) amended effective January 1, 2013; adopted effective July 1, 2009.)

c. DEFERMENT OR WAIVER OF COURT INVESTIGATOR FEES

Upon application by a guardian, a parent, or a ward, the court may defer or waive a portion or all of the assessed court investigator fees if the court finds that ordering payment of the assessed fees would constitute a hardship for the ward or the ward's estate pursuant to Probate Code section 1513.1. The court may also defer fees pursuant to Probate Code section 2628. There shall be a rebuttable presumption that the assessed court investigator fees constitute a hardship on a ward or proposed ward if the proposed guardian qualifies for a fee waiver under Government Code section 68630 et seq.

The court may periodically review the person's ability to pay the assessed fee. If the court becomes aware of a change in circumstances permitting payment of the fees by the person, the court shall order the fees paid after notice to the person and an opportunity to be heard.

(Subd (c) amended effective January 1, 2013; adopted effective July 1, 2009.)

(Rule 15.5 amended effective January 1, 2013; previously adopted as Rule 7.54 effective July 1, 1989; previously renumbered as Rule 7.56 effective July 1, 2008; previously readopted as Rule 15.5 effective July 1, 2009; amended effective January 1, 2010.)

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15.6 TEMPORARY GUARDIANSHIPS

a. SETTING HEARING ON TEMPORARY GUARDIANSHIPS

Unless otherwise ordered by the court, hearings on temporary guardianships shall normally be set within 21 days from the date the petition for a temporary guardianship is filed.

(Subd (a) adopted effective January 1, 2016; previous subd (a) adopted effective July 1, 2009; previous subd (a) repealed effective January 1, 2013; amended effective January 1, 2013.)

b. EX PARTE APPLICATIONS FOR ORDERS WAIVING OR SHORTENING NOTICE, OR MODIFYING THE METHOD OF NOTICE

In addition to the Judicial Council and local forms required for temporary guardianships, a petitioner seeking an ex parte order waiving or shortening notice or modifying the method of notice of the hearing on the temporary guardianship shall file an *Ex Parte Application to Waive or Shorten Notice of Hearing on Temporary Guardianship or Conservatorship* (Solano County Local Form no. 3710).

(Subd (b) amended effective January 1, 2016; adopted effective January 1, 2013; previous subd (b) repealed effective January 1, 2013.)

(Rule 15.6 amended effective January 1, 2016; adopted as Rule 7.57 effective July 1, 2008; adopted effective July 1, 2009; amended effective January 1, 2013.)

15.7 EX PARTE APPLICATIONS FOR TEMPORARY GUARDIANSHIP OR OTHER TEMPORARY ORDERS [Repealed]

(Rule 15.7 repealed effective January 1, 2013; adopted as Rule 7.55 effective July 1988; renumbered as Rule 7.58 effective July 1, 2008; adopted as Rule 15.7 effective July 1, 2009.)

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15.8 CONTESTED GUARDIANSHIPS

a. OBJECTIONS TO THE APPOINTMENT OF GUARDIAN

A person objecting to the appointment of a temporary or general guardian of the person and/or estate are strongly encouraged to file and serve their objection on a local form designated for that purpose as far in advance as possible of the appropriate guardianship hearing date. If filing and service of the objection is not possible prior to the hearing date, the objecting party shall appear at the hearing either personally or through counsel to state their objection(s) on the record; however, unless otherwise ordered by the court, appearance at the hearing does not excuse the objecting party from filing his or her written objection and complying with the service requirements in this rule.

(Subd (a) relettered and amended effective January 1, 2013; adopted as subd (b) effective July 1, 2009; previous subd (a) repealed effective January 1, 2013.)

b. OBJECTOR’S NOMINATION OF ALTERNATE GUARDIAN

A person’s nomination of an alternate guardian for a proposed ward shall not be considered unless and until a petition naming the alternate proposed guardian is filed and the alternate proposed guardian indicates in writing that he or she consents to the nomination. A petition filed under this rule shall be filed in the same case number as the original petition. A petition filed pursuant to this rule is subject to the same service and notice requirements as the original petition for guardianship.

(Subd (b) amended and relettered effective January 1, 2013; adopted as subd (c) effective July 1, 2009.)

(Rule 15.8 amended effective January 1, 2013; adopted as Rule 7.56 effective July 1, 1988; renumbered as Rule 7.59 effective July 1, 2008; adopted as Rule 15.8 effective July 1, 2009.)

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15.9 ORDERS FOR VISITATION IN GUARDIANSHIPS

a. REQUEST FOR VISITATION ORDERS

A person seeking orders granting that person visitation with a ward shall file a petition seeking visitation orders. The petition may be filed in pleading format or may be filed on a *Request for Order* form (Judicial Council form FL-300). No filing fee shall be charged for the *Request for Order* if it is filed in a guardianship of the person only. (Gov. C. 70657(e).) Unless otherwise ordered by the court upon proper application, the person shall provide notice of his or her petition as required by Probate Code section 1511.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009.)

b. DOCUMENTS TO BE SERVED

A person requesting visitation orders must have the following documents served on any person who is entitled to notice of the petition for guardianship per Probate Code section 1511 or by order of the court:

- (1) A copy of the filed petition or *Request for Order* for visitation with any and all attachments; and,
- (2) *Notice of Hearing – Guardianship or Conservatorship* (Judicial Council form GC-020).

(Subd (b) amended effective January 1, 2013; adopted effective July 1, 2009.)

c. PROOFS OF SERVICE; DECLARATIONS OF DUE DILIGENCE

A person requesting visitation shall file one or more proofs of service demonstrating that all persons entitled to notice have been served as required. A person who cannot locate or provide notice to a particular individual shall file a declaration with the court explaining the person's efforts to locate the individual.

(Subd (c) amended effective January 1, 2013; adopted effective July 1, 2009.)

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d. MEDIATION

If a dispute exists as to the request for visitation, the matter shall be referred to mediation with Family Court Services. Mediations ordered as a result of this local rule shall be subject to all provisions found in Chapter 11 (commencing with Family Code section 3160) of Part 3 of Division 8 of the Family Code, all applicable provisions in the California Rules of Court, and Solano County Local Rules, rule 5.20.

(Subd (d) amended effective January 1, 2013; adopted effective July 1, 2009.)

e. ORDERS FOR VISITATION

Stipulations between the parties for visitation between a ward and another individual shall be prepared as a pleading or on a form designated by the court for use in guardianship matters. All other court orders concerning visitation with a ward shall be prepared and filed as a pleading or on a form designated by the court for use in guardianship matters.

(Subd (e) adopted effective July 1, 2009.)

(Rule 15.9 amended effective January 1, 2013; adopted as Rule 7.60 effective July 1, 2008; adopted as Rule 15.9 effective July 1, 2009.)

15.10 GUARDIANSHIPS OF THE ESTATE

a. INVENTORIES AND APPRAISALS

In order to ensure compliance with the guardian's obligation to file an inventory and appraisal, the court will ordinarily set a review hearing to take place four (4) months after the date of appointment of a guardian of the estate or a guardian of the person and estate. The date of the initial compliance review hearing shall be listed as part of the order appointing the guardian. For good cause shown, the court may dispense with setting this review hearing.

The guardian shall file the inventory and appraisal required by Probate Code section 2610 at least thirty (30) days prior to the date of the review hearing concerning that inventory and appraisal. The guardian shall serve an exact copy of the inventory

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and appraisal on the Court Investigators Office, if the inventory is in a relative guardianship of the estate, or on the Solano County Department of Health & Social Services, if the inventory is in a non-relative guardianship of the estate.

A person who files an objection to the inventory and appraisal of a guardian shall timely serve a notice of hearing on the Court Investigators Office, if the inventory and appraisal is in a relative guardianship of the estate, or on the Solano County Department of Health & Social Services, if the inventory and appraisal is in a non-relative guardianship of the estate. This notice of hearing shall only be required for a hearing set by the objecting party that is not already on calendar. No notice of the hearing is required for the review hearings set automatically by the court.

(Subd (a) amended effective January 1, 2013; adopted effective July 1, 2009.)

b. ACCOUNTINGS

In order to ensure compliance with the guardian’s obligation to file an accounting, the court will ordinarily set a review hearing to take place fifteen (15) months after the date of appointment of a guardian of the estate or a guardian of the person and estate. The date of the compliance review hearing shall be listed as part of the order appointing the guardian. For good cause shown, the court may dispense with setting this review hearing in individual cases. The court may set additional review hearings as needed for the initial and any subsequent accounts.

The guardian shall file the accounting at least thirty (30) days prior to the date of the review hearing concerning that accounting. The guardian shall serve an exact copy of the accounting on the Court Investigators Office, if the accounting is in a relative guardianship of the estate, or on the Solano County Department of Health & Social Services, if the accounting is in a non-relative guardianship of the estate.

Absent a court order to the contrary, any subsequent accountings shall likewise be filed and served at least 30 days prior to any subsequent compliance review hearings.

(Subd (b) adopted effective January 1, 2013; previous subd (b) repealed effective January 1, 2013.)

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c. INVESTMENTS

If a request for special notice has not been filed, a petition seeking court authorization to invest may be heard without notice. The emergency order procedure set out in Local Rule 5.4 shall apply.

(Subd (c) amended effective January 1, 2013; adopted effective July 1, 2009.)

(Rule 15.10 amended effective January 1, 2013; adopted as Rule 7.59 effective July 1, 1992; renumbered as Rule 7.61 effective July 1, 2008; adopted as Rule 15.10 effective July 1, 2009.)

15.11 GUARDIANSHIPS OF THE PERSON

a. ANNUAL STATUS REPORT

The court may order on a case-by-case basis that a guardian of the person or a guardian of the person and estate shall comply with the annual status report requirement per Probate Code section 1513.2.

(Subd (a) relettered effective January 1, 2013.)

(Rule 15.11 renumbered effective January 1, 2013; adopted as Rule 15.17 effective January 1, 2010; previous Rule 15.11 repealed effective January 1, 2013.)

15.12 ALLOWANCE OF FEES IN GUARDIANSHIP PROCEEDINGS [Repealed]

(Rule 15.12 repealed effective January 1, 2013; adopted as Rule 7.63 effective July 1, 1989; adopted as Rule 15.12 effective July 1, 2009.)

15.13 INVESTMENTS BY GUARDIAN OF THE ESTATE [Repealed]

(Rule 15.13 repealed effective January 1, 2013; adopted as Rule 7.64 effective July 1, 1988; adopted as Rule 15.13 effective July 1, 2009.)

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15.14 APPOINTMENT OF COUNSEL FOR WARD

a. ELIGIBILITY FOR INITIAL APPOINTMENT

An attorney wishing to be considered for appointment on any guardianship case on or after January 1, 2008, must comply with California Rules of Court, rule 7.1101, and submit a request to the court to be placed on the panel of appointed attorneys in guardianship cases. The request must be accompanied by a *Certification of Attorney Concerning Qualifications For Court Appointment in Conservatorships or Guardianships* (Judicial Council form GC-010). An attorney whose request is approved by the court is thereafter eligible for appointment in guardianship cases.

(Subd (a) adopted effective July 1, 2009.)

b. RENEWAL OF ELIGIBILITY FOR APPOINTMENT

An attorney who is eligible for appointment in guardianship cases pursuant to rule 15.14, subdivision (a), shall certify to the court by March 31 of each year following the attorney's initial approval that he or she has completed the education requirements set forth in California Rules of Court, rule 7.1101. The certification shall be on the *Annual Certification of Court-Appointed Attorney* form (Judicial Council form GC-011). Failure to timely comply with the certification requirements or with the education requirements in rule 7.1101 shall result in the removal of the attorney from the approved panel of appointed attorneys; however, the court may reinstate the attorney upon the prompt filing of an affidavit to the court demonstrating good cause why the certification was not timely submitted to the court.

(Subd (b) adopted effective July 1, 2009.)

c. STANDARDS GOVERNING COUNSEL FOR WARD

Counsel appointed to represent a ward in a guardianship proceeding shall be subject to, and shall have all applicable rights and responsibilities found in, California Rules of Court, rule 5.242.

(Subd (c) adopted effective July 1, 2009.)

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d. **COMPENSATION OF COUNSEL FOR WARD**

Compensation of counsel appointed to represent a ward shall be governed by Probate Code section 1470. All orders appointing minor’s counsel in guardianship proceedings, including orders setting compensation, shall be on an *Order Appointing Minor’s Counsel* form (Solano County Local Form no. 3750).

(Subd (d) adopted effective July 1, 2009.)

(Rule 15.14 adopted effective July 1, 2009; adopted as Rule 7.65 effective July 1, 2008.)

15.15 TERMINATION OF GUARDIANSHIP

a. **FORMS TO BE FILED FOR TERMINATION OF GUARDIANSHIP**

A party wishing to terminate a guardianship for a ward who is not deceased or emancipated must file the following forms:

(1) *Notice of Hearing – Guardianship or Conservatorship* (Judicial Council form GC-020);

(2) *Petition for Termination of Guardianship* (Judicial Council form GC-255);
and,

(3) Order Terminating Guardianship (Judicial Council form GC-260).

(Subd (a) adopted effective July 1, 2009.)

b. **NOTICE OF THE PETITION TO TERMINATE**

In addition to complying with the service and notice requirements set by law, a person filing a petition to terminate the guardianship shall also serve a copy of the petition and the *Notice of Hearing* on the Court Investigators Office, if the guardianship to be terminated is a relative guardianship, or on the Solano County Department of Health & Social Services, if the guardianship to be terminated is a non-relative guardianship.

(Subd (b) amended effective January 1, 2013; adopted effective July 1, 2009.)

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c. LODGING OF ORDER TERMINATING GUARDIANSHIP

In the event the court makes custody orders as part of an order terminating a guardianship pursuant to Probate Code section 1601, a copy of the custody order shall be filed in any pending or subsequently commenced proceeding concerning custody of the child. The custody order shall be prepared as a pleading or on a form designated by the court for use pursuant to this rule.

(Subd (c) adopted effective July 1, 2009.)

(Rule 15.15 amended effective January 1, 2013; adopted as Rule 7.81 effective July 1, 1988; renumbered as Rule 7.66 effective July 1, 2008; adopted as Rule 15.15 effective July 1, 2009.)

15.16 SANCTIONS

Failure to comply with these local rules in guardianship matters may result in the imposition of sanctions pursuant to Code of Civil Procedure section 575.2.

(Rule 15.16 adopted effective July 1, 2009.)

15.17 GUARDIANSHIPS OF THE PERSON – STATUS REPORT [Repealed]

(Rule 15.17 repealed effective January 1, 2013; adopted effective January 1, 2010.)

15.18 – 15.49 [RESERVED]

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15.50 CONSERVATORSHIP MATTERS TO WHICH RULE 15 APPLIES

Unless otherwise stated in an individual rule, Part Two of Rule 15 shall apply to all conservatorship matters brought pursuant to the Probate Code. It does not apply to LPS conservatorships brought pursuant to Welfare & Institutions Code section 5000 et seq.

(Rule 15.50 adopted effective July 1, 2009.)

15.51 CONTINUANCE OF HEARING WHERE CONSERVATEE NOT SERVED WITH CITATION

If the proposed conservatee has not been served with the citation as required by Probate Code section 1824, the petitioner shall notify the court and all persons entitled to notice at least 15 days prior to the hearing and request a new hearing date. The original citation shall be filed showing no service and an amended citation shall be issued with the new hearing date. The petitioner shall also serve a notice to all interested persons of the new hearing date.

(Rule 15.51 adopted effective July 1, 2009; previously adopted as portion of Rule 7.69 effective July 1, 1988.)

15.52 ADDITIONAL REQUIREMENTS FOR PROPOSED CONSERVATORS PRIOR TO ISSUANCE OF LETTERS

- a. Pursuant to Probate Code section 1834, subsection (b), Solano County requires that a conservator provide the court with the conservator's Social Security number and driver's license numbers. A conservator shall be deemed to have complied with this requirement by submitting a fully completed and signed *Confidential Conservator Screening Form* (Judicial Council form GC-314) to the Court Investigators Office as part of the initial conservatorship investigation process. This requirement shall not apply to the Public Guardian.

(Subd. (a) relettered and amended effective July 1, 2011.)

- b. All proposed conservators shall view the video *With Heart: Understanding Conservatorships*, prior to the initial hearing on the petition, and shall file an

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affidavit under penalty of perjury stating they have complied with this requirement. This requirement shall not apply to the Public Guardian.

(Subd. (b) adopted effective July 1, 2011.)

(Rule 15.52 amended effective July 1, 2011; previously adopted as portion of Rule 7.69 effective July 1, 1988; adopted effective July 1, 2009.)

15.53 COURT INVESTIGATOR

a. **AUTOMATIC APPOINTMENT OF COURT INVESTIGATOR**

The court automatically appoints the court investigator to conduct investigations into probate conservatorships and proposed probate conservatorships.

(Subd (a) adopted effective July 1, 2009.)

b. **SERVICE OF DOCUMENTS ON COURT INVESTIGATOR UPON COMMENCEMENT OF THE PROCEEDING**

Immediately upon the filing of a *Petition for Appointment of Temporary Conservator* or *Petition for Appointment of Probate Conservator*, the petitioner or the petitioner's attorney must submit the following documents to the Court Investigators Office:

- (1) *Notice of Hearing – Guardianship or Conservatorship* (Judicial Council form GC-020);
- (2) A copy of the *Petition for Appointment of Probate Conservator* (Judicial Council form GC-311);
- (3) A copy of the *Petition for Appointment of Temporary Conservator* (Judicial Council form GC-111), if one was filed; and,
- (4) The *Confidential Conservator Screening Form* (Judicial Council form GC-314).

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The documents shall be delivered or mailed to:
Court Investigators Office
Superior Court of California, County of Solano
600 Union Avenue
Fairfield, California 94533

(Subd (b) adopted effective July 1, 2009.)

**c. SERVICE OF PETITIONS AND OTHER DOCUMENTS ON COURT INVESTIGATOR
AFTER APPOINTMENT OF CONSERVATOR**

A copy of any pleadings or documents filed in the court file shall be immediately provided to the Court Investigators Office by the party or attorney filing said pleadings or documents.

(Subd (c) adopted effective July 1, 2009.)

d. DUTY TO UPDATE INFORMATION GIVEN TO INVESTIGATOR

The petitioner must advise the investigating office of any changes to the contact information of the conservatee or proposed conservatee.

(Subd (d) adopted effective July 1, 2009.)

e. DUTY TO COOPERATE WITH INVESTIGATOR

All parties, including but not limited to the petitioner, proposed or appointed conservator, conservatee or proposed conservatee, and any attorneys for the parties, including appointed counsel for the conservatee or proposed conservatee, are to cooperate fully with the appointed investigator. Failure to cooperate may be punishable with sanctions pursuant to Code of Civil Procedure section 575.2, in the court's discretion.

(Subd (e) adopted effective July 1, 2009.)

f. SERVICE OF SUBPOENA ON COURT INVESTIGATOR

Any subpoena to compel a court investigator's presence at a hearing or trial must be served in compliance with Government Code sections 68097.1 and 68097.2.

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Said subpoena shall be served personally on the court investigator, on the Court Executive Officer, or an agent designated by the Court Executive Officer, during the court’s normal business hours. The subpoena shall be accompanied by payment in the amount required by Government Code section 68097.2 for each day that the court investigator is required to remain in attendance at the hearing or trial pursuant to the subpoena; otherwise, the subpoena shall not be accepted or service deemed complete.

In order to give the court investigator reasonable time for preparation, the subpoenaing party shall serve the subpoena a minimum of 10 court days prior to the first date the court investigator is to appear at the hearing or trial, unless the court investigator agrees to a shorter period of time.

(Subd (f) amended effective July 1, 2016; adopted effective January 1, 2012.)

(Rule 15.53 amended effective July 1, 2016; previously adopted as Rule 7.70 effective July 1, 1988; adopted as Rule 15.53 effective July 1, 2009; previously amended effective January 1, 2012.)

15.54 COURT INVESTIGATOR FEES

a. COURT INVESTIGATOR FEES GENERALLY

A fee for the services of the Court Investigators Office shall be imposed upon the person(s) so responsible for payment per Probate Code section 1851.5. The rate of this fee depends on the nature of the investigation and is determined by the court on an annual basis. All rates are subject to change. The amount of the fee payable shall be determined by the fee schedule in effect on the date the petition triggering the investigation is filed, the date the accounting being reviewed is filed, or the due date of any reviews mandated by law. A list of current fees is available from the Court Investigators Office or the Family Law Clerk’s Office. The assessed fee is payable within 30 days after the Assessment and Order for Payment is mailed by the Court Investigators Office.

(Subd (a) amended effective January 1, 2010; adopted effective July 1, 2009.)

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b. PAYMENT OF COURT INVESTIGATOR FEES

Any and all assessments not waived by the court shall be paid to the court.

(Subd (b) adopted effective July 1, 2009.)

c. DEFERRAL OR WAIVER OF COURT INVESTIGATOR FEES

Upon application by the conservator or proposed conservator or the conservatee or proposed conservatee, the court may defer or waive a portion or all of the assessed court investigator fees if the court finds that ordering payment of the assessed fees at the time of the assessment would constitute a hardship for the conservatee or conservatee's estate pursuant to Probate Code section 1851.5. The court may also defer fees pursuant to Probate Code section 2628. There shall be a rebuttable presumption that the assessed court investigator fees constitute a hardship on a conservatee or proposed conservatee if the conservatee qualifies for a fee waiver under Government Code section 68630 et seq. The court shall review the conservatee's ability to pay the assessed fee at every review of the conservatorship. If the court finds the conservatee is able to pay the fee at the time of a review, or if the court otherwise becomes aware of a change in circumstances permitting payment of the fees by the conservatee, the court shall order the fees paid.

(Subd (c) adopted effective July 1, 2009.)

(Rule 15.54 amended effective January 1, 2010; adopted effective July 1, 2009.)

15.55 APPOINTMENT OF COUNSEL FOR CONSERVATEE

a. ELIGIBILITY FOR INITIAL APPOINTMENT

An attorney wishing to be considered for appointment on any conservatorship case on or after January 1, 2008, must comply with California Rules of Court, rule 7.1101, and submit a request to the court to be placed on the panel of appointed attorneys in conservatorship cases. The request must be accompanied by a *Certification of Attorney Concerning Qualifications For Court Appointment in Conservatorships or Guardianships* (Judicial Council form GC-010). An attorney whose application is approved by the court is thereafter eligible for appointment in conservatorship cases.

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(Subd (a) adopted effective July 1, 2009.)

b. RENEWAL OF ELIGIBILITY FOR APPOINTMENT

An attorney who is eligible for appointment in conservatorship cases pursuant to rule 15.55, subdivision (a), shall certify to the court by March 31 of each year following the attorney’s initial approval that he or she has completed the education requirements set forth in California Rules of Court, rule 7.1101. The certification shall be on the *Annual Certification of Court-Appointed Attorney* form (Judicial Council form GC-011). Failure to timely comply with the certification requirements or with the education requirements in rule 7.1101 shall result in the removal of the attorney from the approved panel of appointed attorneys; however, the court may reinstate the attorney upon the prompt filing of an affidavit to the court demonstrating good cause why the certification was not timely submitted to the court.

(Subd (b) adopted effective July 1, 2009.)

c. COMPENSATION OF COUNSEL

Compensation of counsel appointed to represent a conservatee shall be governed by Probate Code section 1470.

(Subd (c) adopted effective July 1, 2009.)

(Rule 15.55 adopted effective July 1, 2009.)

15.56 TEMPORARY CONSERVATORSHIPS; EX PARTE PETITIONS FOR TEMPORARY CONSERVATORSHIP AND OTHER ORDERS; WAIVER OF NOTICE REQUIREMENTS

a. EX PARTE APPLICATIONS GENERALLY

Ex parte applications are extraordinary remedies. Except as set forth in an individual rule, ex parte applications for a temporary conservatorship of either the estate or the person, or for temporary orders pertaining to an existing conservatorship, are appropriate only where the applicant makes a showing per California Rules of Court, rule 7.1062 that an exception to the notice requirements

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is necessary to protect the conservatee or the proposed conservatee or his or her estate from immediate and substantial harm.

(Subd (a) adopted effective July 1, 2009.)

b. EX PARTE PETITION FOR APPOINTMENT OF A TEMPORARY CONSERVATOR

Unless the petitioner makes a showing of immediate and substantial harm or other good cause for an ex parte granting of a temporary conservatorship per California Rules of Court, rule 7.1062, the court ordinarily will not entertain an ex parte application for appointment of a temporary conservator, even where all those entitled to notice have joined in the petition. In cases where the court determines that immediate appointment of a temporary conservator is necessary, said appointment shall be governed by the provisions of Probate Code section 2250.

(Subd (b) adopted effective July 1, 2009.)

c. EX PARTE NOTICE REQUIREMENTS

(1) Before submitting an ex parte application for the court's consideration, the applicant shall comply with the procedures in Probate Code section 1051, California Rules of Court, rule 7.55, and all applicable local rules. Unless otherwise stated in the Solano County Local Rules, the applicant must comply with all requirements for a declaration setting forth that notice of the ex parte request has been given to all required persons or the reason notice has not been given. At the time of submission of the application, a completed *Declaration Re Notice Upon Ex Parte Application for Orders – Conservatorships* (Solano County Local Form no. 1070-C) or a declaration in substantial compliance therewith, shall accompany all applications for ex parte orders and shall be filed before the ex parte hearing. The moving party shall make available a copy of the filed *Declaration Re Notice Upon Ex Parte Application for Orders* to the judicial officer, and to the opposing party or attorney if one appears, at the time of the ex parte hearing, or the ex parte hearing may be ordered rescheduled.

(Subd (1) adopted effective July 1, 2009.)

(2) Unless otherwise ordered by the court, notice of the ex parte application for temporary orders shall be given by the petitioner to all those who are entitled

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to notice per Probate Code section 2250, subsection (e). The notice shall include the date, time, and place the request will be made, a summary of the relief requested, and the facts upon which the request will be made. In its discretion, the court may require that the entire moving papers package be served in a prescribed manner upon another party, interested person, or his or her attorney, at a specified time before the ex parte hearing. Notice may be excused pursuant to these rules.

(Subd (2) adopted effective July 1, 2009.)

(Subd (c) adopted effective July 1, 2009.)

d. DECLARATION OF DUE DILIGENCE

If a petitioner cannot locate a relative or other person for whom notice is required, the petitioner shall file a *Declaration of Due Diligence* (Solano County Local Form no. 3705) or a substantially equivalent declaration which complies with this rule. The declaration must specify the name of the relative or other person whose whereabouts are unknown, the last known address of the person, the approximate date when the person was last known to reside at that address, all efforts undertaken to identify and locate the person, and any facts that explain why the person cannot be located. At a minimum, the petitioner shall make all of the following efforts and state the results in the declaration:

- (1) Search the public records in any county where the person was last known or believed to reside, including real and personal property indexes in the recorder's and assessor's offices, the local telephone directory and directory assistance, the county's voter registration, the county's vital statistics office, and any non-confidential court files concerning or involving the person;
- (2) Search all appropriate Internet search engines;
- (3) Inquiry of the person's current or former employer(s);
- (4) Inquiry of the person's current or former landlord(s) and neighbors;
- (5) Inquiry of the person's last known residential address and any neighbors of that address;

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- (6) Inquiry of any relatives, friends, or other individuals who might have knowledge of the person’s whereabouts; and,
- (7) Inquiry of any appropriate county, state, and federal correctional systems in which the petitioner believes or has reason to believe the person is or may be incarcerated.

(Subd (d) adopted effective July 1, 2009.)

e. ORDER DISPENSING WITH NOTICE

A petitioner seeking an order dispensing with notice for one or more persons shall submit an *Order Dispensing with Notice* (Judicial Council form GC-021) to the court prior to or at the hearing on the petition for conservatorship. The court will not grant an order dispensing with notice unless the petitioner has filed a *Declaration of Due Diligence* pursuant to Solano County Local Rules, rule 15.56, subdivision (d).

(Subd (e) adopted effective July 1, 2009.)

(Rule 15.56 adopted effective July 1, 2009; previously adopted as Rule 7.71 effective July 1, 1988.)

15.57 INDEPENDENT EXERCISE OF POWERS

No powers specified in Probate Code Section 2591 will be granted in the absence of a clear and convincing factual showing that the grant of each power requested is needed to administer the estate, and that the grant of such power is for the advantage, benefit and best interest of the estate.

(Rule 15.57 adopted effective July 1, 2009; previously adopted as Rule 7.73 effective July 1, 1988.)

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15.58 CONSERVATORSHIP INVENTORIES AND APPRAISALS

a. INVENTORIES AND APPRAISALS GENERALLY

Inventories and appraisals in conservatorships of the estate are governed by Chapter 7 of Part 4 of Division 4 of the Probate Code (commencing with section 2600). The use of mandatory Judicial Council forms is required, and the use of optional Judicial Council forms is strongly encouraged, in the preparation of all inventories and appraisals.

(Subd (a) adopted effective July 1, 2009.)

b. REVIEW HEARING FOR INVENTORIES AND APPRAISALS

At the time of the appointment of a conservator of the estate or a conservator of the person and the estate, the court shall set a review hearing to take place four (4) months after the date of appointment. The date of the initial compliance review hearing shall be listed as part of the order appointing the conservator. The court may set additional review hearings as needed for the initial and any subsequent inventories and appraisals.

(Subd (b) adopted effective July 1, 2009.)

c. FILING OF INVENTORIES AND APPRAISALS

The conservator shall file the inventory and appraisal required by Probate Code section 2610 at least thirty (30) days prior to the date of the review hearing set pursuant to Rule 15.58, subsection (b).

(Subd (c) adopted effective July 1, 2009.)

d. SERVICE OF INVENTORIES AND APPRAISALS

At the time that the conservator of the estate presents an inventory and appraisal to the court pursuant to Probate Code sections 2610 or 2620 or any other section of the Probate Code, the conservator shall also serve an exact copy of the inventory and appraisal on the Court Investigators Office.

(Subd (d) adopted effective July 1, 2009.)

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e. SERVICE OF NOTICE OF HEARING ON OBJECTIONS TO INVENTORIES AND APPRAISALS

A person who files an objection to the inventory or appraisal of a conservator shall timely serve a notice of hearing on the Court Investigators Office. This notice of hearing shall only be required for a hearing set by the objecting party that is not already on calendar. No notice of the hearing is required for the review hearings set automatically by the court.

(Subd (e) adopted effective July 1, 2009.)

(Rule 15.58 adopted effective July 1, 2009; previously adopted as Rule 7.75 effective July 1, 1988.)

15.59 CONSERVATORSHIP ACCOUNTINGS

a. ACCOUNTINGS GENERALLY

Accountings in conservatorships of the estate are governed by Chapter 7 of Part 4 of Division 4 of the Probate Code (commencing with section 2600). The use of mandatory Judicial Council forms is required, and the use of optional Judicial Council forms is strongly encouraged, in the preparation of all accountings.

(Subd (a) adopted effective July 1, 2009.)

b. SUPPLEMENTAL REPORT TO ACCOMPANY ACCOUNTING

In addition to the information required by Probate Code section 2620, each accounting shall include a report containing the following information:

- (1) An explanation of any unusual items appearing in the account;
- (2) A report of the stewardship of the fiduciary in the management of the assets of the conservatee's estate during the period covered by the account;
- (3) In cases where a bond has been ordered, a statement attesting that bond premiums have been paid regularly; and,

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- (4) If income-producing property is inventoried in the conservatorship and the account fails to indicate that income is being produced by the property, an explanation as to the lack of income.

(Subd (b) adopted effective July 1, 2009.)

c. REVIEW HEARING FOR ACCOUNTINGS

At the time of the appointment of a conservator of the estate or a conservator of the person and the estate, the court shall set a review hearing to take place fifteen (15) months after the date of appointment. The date of the compliance review hearing shall be listed as part of the order appointing the conservator. The court may set additional review hearings as needed concerning the initial or subsequent accountings.

(Subd (c) amended effective January 1, 2012; adopted effective July 1, 2009.)

d. FILING OF ACCOUNTINGS

The conservator shall file the accounting required by Probate Code section 2620 at least thirty (30) days prior to the date of the review hearing set pursuant to Rule 15.59, subsection (c), concerning that accounting.

(Subd (d) adopted effective July 1, 2009.)

e. SERVICE OF ACCOUNTINGS

At the time that the conservator of the estate presents an accounting to the court pursuant to Probate Code section 2620 et seq. or any other section of the Probate Code, the conservator shall also serve an exact copy of the inventory on the Court Investigators Office. Said service shall be at least thirty (30) days prior to the date of the review hearing set pursuant to Rule 15.59, subsection (c). Absent a court order to the contrary, any subsequent accountings shall likewise be filed and served on the Court Investigators Office at least 30 days prior to any subsequent compliance review hearings.

(Subd (e) adopted effective July 1, 2009.)

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f. SERVICE OF NOTICE OF HEARING ON OBJECTIONS TO ACCOUNTINGS

A person who files an objection to the accounting of a conservator shall timely serve a notice of hearing on the Court Investigators Office. This notice of hearing shall only be required for a hearing set by the objecting party that is not already on calendar. No notice of the hearing is required for the review hearings set automatically by the court.

(Subd (f) adopted effective July 1, 2009.)

(Rule 15.59 amended effective January 1, 2012; previously adopted as Rule 7.76 effective July 1, 1988; adopted as Rule 15.59 effective July 1, 2009.)

15.60 ALLOWANCE OF FEES

a. GUIDELINES FOR COMPENSATION

A conservator of the estate or the person and/or his or her attorney may petition the court for just and reasonable compensation in accordance with Probate Code sections 2640 and 2642. In determining whether to award compensation, the court shall take into consideration the following:

- (1) The nature and difficulty of the services rendered to the conservatee and/or the conservatee's estate;
- (2) The results achieved from those services;
- (3) The benefit to the conservatee and/or the conservatee's estate of those services;
- (4) The productivity of the conservator's and/or attorney's time spent in performing the services;
- (5) The expertise and experience of the person requesting the fees;
- (6) The hourly rate of the person performing the services; and,

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- (7) The total amount of compensation requested in relation to size and income of the conservatee’s estate, if applicable.

(Subd (a) adopted effective July 1, 2009.)

b. COMPENSATION OF CONSERVATOR OR CONSERVATOR’S ATTORNEY FROM TRUST OR OTHER SOURCE

If a conservatee is also the beneficiary of a trust and the compensation of a conservator of the person or estate, or his or her attorney, is sought from the trust or other source in part or in whole, the conservator shall first seek approval of the compensation in the conservatorship matter. The petition shall include a declaration by the trustee as to whether there are sufficient funds in the trust to allow for the compensation sought. If the conservatorship of the estate has sufficient funds to pay for the requested compensation, the conservator shall explain why compensation is sought from the trust and not the estate. A conservator or a conservator’s attorney shall not accept compensation for work done in a conservatorship matter without a court order approving said compensation by the judge assigned to hear the conservatorship matter.

(Subd (b) amended effective January 1, 2012; adopted effective July 1, 2009.)

(Rule 15.60 amended effective January 1, 2012; previously adopted as Rule 7.78 effective July 1, 1988; adopted effective July 1, 2009.)

15.61 ORDERS FOR SUPPORT AND SUBSTITUTED JUDGMENT PETITIONS

a. SUBSTITUTED JUDGMENT

- (1) Prior court approval is required for any action specified in Probate Code Section 2580, et seq., such as making gifts or establishing trusts.
- (2) A clear factual showing as required by Probate Code Section 2583 must be presented to the court before the matter will be considered.
- (3) Notice must be given under Probate Code Section 2581, and such notice may require a prior order dispensing with notice to some persons.

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- (4) In the event the court approves the establishment of a trust pursuant to a substituted judgment petition or approves the transfer of conservatorship assets into an existing trust, all future proceedings concerning that trust shall be handled in a case separate from the conservatorship.

(Subd. (a) amended effective January 1, 2018.)

b. ORDERS FOR SUPPORT [Reserved]

(Rule 15.61 amended effective January 1, 2018; adopted effective July 1, 2009; previously adopted as Rule 7.79 effective July 1, 1988.)

15.62 PAYMENTS TO CAREGIVER SPOUSE OF CONSERVATEE

In an account or report indicating that a conservatee’s spouse was hired to provide caregiver services to conservatee, the conservator shall provide the following information:

- (1) A description of the services rendered by the spouse that are above and beyond the care normally provided by one spouse to another.
- (2) A description of the special skills possessed by the spouse enabling him or her to perform these services.
- (3) The benefit to the conservatee of having his or her spouse perform the services instead of a professional caregiver.
- (4) The hours worked by the spouse.
- (5) The hourly rate being paid to the spouse and a justification of that rate. Justification may include a comparison to the rate charged by a professional for the same or similar services.
- (6) Whether caregiving services are being provided through IHSS and if so, the frequency and type of the services provided.
- (7) Whether insurance is in place to cover the caregiver spouse in case of injury and if so, the amount of the periodic premium being paid by the spouse or the conservator.

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(Rule 15.62 adopted effective July 1, 2009.)

15.63 TERMINATION OF CONSERVATORSHIP

a. NOTIFICATION OF CONSERVATEE’S DEATH

The conservator shall file a declaration with the court within 30 days of the conservatee’s death, indicating the date of death, place of death and whether the conservatee died testate or intestate. If the conservatee died testate, the conservator shall notify the conservatee’s nominated executor within 30 days of the conservatee’s death, unless the will fails to nominate an executor or the conservator is the nominated executor.

(Subd (a) adopted effective July 1, 2009.)

b. TERMINATION OF CONSERVATORSHIP FOR REASONS OTHER THAN DEATH OF CONSERVATEE

Termination of a conservatorship for reasons other than the death of the conservatee shall be by noticed petition pursuant to Probate Code sections 1580 et seq., 1860 et seq., or 2626. The filing of a certification of competency issued by the superintendent of a state hospital pursuant to Welfare and Institutions Code Section 7357, or other provisions of law, does not by itself terminate a conservatorship.

(Subd (b) adopted effective July 1, 2009.)

c. HEARING ON PETITION TO TERMINATE

A hearing on a petition to terminate a conservatorship shall be set out a minimum of sixty (60) days in order to allow time for the court investigator’s investigation and report.

(Subd (c) adopted effective July 1, 2009.)

(Rule 15.63 adopted effective July 1, 2009; previously adopted as Rule 7.81 effective July 1, 1988.)

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15.64 CONSERVATORSHIPS FOR DEVELOPMENTALLY DISABLED INDIVIDUALS

A petition to establish a conservatorship for a developmentally disabled adult shall be filed as a limited conservatorship, unless the petition makes a factual showing that a general conservatorship is more appropriate.

(Rule 15.64 adopted effective July 1, 2009.)

15.65 SANCTIONS

Failure to comply with these local rules in conservatorship matters may result in the imposition of sanctions pursuant to Code of Civil Procedure section 575.2.

(Rule 15.65 adopted effective July 1, 2009.)

15.66 ADDITIONAL PROVISIONS FOR CONSERVATORSHIPS OF THE PERSON

a. REVIEW HEARING FOR LEVEL OF CARE ASSESSMENT

At the time of the appointment of a conservator of the person or a conservator of the person and the estate, the court shall set a review hearing to take place four (4) months after the date of appointment to review the conservator’s written assessment of the conservatee’s level of care per Probate Code section 2352.5. The date of the initial compliance review hearing shall be listed as part of the order appointing the conservator. The court may set additional review hearings as needed.

(Rule 15.66 adopted effective January 1, 2012.)

15.67 – 15.99 [RESERVED]

**Superior Court of California
County of Solano**

Rule 15 – Guardianships and Conservatorships

PART THREE: Miscellaneous

15.100 COMPLAINTS CONCERNING COURT INVESTIGATORS

a. WHO MAY MAKE A COMPLAINT

Complaints concerning a court investigator are only accepted from the following individuals:

- (1) A party to the action currently filed with the Solano County Superior Court, including a ward, conservatee, guardian, or conservator;
- (2) A party's attorney;
- (3) An attorney for a ward or conservatee; or,
- (4) Individuals interviewed or contacted in connection with a probate investigation.

(Subd. (a) adopted effective January 1, 2012.)

b. PROCEDURE

The complainant must send his or her complaint in writing to the Supervising Court Investigator. If the complaint concerns the Supervising Court Investigator, the complaint shall be directed to the Court Executive Officer.

The written complaint must explain in detail the reasons for the complaint. Mere disagreement with a court investigator's report is not a sufficient basis for the court to take action on the grievance, and such a complaint may be summarily denied without further investigation.

The Supervising Court Investigator or the Court Executive Officer will conduct an investigation of the matter, which may include consultation with the court investigator. Within 30 days of filing his or her complaint, the complainant will be informed in writing of the results of the investigation and the action taken, if any.

The complainant may appeal the action by noticed motion to the judicial officer assigned to hear the case.

**Superior Court of California
County of Solano**

Rule 15 – Guardianships and Conservatorships

PART THREE: Miscellaneous

(Subd. (b) effective January 1, 2012.)

c. PEREMPTORY CHALLENGE AGAINST COURT INVESTIGATOR

Peremptory challenges against a court investigator shall not be allowed.

(Subd. (c) adopted effective January 1, 2012.)

(Rule 15.100 adopted effective January 1, 2012.)

15.101 DISCOVERY

a. INFORMAL DISCOVERY CONFERENCES

The procedure set forth in Local Rule 3.14 shall apply to informal discovery conferences brought in proceedings governed by Rule 15.

(Subd. (a) adopted effective July 1, 2018.)

(Rule 15.101 adopted effective July 1, 2018.)

**Superior Court of California
County of Solano**

Rule 15 – Guardianships and Conservatorships

APPENDIX

APPENDIX 15-A: SERVICE ADDRESSES FOR GUARDIANSHIPS

Revised effective January 1, 2013

For Relative Guardianships:

Court Investigators Office
Superior Court of California, County of Solano
600 Union Avenue
Fairfield, CA 94533

For Non-Relative Guardianships:

Director
Department of Social Services
744 P Street
Sacramento, CA 95814

Supervisor – Court Unit, Children’s Bureau
Solano County Department of Health and Social Services
275 Beck Avenue MS5-230
Fairfield, CA 94533

**Superior Court of California
County of Solano**



**Superior Court of California
County of Solano**

Rule 16 – Protective Orders

16.1 DOMESTIC VIOLENCE (FAMILY CODE § 6200 ET SEQ.)

a. DECLARATION REGARDING EX PARTE NOTICE GENERALLY NOT REQUIRED

An applicant for ex parte restraining orders made pursuant to the Act need not submit a completed *Declaration Re Notice Upon Ex Parte Application for Orders* or a declaration in substantial compliance therewith.

(Subd (a) relettered effective January 1, 2012; adopted as subsection (a) of Rule 5.8 effective July 1, 1988; previously amended effective January 1, 2008, and July 1, 2008.)

b. CONTENTS OF DECLARATIONS IN SUPPORT OF DOMESTIC VIOLENCE RESTRAINING ORDERS

A mere expression in the declaration of violence or fear will not adequately support the granting of an ex parte order. The declarations must expressly include (1) the actual or approximate date(s) of the incidents alleged, (2) a detailed description of the facts of each incident, and (3) the specific harm caused or threatened.

(Subd (b) relettered and amended effective January 1, 2012; adopted as subsection (a) of Rule 5.8 effective July 1, 1988; previously amended effective January 1, 2008, and July 1, 2008.)

c. DELIVERY TO LAW ENFORCEMENT AGENCY

To obtain enforcement of temporary restraining orders, applicants or their counsel shall deliver a copy of such orders to one or more designated law enforcement agencies. The order shall have a file-endorsed stamp by the Clerk of the Superior Court in the upper right hand corner and the expiration date of the order shall be clearly marked on the face of the document. Temporary restraining orders and orders issued at the order to show cause hearing for delivery to law enforcement agencies shall include a specific expiration date.

(Subd (c) relettered effective January 1, 2012; previously adopted as subsection (a) of Rule 5.8 effective July 1, 1988; previously amended effective January 1, 2008.)

d. NOTIFICATION DUTY ON TERMINATION, EXTENSION OR MODIFICATION

Where an order is issued restraining or enjoining domestic violence and that order is terminated before the expiration date, extended beyond that date or otherwise

**Superior Court of California
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Rule 16 – Protective Orders

modified, the party obtaining relief, or his or her attorney, shall immediately notify the designated law enforcement agency in writing of such termination, extension or modification.

(Subd (d) relettered effective January 1, 2012; adopted as subdivision (d) of Rule 5.8 effective July 1, 1988; previously amended effective January 1, 2008; relettered as subd. (b) of Rule 5.8 effective July 1, 2008.)

e. NOTIFICATION DUTY ON EXTENSION OF TEMPORARY RESTRAINING ORDERS

Where a temporary restraining order is issued ex parte to be effective until the date set for hearing, and thereafter the hearing date is continued to a subsequent date, the temporary restraining order shall terminate unless ordered by the court to remain in effect until a subsequent date. In the event the temporary order is continued by court order to a subsequent hearing date, applicant shall deliver a copy of such order to the designated law enforcement agency.

(Subd (e) amended effective January 1, 2008.)

(Rule 16.1 amended and renumbered effective January 1, 2012; adopted as Rule 5.8 effective July 1, 1988; previously amended effective August 1, 2002, January 1, 2008, and July 1, 2008.)

16.2 CIVIL HARASSMENT (CCP § 527.6)

a. ELIGIBILITY FOR CIVIL HARASSMENT ORDER

Only natural persons may request a restraining order. Entities such as corporations, partnerships, or companies may not seek a civil harassment order.

(Subd. (a) adopted effective January 1, 2012.)

b. REQUESTING OR RESPONDING TO CIVIL HARASSMENT ORDER ON BEHALF OF INCAPACITATED ADULT

If a person seeks a civil harassment protective order on behalf of an incapacitated adult plaintiff, or seeks to respond to a petition for civil harassment protective orders on behalf of an incapacitated adult defendant, the representative must submit an application for appointment of guardian ad litem prior to or concurrently with the appropriate pleading. If the representative has already been appointed as the

**Superior Court of California
County of Solano**

Rule 16 – Protective Orders

protected person’s guardian ad litem or has a power of attorney specifically granting authority concerning litigation, the guardian ad litem application shall not be required, but the representative shall provide the court with proof of his or her authority to act on the incompetent person’s behalf.

(Subd. (b) adopted effective January 1, 2012.)

c. MUTUAL INJUNCTIVE ORDERS

Mutual injunctive orders shall not be granted absent the defendant filing a cross-complaint and providing proof of sufficient notice of the cross-complaint to the plaintiff.

(Subd. (c) adopted effective January 1, 2012.)

d. MINOR SUBJECT TO JUVENILE COURT JURISDICTION

If the plaintiff or defendant is a minor previously determined to be subject to juvenile court jurisdiction, any party with knowledge of that fact shall inform the court at the earliest opportunity so that the matter may be transferred for hearing to the juvenile court per CCP section 374.5.

(Subd. (d) adopted effective January 1, 2012.)

e. ADDRESS OF PARENT OR GUARDIAN

In order to enable the court’s compliance with CCP section 372, subdivision (a)(2), a minor seeking a protective order who appears without a guardian ad litem but who lives with a parent or guardian shall provide the court with the address of at least one parent to whom the court shall send the order once it is issued. This address may be provided at the hearing, or in a confidential declaration filed with the court.

(Subd. (e) adopted effective January 1, 2012.)

(Rule 16.2 adopted effective January 1, 2012.)

**Superior Court of California
County of Solano**

Rule 16 – Protective Orders

16.3 WORKPLACE VIOLENCE (CCP § 527.8)

a. MINOR SUBJECT TO JUVENILE COURT JURISDICTION

If the plaintiff or defendant is a minor previously determined to be subject to juvenile court jurisdiction, any party with knowledge of that fact shall inform the court at the earliest opportunity so that the matter may be transferred for hearing to the juvenile court per CCP section 374.5.

(Subd. (a) adopted effective January 1, 2012.)

b. ADDRESS OF PARENT OR GUARDIAN

In order to enable the court's compliance with CCP section 372, subdivision (a)(2), a minor seeking a protective order who appears without a guardian ad litem but who lives with a parent or guardian shall provide the court with the address of at least one parent to whom the court shall send the order once it is issued. This address may be provided at the hearing, or in a confidential declaration filed with the court.

(Subd. (b) adopted effective January 1, 2012.)

(Rule 16.3 adopted effective January 1, 2012.)

16.4 POSTSECONDARY SCHOOL VIOLENCE (CCP § 527.85)

a. STUDENT CONSENT TO FILING OF APPLICATION

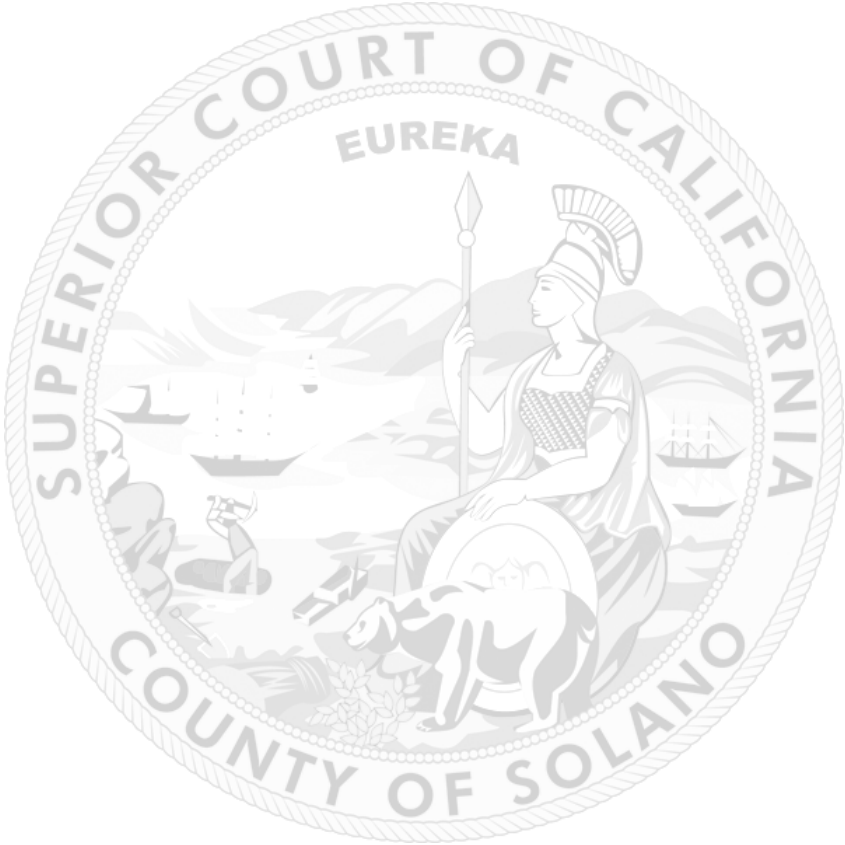
Proof of a student's consent to the filing of the application may be shown through the student's signature on the petition or the attachment of an original written consent signed by the student.

(Subd. (a) adopted effective January 1, 2012.)

(Rule 16.4 adopted effective January 1, 2012.)

16.5 ELDER OR DEPENDENT ADULT ABUSE [Reserved]

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**Superior Court of California
County of Solano**

Rule 17 – Miscellaneous

17.1 PHOTOGRAPHY, VIDEOTAPING, AND ELECTRONIC RECORDINGS

a. PHOTOGRAPHY, VIDEOTAPING, AND ELECTRONIC RECORDINGS IN THE COURTHOUSE

- (1) There is no constitutional right to photograph or otherwise electronically record open judicial proceedings. (*Marin Independent Journal v. Municipal Court* (1993) 12 Cal.App.4th 1712, 1718 ["Electronic recording of judicial proceedings is subject to the discretion of the court"], citing *Nixon v. Warner Communications, Inc.* (1978) 435 U.S. 589, 610.) A courthouse facility qualifies as a nonpublic forum. (*United States v. Grace* (1983) 461 U.S. 171, 178)
- (2) Consistent with case law and California Rules of Court, rule 1.150, photography, filming, videotaping, or electronic recording by the media and general public is not permitted in any part of any courthouse, including but not limited to, entrances, exits, stairways, hallways, elevators, offices, or any other public area within the courthouse, unless by written order of the Presiding Judge.
- (3) Videotaping, photographing, or electronic recording devices may be brought into the courthouse by the media or members of the public, but must be turned off while being transported in any area of the courthouse. Devices that include videotaping, photographing, digital image capture, or electronic recording capabilities—such as cell phones, personal digital assistants (PDAs), or watches—may be brought into the courthouse, provided that the image capturing and recording features are not used.
- (4) Any photography, videotaping, or electronic recording of a courtroom or courtroom proceeding through the courtroom's windows or doors is prohibited.

(Subd. (a) adopted effective January 1, 2020.)

b. PHOTOGRAPHY, VIDEOTAPING, AND ELECTRONIC RECORDINGS IN COURTROOMS

Photography, filming, videotaping, or electronic recording within a courtroom is governed by California Rules of Court, rule 1.150. All requests for any type of video, still photography or audio coverage, including pool cameras, must be made in compliance with California Rules of Court, rule 1.150, and submitted to the judicial officer assigned to hear the case on the designated Judicial Council forms.

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(Subd. (b) adopted effective January 1, 2012.)

c. VIOLATIONS

Any violation of this rule or an order made under this rule is an unlawful interference with the proceedings of the court, and may be the basis for an order terminating media coverage, a citation for contempt of court, or an order imposing monetary or other sanctions as provided by law.

(Subd. (c) adopted effective January 1, 2012.)

(Rule 17.1 adopted effective January 1, 2012.)

17.2 EXPRESSIVE ACTIVITY

a. PURPOSE AND INTENT

It is the purpose and intent of the Court in adopting this local rule to ensure the safe and orderly use of court facilities; to minimize activities which unreasonably disrupt, interrupt, or interfere with the orderly and peaceable conduct of court business in a neutral forum free of actual or perceived partiality, bias, prejudice, or favoritism; to provide for the fair and orderly conduct of hearings and trials; to promote the free flow of pedestrian and vehicular traffic on sidewalks and streets around court facilities; and to maintain proper judicial decorum.

The Court further adopts this local rule to facilitate safe, peaceful, and orderly public access to courthouses unhindered by threats, confrontation, interference, noise pollution, or harassment that may be directed at court users including but not limited to those court users waiting in line outside a courthouse.

The Court intends this local rule to be enforced in a content-neutral fashion. The rule regulates only conduct occurring in and around court facilities without regard to the content of any particular message, idea, or form of speech. The Court does not intend to ban all expressive activities from the environs surrounding court facilities and intends that this local rule be construed so as to provide for ample alternative channels for communication of information near but not within court facilities nor on courthouse grounds. *(See Comfort v. MacLaughlin (C.D. Cal. 2006) 473 F.Supp.2d 1026).*

(Subd. (a) adopted effective January 1, 2018.)

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Rule 17 – Miscellaneous

b. DEMONSTRATIONS, DISTRIBUTIONS, SOLICITATION, AND OTHER EXPRESSIVE ACTIVITY

(1) Definitions

- (a) "Prohibited Activity" shall mean the acts of demonstrating, picketing, parading, proselytizing or preaching, posting written materials, distributing literature or other materials to the general public, soliciting sales or donations, engaging in commercial activity, or engaging in oral or demonstrative protest, education, or counseling, unless otherwise authorized by this local rule or the Court.
- (b) "Walkway" shall mean (a) the area of any corridor or sidewalk, or other path of pedestrian movement, directly from the edge of the public sidewalk nearest an entrance to any building containing a courtroom to that entrance; (b) the area of any corridor or sidewalk leading directly from any parking lot within a curtilage to an entrance to any building containing a courtroom; or (c) a corridor or passageway within a multi-purpose, commercial, or private building that leads directly to the part of the building containing a courtroom.
- (c) "Curtilage" shall mean the area between any building containing a courtroom and the nearest edge of the public sidewalk surrounding the building. It shall not include the area adjacent to that portion of a multi-purpose, commercial or private building that does not contain a courtroom.
- (d) "Courthouse" shall mean any building containing at least one courtroom. It shall also include that portion of a multi-purpose, commercial or private building that contains at least one courtroom.
- (e) "Courtroom" includes any space designated for judicial proceedings, whether permanently or temporarily.

(2) Prohibitions

- (a) No person shall engage in any prohibited activity within a courthouse.

**Superior Court of California
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- (b) No person shall engage in any prohibited activity within the curtilage of a courthouse.
- (c) No person shall obstruct, harass, impede, or interfere with persons entering or leaving a courthouse, persons waiting in line to enter a courthouse, or persons inside a courthouse.
- (d) No person shall approach persons entering or leaving a courthouse, persons waiting in line to enter a courthouse, or persons inside a courthouse, for the purpose of engaging in any prohibited activity.
- (e) No person shall engage in any prohibited activity in or near a courthouse with the intent to interfere with, obstruct, or impede the administration of justice or with the intent to influence any judge, juror, witness, officer of the court, or court personnel in the discharge of his or her duty.
- (f) No person shall use amplification equipment to engage in prohibited activity in a manner that harasses or interferes with persons inside a courthouse, with persons entering or leaving a courthouse, or with persons waiting in line to enter a courthouse.
- (g) No person shall publish, post, or distribute any written material other than written material relating to official Court business published, posted or distributed by duly authorized Court personnel, inside any Court facility of this County, without the prior written approval of this Court.

(3) Exclusions

- (a) This local rule shall not apply to authorized court personnel or law enforcement officers in the performance of their official duties.
- (b) Subdivisions (a), (b), and (g) of Section (b)(2) above shall not apply to persons engaged in the stationary solicitation of sales as part of any commercial, primarily non-expressive activity

(including but not limited to the sale of newspapers, reading materials, sundries, or food stuffs) expressly authorized by a

**Superior Court of California
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written use permit, license, or agreement from the County or the Court or the Judicial Council or other owner of a building containing a courtroom authorizing that activity in a specific space not dedicated to court functions.

(4) Severability Clause

If any provision of this local rule or the application thereof to any person or circumstances is held invalid, the validity of the remainder of the local rule and the application of such provision to other persons and circumstances shall not be affected thereby.

(5) Delegation

To the extent the terms of this local rule do not accomplish its stated purpose at a courthouse, on delegation by the Presiding Judge, the Supervising Judge responsible for that courthouse or his or her designee is hereby authorized to issue an order to accomplish the stated purpose of this local rule.

(Subd. (b) adopted effective January 1, 2018.)

c. COMPLIANCE WITH LAW ENFORCEMENT

While on or in the premises of any courthouse, all persons shall comply with the lawful requests, directions, and orders of any law enforcement officers and their agents in the performance of their duties.

(Subd. (c) adopted effective January 1, 2018.)

d. POSTING AND SERVICE OF LOCAL RULE

This local rule shall be posted at each public entrance to a courthouse and at such other places that will reasonably provide notice of this local rule to persons entering such courthouse. The Sheriff of Solano County and his deputies and their agents are directed to serve a copy of this local rule personally on any person who appears to be in violation thereof, to advise such person of the apparent violation, and, if the apparent violation continues after such notice, to immediately notify the Court's Executive Officer, Presiding Judge, or Supervising Judge responsible for that courthouse, as may be available in that order, so that the Court can determine whether proceedings should be initiated to ensure compliance with the local rule.

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This local rule shall not preclude any law enforcement officer from taking appropriate steps to ensure the orderly and peaceable conduct of court business at a courthouse.

(Subd. (d) adopted effective January 1, 2018.)

e. PENALTIES

Violation of this local rule may result in the imposition of sanctions as permitted by law and/or prosecution for criminal violations.

(Subd. (e) adopted effective January 1, 2018.)

(Rule 17.3 adopted effective January 1, 2018.)

17.3 LODGING OF DOCUMENTS

a. PROPOSED ORDERS

(1) Receipt of Proposed Orders

For cases that are not kept in electronic form, proposed orders for a motion, application, or petition may be lodged with the court concurrently with the motion, application, or petition, or at any time thereafter.

For cases that are kept in electronic form, proposed orders for a motion, application, or petition may be lodged with the court up to a week prior to the scheduled hearing on the motion, application, or petition.

(2) Destruction of Proposed Orders

If a judicial officer adjudicates a motion, application, or petition at a hearing, a proposed order submitted in connection with that motion, application, or petition may be destroyed if it is not signed and filed within 30 days of the date of the hearing.

If a judicial officer takes a motion, application, or petition under submission, a proposed order submitted in connection with that motion, application, or petition may be removed and destroyed if the proposed

**Superior Court of California
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order is not signed and filed within 30 days of the date the judicial officer files a ruling or decision on the submitted matter.

If a litigant or attorney submits a proposed order that is clearly intended to replace an existing lodged proposed order, the existing lodged proposed order may be immediately removed and destroyed.

(Subd. (a) adopted eff. July 1, 2019.)

(Rule 17.4 adopted effective July 1, 2019.)

17.4 LODGING, STORAGE, AND RETURN OF TRIAL EXHIBITS [RESERVED]

17.5 PAYMENT WITH COIN

The court is not required to accept coins as payment for fees or costs. (Gov. Code, § 68083.) However, the court may in its discretion elect to accept payment in coin in an amount up to \$10.00 (ten dollars). Coin equal to or in excess of the following amounts shall be wrapped in standard coin wrappers:

- (1) Fifty cents (\$0.50) in pennies.
- (2) Two dollars (\$2.00) in nickels.
- (3) Five dollars (\$5.00) in dimes.
- (4) Ten dollars (\$10.00) in quarters.

The person presenting wrapped coins for payment shall have their name and case number written on the wrapped coins. In the event the actual wrapped amount of coin is less than the amount stated on the wrapper, the person who tendered the coins for payment shall be liable to the court for the difference.

(Rule 17.6 adopted effective July 1, 2019.)

17.6 APPOINTMENT OF ELISOR

- A. Where one of the parties fails to execute a document necessary to carry out a court order, the Clerk of the Superior Court, or the Clerk's authorized representative or designee, may be appointed as elisor to sign the document.

**Superior Court of California
County of Solano**

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- B. When applying for an appointment of an elisor, the application and proposed order must designate “The Clerk of the Court or Designee” as the elisor and indicate for whom the elisor is being appointed and in what capacity they are to sign the document.
- C. An application for appointment of an elisor may be made ex parte or by emergency request in family law. The application must not set forth a specific court employee. The order must expressly identify the document(s) being signed and a copy of the document(s) must be attached to the proposed order. The original document, presented for signature by the elisor must match the copy of the document attached to the proposed order.
- D. The order shall clearly identify the documents: A deed must state the type of deed (i.e. grant deed, interspousal transfer deed, et cetera). Escrow documents must be listed separately (i.e. Escrow Instruction Dated, Disclosure Regarding Real Estate Agency Relationship, Hazard Report, et cetera). The sample copy shall be highlighted in the location(s) where the elisor is to sign his/her name. SUPERIOR COURT OF CALIFORNIA, IN AND FOR THE COUNTY OF SOLANO.
- E. Beneath the signature line(s) on the sample copy the moving party shall print the language being requested to identify the elisor’s signature.
- F. The declaration supporting the application must include specific facts establishing the necessity for the appointment of an elisor.
- G. If the Court grants the application of an elisor, the moving party shall contact Court Administration to arrange for a time for the actual signing of the documents. The appointed elisor has up to three (3) court days to complete the actual signing of the documents. Any exceptions to the three day period shall be addressed on a case-by-case basis by the Court.
- H. If the elisor is signing documents requiring notarization, the applicant must arrange for a notary public to be present when the elisor signs the documents.

(Rule 17.6 adopted effective January 1, 2020.)

17.7 ELIMINATION OF BIAS COMMITTEE

Pursuant to California Rules of Court, rule 10.20, a committee shall be established for the purpose of addressing and remedying actual or perceived bias in connection with judicial

**Superior Court of California
County of Solano**

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proceedings or court operations to ensure access to justice in a manner that is fair and impartial to all participants. Bias includes, but is not limited to: discrimination or harassment based upon race, gender, disability, national origin, religion, sexual orientation and any other protected class identified by state or federal law.

The purpose of the committee is to advance Standard of Judicial Administration 10.20 and to promote inclusion and equity in the justice system through education and activities designed to address explicit and implicit bias.

The Presiding Judge shall appoint the members of the Committee who shall serve for a 2 year term coterminous with the term of the Presiding Judge. Membership of the Committee should include a minimum of two (2) judicial officers, two (2) court employees, two (2) members of a local bar association and two (2) community representatives.

(Rule 17.7 adopted effective July 1, 2022.)

**Superior Court of California
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APPENDIX

MAY 16 2016

1 **IN THE SUPERIOR COURT OF CALIFORNIA**
2 **IN AND FOR THE COUNTY OF SOLANO**

By M. Belmont
DEPUTY CLERK

4 Standing Order No. M-1-2016

5 **WEAPONS IN THE COURTHOUSE**

6
7
8
9 This standing order amends and supersedes Standing Order 8771, filed January 28,
10 2008, effective upon the date of filing.

11 **GOOD CAUSE APPEARING, IT IS HEREBY ORDERED:**

12 1. All persons entering a building or location designated as a courthouse or a location
13 for judicial proceedings, whether temporary or on-going, are prohibited from carrying or
14 possessing the following items while in the building or designated location:

15 a. Firearms, including but not limited to cane guns, firearms not immediately
16 recognizable as a firearm, undetectable firearms, and wallet guns (Pen. C. §§ 24410, 24510,
17 24610, and 24710);

18 b. Knives, including but not limited to sheathed knives, air gauge knives, belt
19 buckle knives, cane swords, lipstick case knives, shobi-zues, undetectable knives, writing
20 pen knives, ballistic knives, and dirks or daggers (Pen. C. §§ 20200, 20310, 20410, 20510,
21 20610, 20710, 20810, 20910, 21110, 21310, and 21510);

22 c. Knuckles, including but not limited to composite knuckles, hard wooden
23 knuckles, and metal knuckles (Pen. C. §§ 21710 and 21810);

24 d. Nunchaku (Pen. C. § 22010);

25 e. Leaded canes, saps, and other similar weapons (Pen. C. § 22210); and,

Standing Order

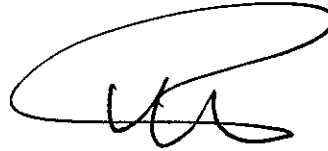
1 f. Shuriken (Pen. C. § 22410.)

2 2. Active on-duty law enforcement officers not appearing as a party or an off-duty
3 witness in an action or proceeding shall be exempt from the provisions of Paragraph 1.

4 3. The issuance of a concealed carry weapons permit or license shall not exempt any
5 person from the provisions of Paragraph 1.

6 It is so ordered.

7 Date: May 13, 2014



8 **Robert C. Fracchia**
9 **Presiding Judge**

NOV 15 2017

M. B. ...

~~DEPUTY CLERK~~

1
2 IN THE SUPERIOR COURT OF CALIFORNIA
3 IN AND FOR THE COUNTY OF SOLANO
4

5 STANDING ORDER NO. MISC-8-2017
6

7 STANDING ORDER RE: EXPRESSIVE
8 ACTIVITY
9

10 **TO ALL PERSONS ENTERING COURTHOUSES IN SOLANO COUNTY:**

11 It is the purpose and intent of the Court in issuing this Standing Order to ensure
12 the safe and orderly use of court facilities; to minimize activities which unreasonably
13 disrupt, interrupt, or interfere with the orderly and peaceable conduct of court business
14 in a neutral forum free of actual or perceived partiality, bias, prejudice, or favoritism; to
15 provide for the fair and orderly conduct of hearings and trials; to promote the free flow
16 of pedestrian and vehicular traffic on sidewalks and streets around court facilities; and
17 to maintain proper judicial decorum.

18 The Court further issues this Standing Order to facilitate safe, peaceful, and
19 orderly public access to courthouses unhindered by threats, confrontation, interference,
20 noise pollution, or harassment that may be directed at court users including but not
21 limited to those court users waiting in line outside a courthouse.

22 The Court intends this Standing Order to be enforced in a content-neutral
23 fashion. The Order regulates only conduct occurring in and around court facilities
24 without regard to the content of any particular message, idea, or form of speech. The
25 Court does not intend to ban all expressive activities from the environs surrounding
26 court facilities and intends that this Order be construed so as to provide for ample
27 alternative channels for communication of information near but not within court facilities

1 nor on courthouse grounds. (See *Comfort v. MacLaughlin* (C.D. Cal. 2006) 473
2 F.Supp.2d 1026).

3 **THE COURT HEREBY ORDERS:**

4 **1. Demonstrations, Distributions, Solicitation, and Other Expressive Activity**

5 **a. Definitions :**

6 i. "Prohibited Activity" shall mean the acts of demonstrating,
7 picketing, parading, proselytizing or preaching, posting written materials, distributing
8 literature or other materials to the general public, soliciting sales or donations, engaging
9 in commercial activity, or engaging in oral or demonstrative protest, education, or
10 counseling, unless otherwise authorized by this Order or the Court.

11 ii. "Walkway" shall mean (a) the area of any corridor or sidewalk, or
12 other path of pedestrian movement, directly from the edge of the public sidewalk nearest
13 an entrance to any building containing a courtroom to that entrance; (b) the area of any
14 corridor or sidewalk leading directly from any parking lot within a curtilage to an entrance
15 to any building containing a courtroom; or (c) a corridor or passageway within a multi-
16 purpose, commercial, or private building that leads directly to the part of the building
17 containing a courtroom.

18 iii. "Curtilage" shall mean the area between any building containing a
19 courtroom and the nearest edge of the public sidewalk surrounding the building. It shall
20 not include the area adjacent to that portion of a multi-purpose, commercial or private
21 building that does not contain a courtroom.

22 iv. "Courthouse" shall mean any building containing at least one
23 courtroom. It shall also include that portion of a multi-purpose, commercial or private
24 building that contains at least one courtroom.

25 v. "Courtroom" includes any space designated for judicial
26 proceedings, whether permanently or temporarily.

1 **b. Prohibitions**

2 i. No person shall engage in any prohibited activity within a
3 courthouse.

4 ii. No person shall engage in any prohibited activity within the
5 curtilage of a courthouse.

6 iii. No person shall obstruct, harass, impede, or interfere with persons
7 entering or leaving a courthouse, persons waiting in line to enter a courthouse, or
8 persons inside a courthouse.

9 iv. No person shall approach persons entering or leaving a
10 courthouse, persons waiting in line to enter a courthouse, or persons inside a
11 courthouse, for the purpose of engaging in any prohibited activity.

12 v. No person shall engage in any prohibited activity in or near a
13 courthouse with the intent to interfere with, obstruct, or impede the administration of
14 justice or with the intent to influence any judge, juror, witness, officer of the court, or
15 court personnel in the discharge of his or her duty.

16 vi. No person shall use amplification equipment to engage in
17 prohibited activity in a manner that harasses or interferes with persons inside a
18 courthouse, with persons entering or leaving a courthouse, or with persons waiting in
19 line to enter a courthouse.

20 vii. No person shall publish, post, or distribute any written material
21 other than written material relating to official Court business published, posted or
22 distributed by duly authorized Court personnel, inside any Court facility of this County,
23 without the prior written approval of this Court.

24 **c. Exclusions**

25 i. This Order shall not apply to authorized court personnel or law
26 enforcement officers in the performance of their official duties.

1 ii. Sections 1(b)(i), (ii), and (vii) above shall not apply to persons
2 engaged in the stationary solicitation of sales as part of any commercial, primarily non-
3 expressive activity (including but not limited to the sale of newspapers, reading
4 materials, sundries, or food stuffs) expressly authorized by a written use permit, license,
5 or agreement from the County or the Court or the Judicial Council or other owner of a
6 building containing a courtroom authorizing that activity in a specific space not dedicated
7 to court functions.

8 **d. Severability Clause**

9 i. If any provision of this Order or the application thereof to any
10 person or circumstances is held invalid, the validity of the remainder of the Order and
11 the application of such provision to other persons and circumstances shall not be
12 affected thereby.

13 **e. Delegation**

14 i. To the extent the terms of this Order do not accomplish its stated
15 purpose at a courthouse, on delegation by the Presiding Judge, the Supervising Judge
16 responsible for that courthouse or his or her designee is hereby authorized to issue an
17 order to accomplish the stated purpose of this Order.

18 **2. Compliance with Law Enforcement**

19 While on or in the premises of any courthouse, all persons are ordered to comply
20 with the lawful requests, directions, and orders of any law enforcement officers and their
21 agents in the performance of their duties.

22 **3. Posting and Service of Order**

23 This Order shall be posted at each public entrance to a courthouse and at such
24 other places that will reasonably provide notice of this Order to persons entering such
25 courthouse. The Sheriff of Solano County and his deputies and their agents are directed
26 to serve a copy of this Order personally on any person who appears to be in violation
27 thereof, to advise such person of the apparent violation, and, if the apparent violation

1 continues after such notice, to immediately notify the Court's Executive Officer,
2 Presiding Judge, or Supervising Judge responsible for that courthouse, as may be
3 available in that order, so that the Court can determine whether proceedings should be
4 initiated to ensure compliance with this Order. This Order shall not preclude any law
5 enforcement officer from taking appropriate steps to ensure the orderly and peaceable
6 conduct of court business at a courthouse.

7 **4. Penalties**

8 Violation of this Order may result in the imposition of sanctions in amounts of up
9 to \$1,500 per violation pursuant to Code of Civil Procedure section 177.5 and/or
10 prosecution for criminal violations.

11 **5. Effective Date**

12 This order shall be effective January 1, 2018.

13
14 GOOD CAUSE APPEARING, IT IS SO ORDERED.

15 11/15/17

16 _____
Date



17 _____
Robert C. Fracchia
Presiding Judge

**Superior Court of California
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**Superior Court of California
County of Solano**

Rule 18 – Court Reporters

18.1 POLICY REGARDING NORMAL AVAILABILITY AND UNAVAILABILITY OF COURT REPORTERS

A. POLICY REGARDING AVAILABILITY OF COURT REPORTERS

Effective February 1, 2022, official court reporters are normally available in all felony and juvenile proceedings, civil commitment and contempt proceedings, LPS conservatorships and trials, habeas corpus evidentiary proceedings, grand jury proceedings when requested by the district attorney, Family Law proceedings pursuant to Family Code, §§ 3042, 3410, 7892 and 9005 and any other proceeding in which an official court reporter is mandated by law.

Official court reporters are not normally available in all other civil, family and probate matters including pretrial proceedings, proceedings related to restraining orders, and court and jury trials. Official court reporters are not normally available in all Department of Child Support Services proceedings.

Infractions, misdemeanor, small claims and limited civil proceedings will be reported electronically as authorized by statute.

B. REQUESTS FOR OFFICIAL COURT REPORTER IN PROCEEDING NOT NORMALLY REPORTED

Due to the statewide shortage of court reporters, the court is unable to provide court reporters for matters in which the services of a reporter are not mandated by statute or precedent. Requests for reporters from litigants who do not have active fee waivers in cases in which reporters are not normally available will not be processed.

Individuals who are indigent and have a previously approved fee waiver may request a court reporter for proceedings in which reporters are not normally available and electronic reporting is not expressly authorized by statute. (*Jameson v Desta* (2018) 5 Cal.5th 594.) Persons with approved fee waivers may submit a request for a court reporter by filing Judicial Council Form FW 020 at least 10 calendar days prior to a hearing, or if the hearing is set in less than 10 calendar days, as soon as possible

C. PROCUREMENT OF PRIVATE REPORTER PRO TEMPORE

For matters in which the court does not normally provide an official court reporter, a party or parties may privately arrange for certified shorthand reporter services to serve as the official reporter pro tempore at the party's own expense pursuant to Government Code section 68086 and California Rules of Court, rule 2.956.

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Rule 18 – Court Reporters

There can only be one official record of court proceedings and only one reporter appointed by the court may report a court proceeding. (CCP, § 273; Govt. Code, §§ 66941, 70043, 70044.) When a party arranges for a reporter, the reporter must be appointed as an official reporter pro tempore before the hearing begins. Every reporter shall complete and sign the Request for Appointment of Official Reporter Pro Tempore (Form 3021- CV), unless a form 3021-CV for that reporter is already filed with the court in that case.

The party arranging for an official reporter pro tempore is responsible for paying the reporter's fees although the parties may arrange to share the fees. If the parties are unable to agree on a reporter, the court will select the reporter to be used.

A reporter appointed as a Reporter Pro Tempore shall agree to the following:

- (1) The reporter has a valid, current California Certified Shorthand Reporter License and is in good standing with the Court Reporters' Board of California.
- (2) The reporter will provide current contact information to the court.
- (3) All fees for reporting services, including appearance, transcript and real-time fees, are the responsibility of the party or parties who arranged for the reporter's services and may not be charged to the court.
- (4) The reporter will comply with statutes and rules applicable to official reporters pro tempore, including the duty to timely prepare transcripts, including those for appeals, in the proper form.
- (5) The reporter will comply with the court's requirements regarding uploading electronic archiving of notes to YesLaw, or a subsequent electronic database adopted by the court, within 48 hours of the date of the proceedings except in extenuating circumstances as approved by the Court Reporter Coordinator.
- (6) The reporter will follow directions from the court and will be subject to the jurisdiction of the court to the same extent as an official reporter.
- (7) The reporter will be available for read back of notes taken during a jury trial within 1 hour of the court's request.
- (8) If providing real-time reporting, the court reporter will furnish the necessary equipment.

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D. PROCEEDINGS WHICH HAVE BEEN ELECTRONICALLY RECORDED

In proceedings which have been electronically reported pursuant to statute or pursuant to a finding by the court that electronic recording is necessary to ensure due process, the court will not provide a reporter to transcribe any electronic recording.

(Rule 18.1 Adopted effective July 1, 2022; Amended effective July 1, 2023.)

18.2 COURT REPORTER TRANSCRIPTS

A. MINIMUM TRANSCRIPT FORMAT STANDARDS

A licensed Court Reporter or Pro Tem Reporter employed by the Superior Court of California, County of Solano, shall comply with the following transcript format standards when producing a transcript from a court proceeding:

- (1) There shall be no fewer than 28 typed text lines per page;
- (2) A full line of text shall be no less than 64 characters;
- (3) Font shall be Courier, 12 pt;
- (4) Each question and answer shall begin on a separate line;
- (5) Text shall begin at the closest point to the left margin (left margin is defined as the first character of a line text);
- (6) Q and A symbols shall appear within the first 3 spaces from the left-hand margin;
- (7) Beginning text shall appear 2 spaces after Q and A;
- (8) Carry-over Q and A lines shall begin at the left-hand margin;
- (9) Colloquy and paragraphed material shall begin no more than 7 spaces from the left-hand margin with carry-over colloquy to the left-hand margin;
- (10) Speaker identification and Q shall be on the same line; and,
- (11) There shall be no blank lines on the first page of the appearance drop- in/beginning paragraphs.

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Rule 18 – Court Reporters

Failure to comply with the standards, as noted above, constitutes grounds for corrective action, up to and including termination and filing a report with the Court Reporters Board of California.

(Subd. (a) adopted effective January 1, 2013.)

B. REQUESTS FOR TRANSCRIPTS

(1) Forms to be Submitted

Subject to the exceptions set forth below, all court reporter transcripts shall be requested by submitting a request for transcript form designated by the court. The form is available on the court’s website or in paper form at any clerk’s office.

The form is not required in the following circumstances:

- (a) In cases where automatic preparation of a transcript is mandated by law.
- (b) In civil cases where the transcript is being requested in connection with an appeal. All appellate transcript designations shall be done as directed by the applicable Judicial Council form(s) and California Rules of Court.

(2) Cost of Transcripts

- (a) Except as otherwise provided by law or by California Rules of Court:
 - 1. The party requesting a transcript is responsible for the costs associated with the preparation and printing of all transcripts requested by that party.
 - 2. If the proceeding has not previously been transcribed, a party’s transcript request shall automatically include preparation of one original transcript plus one copy. The original transcript shall be retained by the court.
- (b) A party who believes he or she is unable to afford some

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Rule 18 – Court Reporters

or all of his or her transcription costs may contact the Court Reporters Board of California concerning his or her eligibility for assistance from the Transcript Reimbursement Fund.

(3) Transcripts Requested by Non-Parties in Juvenile Matters

Any non-party requesting a reporter's transcript of a juvenile proceeding must file a *Petition for Disclosure* (Judicial Council form no. 570).

(Rule 18.2 amended effective July 1, 2022; adopted as Rule 17.2 effective January 1, 2013.)

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APPENDIX

NAME, ADDRESS, AND TELEPHONE NUMBER OF PARTY WITHOUT ATTORNEY	STATE BAR NO.:	FOR COURT USE ONLY
ATTORNEY FOR: <i>(Name)</i> :		
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SOLANO		
STREET ADDRESS: CITY AND ZIP CODE: BRANCH NAME:		
PLAINTIFF:		
DEFENDANT:		
REQUEST FOR APPOINTMENT OF OFFICIAL REPORTER PRO TEMPORE		CASE NUMBER:

Hearing/Trial Date: _____ Department *(if known)*: _____

1. Reporter Information

Name: _____ License No.: _____
(PRINT)

Business Address: _____
STREET CITY ZIP CODE

Email Address: _____ Telephone No.: _____

2. Court Reporter Agreement

I, _____, accept this appointment as an official reporter pro tempore in this matter and confirm and agree that:

- (1) I have a valid and current California Certified Shorthand Reporter License and I am in good standing with the Court Reporters Board of California;
- (2) I am not a current full-time employee of the court and appointment as an official reporter pro tempore will not interfere with my obligation as a court employee;
- (3) I will provide current contact information with the court as directed by the Court Reporter Coordinator;
- (4) All fees for reporting services, including appearance, transcript and real-time fees, are the responsibility of the party or parties who arrange for the reporter services and may not be charged to the court;
- (5) I will comply with statutes and rules applicable to official reporter pro tempore, including the duty to timely prepare transcripts, including those for appeals, in the proper form;
- (6) I will demonstrate the highest standards of ethics and impartiality in the performance of my duties;
- (7) I will comply with the court's requirements regarding uploading electronic archiving of notes within 48 hours of the date of the proceedings except in extenuating circumstances and as approved in advance by the Court Reporter Coordinator, or making other arrangements if the only notes are in paper form;

CASE NAME:	CASE NUMBER:
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- (8) I will comply with the court's requirements regarding uploading of transcripts to YesLaw. Instructions are on the court's website;
- (9) I will follow directions from the court and will be subject to the jurisdiction of the court to the same extent as an official reporter;
- (10) I will be available for read-back of notes taken during a jury trial within 30 minutes of the court's request;
- (11) If providing real-time reporting or other litigation support services, I am responsible for providing and connecting the necessary equipment. Instructions will be provided by the Court Reporter Coordinator.

Date: _____ Signature: _____

ORDER APPOINTING OFFICIAL REPORTER PRO TEMPORE

Pursuant to Government Code Sections 68086 and 70044 and rule 2.956 the California Rules of Court and the signature of at least one of the appearing parties set forth on the pages following this order, the above identified Certified Shorthand Reporter is appointed as an official reporter pro tempore for these proceedings to be transcribed by the official reporter pro tempore and may be ordered to lodge a copy of the transcript with the Court.

IT IS ORDERED.

Date: _____

 Judicial Officer

CASE NAME: _____	CASE NUMBER: _____
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Request for Appointment

The parties or their counsel listed below request that the Court appoint an official reporter pro tempore as set forth in the Court Reporter Agreement and Order Appointing Official Reporter Pro Tempore herein.

Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____
Date: _____ Name: _____ (PRINT) _____ Attorney for: _____ Signature _____

Additional Stipulations are attached to this document.

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Rule 19 – Remote Appearances

19.1 CIVIL REMOTE APPEARANCES

a. PROCEEDINGS AUTHORIZED FOR REMOTE APPEARANCES

Remote proceedings are proceedings in which the court utilizes technology to permit a simultaneous audio and video appearance by an attorney, party or witness. In person appearances remain available. No litigant or attorney shall be required to appear remotely. The court retains the discretion to require personal appearances by any litigant, attorney or witness.

Remote proceedings are normally authorized in all civil matters, EXCEPT as follows:

The ability of the litigants to appear at the following proceedings will be specifically addressed by the assigned judicial officer during trial setting and/or in the Notice of Trial/Trial Management Orders or Case Management Orders issued by the department:

1. Mandatory Settlement Conferences;
2. Trial Management Conferences;
3. Court trials; and
4. Jury trials.

Remote proceedings are normally not authorized for the following civil matters:

5. Orders of Examination;
6. Contempt Proceedings;
7. Returns on Bench Warrants; and
8. Any other proceeding in which the court has previously denied the ability to appear via remote technology.

The court finds that these proceedings are normally not suitable for a remote proceeding and that an in-person appearance will materially assist in the determination of the proceeding or in the effective management or resolution of the case.

Telephonic appearances are distinct from remote appearances and may be made utilizing CourtCall for only the appearances authorized in advance by the assigned judicial officer. Telephonic appearances are not authorized for any evidentiary proceeding unless expressly authorized in advance by the assigned judicial officer.

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b. NOTICE OF REMOTE APPEARANCE

Notice of the intent to appear remotely may be given orally during a court proceeding or by service on all other parties or persons who are entitled to receive notice pursuant to California Rules of Court, rule 3.672. Remote access to the first hearing by Zoom shall be inferred as a request to appear remotely. At an initial court appearance, the judge may inquire whether the attorney or party intends to appear remotely for the duration of the case (except as to those hearings for which specific permission must be granted.) For matters in which remote appearances are expressly allowed pursuant to this policy, the court does not require the advance filing and service of a notice of appearance for remote appearances, including case management conferences and law and motion hearings. Parties or attorneys who give written notice of an intent to appear remotely must use the mandatory Judicial Council form for that purpose (Form RA-010) which must be filed no later than five court days prior to the hearing. Parties who object to a remote appearance as authorized by this policy may serve and file an Opposition to Remote Proceedings at Evidentiary Hearing or Trial (Form RA-015) and proposed order as set forth in California Rules of Court, rule 3.672.

c. PROCEDURE FOR REMOTE APPEARANCE

The Zoom link for each department utilizing the single Zoom link process (currently Departments 3, 4 and 12) will be posted in two sites on the court website (www.solano.courts.ca.gov): 1) On the home page, under the Divisions link, under the Civil section, there will be a tab entitled Remote Appearances; and 2) on each department's Tentative Rulings page also found under the Divisions link under the Civil section. Individuals who wish to observe a proceeding as a member of the public may always appear in the courtroom in person. Judicial officers may exercise discretion to authorize additional attendees to observe proceedings based upon specific case needs, the ability of the court to appropriately manage the hearing and on any other special needs.

Departments continuing to send Zoom invitations (currently Department 22) will initiate any remote court proceeding via an email calendar invitation sent to the attorney of record at the email address of record or to a litigant who appears pro se at his or her email address of record. Local Form 9000 may be used to update the court regarding contact information. The invitation will include a description of the meeting, the date and time, a link to the meeting, a meeting identification number and passcode. It is the responsibility of the handling attorney to forward the remote court invitation to any other attorney appearing in the attorney of record's place. Counsel may then forward the invitation to their own client to allow the client to observe the proceeding. The remote court invitation shall not be forwarded to any other persons, due to the difficulty, interruption and delay associated with handling multiple remote

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Rule 19 – Remote Appearances

appearances. The courtroom is open should any other individuals or members of the public wish to attend a hearing in person.

Cases which are calendared for matters in which a remote appearance is not authorized by policy or prior judicial order will not receive a remote court invitation. The email used to send the remote court invitation shall not be used to communicate with the court. Any communications sent to the email address will not be read, answered or forwarded. No documents shall be submitted to the email address. Any effort to make such a communication is considered an impermissible ex parte communication.

d. CONDUCT DURING REMOTE APPEARANCES

Parties are responsible for promptly joining the remote hearing at the scheduled time and date. Litigants are encouraged to review the department calendar for the specific date and time of their matter.

The chat function may not be utilized by any party during the proceedings except to alert the court as to any technical or audio difficulties. Other than the court, no person may record, video or photograph any portion of the proceeding unless expressly authorized by the assigned judicial officer.

Each participant in a remote court proceeding is expected to conduct himself or herself in the same manner as he or she would if the proceeding were conducted in a public courtroom (i.e. appropriate courtroom attire, no eating or drinking, cell phones switched to silent). Due to the difficulty in managing remote appearances, other than the authorized participant, no other persons shall simultaneously participate in the remote appearance with the same computer or smartphone unless expressly authorized by the assigned judicial officer.

Participants shall update their profile name so that it is consistent with the name used in regular court operations and ensure the name listed includes a first and last name. Upon entry into remote court, participants shall ensure that they are muted. Participants shall make every effort to reduce or eliminate background noises and distractions that may interfere with the remote court proceedings. In the event that the participation of any individual interferes with the remote court proceeding, intentionally or inadvertently, that participant may be muted, including both audio and video participation, and/or the participant may be removed from the proceeding by being returned to the waiting room or dismissed by the court.

e. PRESENTATION OF EVIDENCE

Documentary or physical evidence may not be presented remotely. Should a party intend to present documentary or physical evidence, the party shall cause the exhibits

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to actually be received by the court and the opposing party or parties no less than 10 calendar days prior to the hearing unless otherwise expressly ordered by the assigned judicial officer. An appointment may be made with the clerk's office to submit the exhibits. Parties are advised that utilizing the drop-box may not ensure timely receipt and processing of the exhibits by the court.

Exhibits may not be filed with the court without a cover pleading which includes a caption identifying the parties, the case number and a title of the pleading (i.e. Trial Management Packet, Declaration, List of Exhibits, etc.) and a list that itemizes the attached exhibits. It is the burden of the party presenting evidence at a remote hearing to ensure that the evidence is actually received by the court in a timely fashion prior to the hearing. The failure to timely submit documentary or physical exhibits for use during any evidentiary proceeding may result in the exclusion of that evidence.

f. INABILITY OR FAILURE TO MAKE APPROPRIATE REMOTE APPEARANCE

Court proceedings are open to the public. By choosing to appear remotely, a participant represents that he or she is proficient in the use of remote technology and shall comply with the rules regarding its use. It is expected that participants shall practice in advance with the remote court application to ensure familiarity with use of the technology and that the participant's equipment actually enables the participant to be clearly seen on video and heard via audio. Participants should make plans for a second or redundant system in the event of equipment failure or an internet outage. The court may not delay the proceedings due to a participant's inability to use remote court technology or challenges due to malfunctioning equipment or internet.

g. OPPOSITION TO REMOTE APPEARANCE

Any party opposing the use of a remote appearance by another party may object by using the procedures set forth in the California Rules of Court, Rule 3.672 and filing the appropriate mandatory judicial council form and proposed order. (Form RA-015.)

h. MISCELLANEOUS

In the event of a conflict between these rules and the Code of Civil Procedure or the California Rules of Court, the Code of Civil Procedure and California Rules of Court shall control.

i. SANCTIONS FOR UNAUTHORIZED REMOTE APPEARANCES

Parties who appear remotely at any proceeding at which the court has not authorized a remote appearance, or has expressly ordered one not to take place, or during which they conduct themselves in a manner that violates the rule or requires the court to

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continue the hearing for an in person appearance may be sanctioned pursuant to Local Rule 4.13.

19.2 CRIMINAL REMOTE APPEARANCES [Reserved]

19.3 FAMILY REMOTE APPEARANCES

a. PROCEEDINGS AUTHORIZED FOR REMOTE APPEARANCES

Remote proceedings are proceedings in which the court utilizes technology to permit a simultaneous audio and video appearance of an attorney, party or witness. Remote proceedings are normally authorized in all family matters, EXCEPT as follows:

1. Trial Management Conferences;
2. Court trial, if not expressly authorized by the assigned judicial officer at trial-setting;
3. Contempt proceedings;
4. Adoptions and Petitions to Declare a Minor Free; and
5. Any other proceeding in which the court has previously denied the ability to appear via remote technology.

The court finds that these proceedings are not normally suitable for a remote proceeding which utilizes a simultaneous audio and video appearance and that an in-person appearance will materially assist in the determination of the proceeding or in the effective management or resolution of the case.

Telephonic appearances are distinct from remote appearances and may be made utilizing CourtCall for only the appearances authorized in advance by the assigned judicial officer.

Telephonic appearances are not authorized for any evidentiary proceeding unless expressly ordered by the assigned judicial officer.

b. PROCEDURE FOR REMOTE APPEARANCES

The court will initiate any remote court proceeding. The remote court proceeding will typically be initiated via an email calendar invitation sent to the attorney of record at the email address of record or to a self-represented litigant at his or her email address of record. Local Form 9000 may be used to update the court regarding contact information. The invitation will include a description of the meeting, the date and time, a link to the meeting, a meeting identification number and passcode. If a different attorney or limited scope attorney has been retained to appear, it is the responsibility of the handling attorney to forward the Zoom invitation to the appropriate attendee.

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Counsel may additionally forward the invitation to their own client to allow the client to observe the proceeding. Due to the difficulty, interruption and delay associated with managing multiple remote appearances, the Zoom invitation shall not be forwarded to any other persons. Other individuals who wish to observe a proceeding as a member of the public may also appear remotely upon request.

Cases which are calendared for matters in which a remote appearance is not authorized will not receive a Zoom invitation.

The email used to send the Zoom invitation shall not be used to communicate with the court. Any communications sent to the email address will not be read, answered or forwarded. No documents shall be submitted to the email address. Any effort to make such a communication is considered an impermissible ex parte communication.

c. CONDUCT DURING REMOTE APPEARANCES

Parties are responsible for promptly joining the remote hearing at the scheduled time and date. An invitation start time may or may not correspond with the scheduled hearing date and time based upon other calendared matters.

The chat function may not be utilized by any party during the proceedings. Other than the court, no person may record, video, tape or photograph any portion of the proceeding unless expressly authorized by the assigned judicial officer. The reporter's transcript or statutorily authorized recording shall be the official transcript.

Each participant in a remote court proceeding is expected to conduct himself or herself in the same manner as he or she would if the proceeding were conducted in a public courtroom (i.e. appropriate courtroom attire, no eating or drinking, cell phones switched to silent). Participants shall update their profile name so that it is consistent with the name used in regular court operations and ensure the name listed includes a first and last name.

Participants shall make every effort to reduce or eliminate background noises and distractions that may interfere with the remote court proceedings. In the event that the participation of any individual interferes with the remote court proceeding, intentionally or inadvertently, that participant may be muted, including both audio and video participation, and/or the participant may be removed from the proceeding by being returned to the waiting room or dismissed by the court.

d. PRESENTATION OF EVIDENCE

Documentary or physical evidence may not be presented remotely unless expressly authorized by the assigned judicial officer. Should a party intend to present

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documentary or physical evidence, the party shall cause the exhibits to actually be received by the court and the opposing party or parties no less than 10 calendar days prior to the hearing unless otherwise expressly ordered by the assigned judicial officer. An appointment may be made with the clerk’s office to submit the exhibits. Utilizing the drop-box is strongly discouraged.

Exhibits may not be filed with the court without a cover pleading which includes a caption identifying the parties, the case number and a title of the pleading (i.e. Trial Management Packet, Declaration, List of Exhibits, etc.) and a list that itemizes the attached exhibits. It is the burden of the party presenting evidence at a remote hearing to ensure that the evidence is actually received by the court and the opposing party or parties and attorney(s) in a timely fashion prior to the hearing. The failure to timely submit documentary or physical exhibits for use during any evidentiary proceeding may result in the exclusion of that evidence.

e. INABILITY OR FAILURE TO MAKE APPROPRIATE REMOTE APPEARANCES

Court proceedings are open to the public. By choosing to appear remotely, a participant represents that he or she is proficient in the use of remote technology and shall comply with the rules regarding its use. It is expected that participants shall practice in advance with the Zoom application to ensure familiarity with use of the technology and that the participant’s equipment actually enables the participant to be clearly seen on video and heard via audio. Participants should make plans for a second or redundant system in the event of equipment failure or an internet outage. The court may not delay the proceedings due to a participant’s inability to use Zoom or challenges due to malfunctioning equipment or internet.

f. OPPOSITION TO REMOTE APPEARANCE

Any party opposing the use of a remote appearance by another party may object by using the procedures set forth in the California Rules of Court and filing the appropriate mandatory judicial council form.

19.4 JUVENILE REMOTE APPEARANCES [Reserved]

19.5 TRAFFIC REMOTE APPEARANCES

a. AUTHORIZATION FOR REMOTE APPEARANCES

Remote proceedings may be initiated by any department handling traffic or other infraction matters in the discretion of the judicial officer and as resources permit. Remote proceedings may be utilized in either a physical courtroom or a remote courtroom, and includes, but is not limited to, the use of video, audio, and telephonic

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means for remote appearances; the electronic exchange and authentication of documentary evidence; e-filing and e-service; the use of remote interpreting; and electronic recording to make the official record of an action or proceeding.

b. DEFINITIONS

For the purpose of this rule:

1. "Infraction" means any alleged infraction including, but not limited to, a violation of the Vehicle Code or any local ordinance adopted under the Vehicle Code; state, local or municipal ordinance; or Fish and Game violation, except that the procedures for remote video trials authorized by this rule do not apply to any case in which an informal juvenile and traffic court exercises jurisdiction over a violation under sections 255 and 256 of the Welfare and Institutions Code.
2. "Remote video proceeding" means an arraignment, trial, or related proceeding conducted by two-way electronic audiovisual communication between the defendant, any witnesses, and the court in lieu of the physical presence of both the defendant and any witnesses in the courtroom.
3. "Due date" means the last date on which the defendant's appearance is timely under this rule.

c. COURT COMPLIANCE

Any Solano County Superior Court that conducts remote video proceedings under this rule must comply with the following procedures and use the required forms in this section. In addition to following the standard provisions for processing traffic or other infraction cases, the defendant may request to proceed by remote video proceeding as provided below. The defendant's participation in remote video proceedings is strictly voluntary and shall not be undertaken absent the consent of the defendant.

d. PROCEDURE FOR ARRAIGNMENT

The following procedures apply to a remote video proceeding when the court grants a defendant's request to have an arraignment that is set for a date that is separate from the trial date:

1. The defendant shall review a copy of the Instructions to Defendant for Remote Video Proceeding and agree to the terms (Solano Local Instructions STR-500-INFO.)

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2. To proceed by remote video arraignment, the defendant must sign and file a Notice and Waiver of Rights and Request for Remote Video Proceeding (Solano Local Form STR-510) with the clerk by the appearance date indicated on the Notice to Appear or a continuation of that date granted by the court. The form may be filed electronically or via paper copy.
3. Within ten (10) days of receipt of the Notice and Waiver of Rights and Request for Remote Video Arraignment, and approval by the court, the clerk of the court shall schedule a remote video arraignment. The clerk will thereafter notice the defendant of the remote proceeding as indicated below.
4. To proceed by remote video arraignment, the defendant shall be required to provide a valid e-mail address which will be used by the clerk of the court to provide the approval and notice of the date and time of the remote video proceedings. The clerk shall provide an invitation to the meeting via e-mail, as well as the electronic link to the meeting. The defendant will be required to provide the necessary electronic audiovisual or other communication device for their use during the remote proceedings.
5. On the date and time of the remote video arraignment, the court will initiate the remote proceeding. The defendant will join the meeting as set forth in the instructions form. The defendant's acceptance of the invitation to attend the remote proceeding will be deemed an acknowledgement they have received, reviewed, and expressly consented to the terms of the remote proceeding.

e. PROCEDURE FOR ARRAIGNMENT AND TRIAL

The following procedures apply to a remote video proceeding when the court grants a defendant's request to have an arraignment and trial on the same date:

1. The defendant shall review a copy of the Instructions to Defendant for Remote Video Proceeding and agree to the terms (Solano Local Instructions STR-500-INFO.)
2. To proceed by remote video arraignment and trial, the defendant must sign and file a Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial (Solano Local Form STR-505) with the clerk by the appearance date indicated on the Notice to Appear or a continuation of that date granted by the court. The form may be filed electronically or via paper copy.

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County of Solano**

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3. Within ten (10) days of receipt of the Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial, and approval by the court, the clerk of the court shall enter a not guilty plea on behalf of the defendant and thereafter schedule a remote video trial. The clerk will thereafter notice the defendant of the remote proceeding as indicated below.
4. To proceed by remote video arraignment and trial, the defendant shall be required to provide a valid e-mail address which will be used by the clerk of the court to provide the initial approval and the notice of the date and time of the remote video proceedings. The e-mail address provided shall also be used for the clerk to send an electronic notice for access to the court's secure portal for uploading of exhibits or other documents as set forth in the Instructions to Defendant for Remote Video Proceeding (Solano Local Instructions STR-500-INFO.)
5. At the time of the notice of the remote proceeding, the clerk shall also provide an electronic link for access to the court's secure exhibit portal. Either side may lodge evidence or exhibits via the secure portal, the admissibility of which shall be addressed at the time of the trial. The defendant shall be required to provide the necessary electronic audiovisual or other communication device for their use during the remote proceedings.
6. If the defendant elects to present exhibits or other documents for court consideration, they may do so either in hard copy format or via the court's secure exhibit portal no later than five (5) days prior to the remote proceeding. Written documents submitted via the portal shall be submitted in Adobe Portable Document Format (PDF). Video exhibits submitted via portal shall be submitted in one or more of the following formats: AVI, FLV, WMV, MP4 and MOV. Photographic exhibits submitted via portal shall be in one or more of the following formats: JPEG, PNG, or TIFF. Total file size for all submitted exhibits shall not exceed 50 MB.
7. If the officer or agency issuing the citation elects to present exhibits or other documents for court consideration, they may do so either in hard copy format or via the court's secure exhibit portal no later than five (5) days prior to the remote proceeding. Written documents submitted via the portal shall be submitted in Adobe Portable Document Format (PDF). Video exhibits submitted via portal shall be submitted in one or more of the following formats: AVI, FLV, WMV, MP4 and MOV. Photographic exhibits submitted

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via portal shall be in one or more of the following formats: JPEG, PNG, or TIFF. Total file size for all submitted exhibits shall not exceed 50 MB.

8. On the date and time of the remote trial the court will initiate the remote proceeding. The defendant will join the meeting as set forth in the instructions form. The defendant's acceptance of the invitation to attend the remote proceeding will be deemed an acknowledgement they have received, reviewed, and expressly consented to the terms of the remote proceeding.
9. Either side may, upon request, view any real evidence or exhibits offered by the opposing side. With respect to items lodged through the secure portal the Court may utilize a "breakout room" or similar measure to allow both sides to view the lodged evidence or exhibits.
10. This rule does not prevent or preclude the court from imposing on a defendant who is found guilty any lawful fine, assessment, or other penalty, and the court is not limited to imposing money penalties in the bail amount, unless the bail amount is the maximum and the only lawful penalty. A defendant who is dissatisfied with the judgment in a remote video trial may appeal the judgment under rules 8.901-8.902.

f. PROCEDURE FOR TRIAL

The following procedures apply to a remote video proceeding when the court grants a defendant's request at arraignment to have a trial set for a date that is separate from the date of the arraignment:

1. The defendant shall review a copy of the Instructions to Defendant for Remote Video Proceeding and agree to its terms (Solano Local Instructions STR-500-INFO.)
2. To proceed by remote video trial, the defendant must sign and file a Notice and Waiver of Rights and Request for Remote Video Proceeding (Solano Local Form STR-510) with the clerk by the appearance date indicated on the Notice to Appear or a continuation of that date granted by the court. The form may be filed electronically or via paper copy.
3. Within ten (10) days of receipt of the Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial, and approval by the court, the clerk of the court shall thereafter schedule a remote video trial.

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4. To proceed by remote video arraignment and trial, the defendant shall be required to provide a valid e-mail address which will be used by the clerk of the court to provide the initial approval and the notice of the date and time of the remote video proceedings. The e-mail address provided shall also be used for the clerk to send an electronic notice for access to the court's secure portal for uploading of exhibits or other documents as set forth in the Instructions to Defendant for Remote Video Proceeding (Solano Local Instructions STR-500-INFO.)
5. At the time of the notice of the remote proceeding, the clerk shall also provide an electronic link for access to the court's secure exhibit portal. The defendant will be required to provide the necessary electronic audiovisual or other communication device for their use during the remote proceedings.
6. If the defendant elects to present exhibits or other documents for court consideration, they may do so either in hard copy format or via the court's secure exhibit portal no later than five (5) days prior to the remote proceeding. Written documents submitted via the portal shall be submitted in Adobe Portable Document Format (PDF). Video exhibits submitted via portal shall be submitted in one or more of the following formats: AVI, FLV, WMV, MP4 and MOV. Photographic exhibits submitted via portal shall be in one or more of the following formats: JPEG, PNG, or TIFF. Total file size for all submitted exhibits shall not exceed 50 MB.
7. If the officer or agency issuing the citation elects to present exhibits or other documents for court consideration, they may do so either in hard copy format or via the court's secure exhibit portal no later than five (5) days prior to the remote proceeding. Written documents submitted via the portal shall be submitted in Adobe Portable Document Format (PDF). Video exhibits submitted via portal shall be submitted in one or more of the following formats: AVI, FLV, WMV, MP4 and MOV. Photographic exhibits submitted via portal shall be in one or more of the following formats: JPEG, PNG, or TIFF. Total file size for all submitted exhibits shall not exceed 50 MB.
8. On the date and time of the remote trial the court will initiate the remote proceeding. The defendant will join the meeting as set forth in the instructions form. The defendant's acceptance of the invitation to attend the remote proceeding will be deemed an acknowledgement they have received, reviewed, and expressly consented to the terms of the remote proceeding.

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9. Either side may, upon request, view any real evidence or exhibits offered by the opposing side. With respect to items lodged through the secure portal the Court may utilize a “breakout room” or similar measure to allow both sides to view the lodged evidence or exhibits.

10. This rule does not prevent or preclude the court from imposing on a defendant who is found guilty any lawful fine, assessment, or other penalty, and the court is not limited to imposing money penalties in the bail amount, unless the bail amount is the maximum and the only lawful penalty. A defendant who is dissatisfied with the judgment in a remote video trial may appeal the judgment under rules 8.901-8.902.

g. WITNESSES

On receipt of the defendant's waiver of rights and request to appear for trial as specified above, law enforcement officers and other witnesses will testify remotely and be cross-examined by the defendant remotely. The defendant may offer the testimony of witnesses remotely. Upon good cause shown the court may allow witnesses from either side to appear live in court. Any such decision to allow live witnesses will be made on a case-by-case basis within the sound discretion of the court. The clerk or court will administer the oath to any witness.

h. EXHIBITS

Either side may offer exhibits as if the proceedings were held in open court. It shall be the responsibility of the party offering the exhibit to provide them to the clerk of the court no later than five (5) days prior to the hearing date. Either side may lodge exhibits with the court via the secure exhibit portal or in hard copy format. The court will retain discretion to admit late filed exhibits on good cause shown. If supplied electronically the exhibits shall follow the secure exhibit portal format and procedure as indicated above.

Pursuant to Penal Code section 1417, et seq., exhibits received in hard copy format will be retained pending final resolution of the case, and the return and/or destruction will be pursuant to those provisions. Exhibits transmitted electronically via the secure portal are copies provided to the court and therefore will not be retained following disposition of the case. All electronic exhibits are to be destroyed upon final conclusion of the case, including any and all appellate proceedings.

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i. PROOF OF CORRECTION

If the citation or other charging document alleges one or more correctable offenses, the defendant at arraignment or trial may present proof of correction via video transmission, unless the court requires proof of correction to be submitted in either electronic or paper format. Unless otherwise ordered by the Court, proof of correction may be submitted via the secure portal in the manner set forth in this rule. At the defendant’s request the Court shall take reasonable measures to protect the privacy interests of the defendant when considering evidence offered on a correctable offense. This may include the use of “breakout rooms” or similar measures.

j. PHYSICAL PRESENCE

Nothing in this rule is intended to limit the authority of the court to issue an order requiring the defendant or any witnesses to be physically present in the courtroom in any proceeding or portion of a proceeding if the court finds that circumstances require the physical presence of the defendant or witness in the courtroom.

k. EXTENDING DUE DATE FOR REMOTE VIDEO TRIAL

If the clerk receives the defendant's timely request for a remote video arraignment and trial or remote video trial, and the request is granted, the clerk must, within 10 court days after receiving the defendant's request, extend the appearance date by no less than 25 calendar days and must provide notice to the defendant of the extended due date. Said notice to the defendant may be made by e-mail as provided for above.

l. NOTICE TO ARRESTING OFFICER

If a court grants the defendant's request for a remote video proceeding after receipt of the defendant's Notice and Waiver of Rights and Request for Remote Video arraignment and Trial form or Notice and Waiver of Rights and Request for Remote Video Proceeding form, the clerk must within ten (10) days of receipt deliver electronically a notice of the remote video proceedings to the arresting or citing law enforcement officer, specifying the date and time for the remote video proceedings. The clerk shall also provide an electronic link for access to the court’s secure exhibit portal. The officer and/or law enforcement agency shall be required to provide the necessary electronic audiovisual or other communication device for their use during the remote proceedings

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m. DEFENDANT’S COMPLIANCE

If the defendant fails to comply with this rule, signing and filing all required forms, and complying with all time limits and due dates, the court may deny a request for a remote video proceeding and may proceed as otherwise provided by statute. Defendants will be required to join the remote proceeding promptly and are expected to conduct themselves in the same manner as if the proceeding were conducted in a public courtroom.

n. DISRUPTION TO PROCEEDINGS

All participants shall make all reasonable efforts to reduce or eliminate background noises and distractions. The court retains its discretion to mute a participant and/or terminate a remote video proceeding should there be a violation of these rules or other lawful orders of the court.

o. INELIGIBLE DEFENDANT

If the defendant requests a remote video proceeding and the court determines that the defendant is ineligible, the clerk must extend the due date by no less than 25 calendar days and notify the defendant of the determination and the new due date

p. DUE DATES AND TIME LIMITS

Due dates and time limits must be as stated in this rule, unless extended by the court. The court may extend any date, and the court need not state the reasons for granting or denying an extension on the record or in the minutes.

q. PUBLIC PROCEEDING

Unless otherwise ordered, remote video proceedings under this rule are public proceedings. Members of the public, press/media, professional journalists or other interested persons may request inclusion in a remote video proceeding, including viewing evidence or exhibits offered via the secure portal and viewed by the parties in a “breakout room” or similar measure.

Request to participate should be made at least one (1) day in advance to permit sufficient time to administer the request. Requests to join a remote video proceeding should be submitted by following the directions on the court’s website at

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www.solano.courts.ca.gov. The public may access the traffic or infraction calendar on the court’s website by utilizing the calendar link on the home screen.

r. RECORDINGS PROHIBITED

Remote video proceedings will be recorded electronically by the court and thus shall be the official record of the proceedings. Consistent with Rule 1.150, California Rules of Court, no participant in a remote video proceeding may record, video, tape or photograph any portion of the proceeding absent prior order of the court on good cause shown. Failure to adhere to this rule may subject to the individual to sanctions for contempt of court or other penalties as authorized by law.

(Rule 19.5 adopted effective July 1, 2022).

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APPENDIX

INSTRUCTIONS TO DEFENDANT FOR REMOTE VIDEO PROCEEDING

The Solano County Superior Court is allowing remote video arraignments and trials for traffic infraction cases. (Local Rule 2.150.) RVP are available in almost all adult infraction cases. **IF THE COURT PERMITS REMOTE VIDEO PROCEEDINGS (RVP), YOU MAY BE ABLE TO APPEAR BY AUDIO/VIDEO WITHOUT HAVING TO APPEAR IN PERSON IN COURT.** The procedure does not apply to traffic or other infractions that are filed in Informal Juvenile and Traffic Court. The procedure provides a convenient process for resolving cases with the use of two-way audiovisual communication between you and the court. Defendants who request to appear by RVP must waive (give up) certain rights that apply to trial of criminal offenses, including traffic infractions. The instructions below explain procedures for requesting RVP for traffic infraction cases:

1. **IN ORDER TO PARTICIPATE IN RVP YOU MUST HAVE A VALID, WORKING E-MAIL ADDRESS.** You will be notified of hearing dates and you will receive an electronic link to participate in a Zoom meeting only through e-mail. To request arraignment and trial on the same day, you may file a *Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial* (form STR-505). To request RVP for arraignment or trial on separate days, you may file a *Notice and Waiver of Rights and Request for Remote Video Proceeding* (form STR-510). You will be required to provide your own electronic devices to participate in the Zoom meeting, which can include a telephone, mobile phone, smart phone, laptop or desktop computer with audio and/or video capabilities. If your device does not have video capability you may still participate by audio.
2. **YOU MAY COMPLETE AND SUBMIT THE FORM ONLINE OR FILL OUT THE FORM AND DELIVER IT TO THE COURT.** A completed form must be received by the clerk by the appearance date on the Notice to Appear citation or continuation date granted by the court. If the form is received after the due date the court may require a court appearance or bail deposit to schedule a trial. **Failure to file the form as required by the due date may subject you to other charges, penalties, assessments, and actions, including a civil assessment under Penal Code section 1214.1 of up to \$300 and a hold on your driver's license.**
3. **YOU WILL RECEIVE NOTICE BY E-MAIL.** When the clerk receives a timely request for RVP, the court will rule on the request and notify you through e-mail. If the court denies the request, the court may order you to respond within 10 court days of the notice of the order to schedule an arraignment or trial or appear in court. If the court approves the request, the court will notify you and the officer of the extended date and you will be given an electronic link via your e-mail with instructions on how to join the RVP. Once you join the Zoom meeting you will remain in the "waiting room" until your case is called.
4. **YOU MAY SUBMIT YOUR EXHIBITS ELECTRONICALLY TO THE COURT.** If you receive approval for an arraignment via RVP you may show the court proof of correction for any correctable offenses through your video connection, unless the court requires proof of correction to be submitted in either electronic or paper format. If you receive approval for a trial via RVP you will also be given notice of the electronic link to upload exhibits or other documents via the Court's secure exhibit portal. Electronic exhibits must be submitted to the court no less than five (5) days prior to the trial. If you use the secure portal any written documents must be submitted in Adobe Portable Document Format (PDF). Video exhibits submitted via portal must be submitted in one or more of the following formats: AVI, FLV, WMV, MP4 and MOV. Photographic exhibits submitted via portal must be in one or more of the following formats: JPEG, PNG, or TIFF. The file size for all submitted exhibits shall not exceed 2 GB per file. If you do not use the secure portal, you may provide your exhibits to the court five (5) days before the trial, indicating your name, case or citation number, as well as brief description of what they are.
5. **A NEW TRIAL ("TRIAL DE NOVO") IS NOT ALLOWED UNDER RVP.** After a remote video trial is completed, if you are dissatisfied with the court's judgment, you may file an appeal under California Rules of Court, rules 8.901–8.902 within 30 days of the judgment. A new trial ("trial de novo") is not allowed. Always include your citation number in any correspondence with the court. If you use the secure exhibit portal the court will not keep any exhibits once the case has reached final disposition, including any appellate proceedings. Therefore, at the final conclusion of the case all electronic exhibits will be destroyed. If you submit your exhibits in hard copy format the court will follow the procedure contained in Penal Code section 1417, et seq., concerning exhibits.
6. **IMPORTANT:** You have the right to appear in court for an in-person arraignment without deposit of bail and trial at the court. If you appear in court for your case, your rights include:
 - The right to be represented by an attorney employed by you;
 - The right to request court orders without cost to subpoena and compel the attendance of witnesses and the production of evidence on your behalf;
 - The right to appear in person in court before a judicial officer for an arraignment to be informed of the charges against you, to be advised of your rights, and to enter a plea without deposit of bail;
 - The right to request that a court trial be scheduled without bail for a date that is after your arraignment in court;
 - The right to have a speedy trial;
 - The right to be physically present in court at all stages of the proceedings including, but not limited to, presentation of testimony and evidence and arguments on questions of law at trial and sentencing; and
 - The right to have the witnesses testify under oath in court and to confront and cross-examine witnesses in court.

By voluntarily requesting to appear for arraignment and/or trial by RVP, you will agree to waive (give up):

- Your right to appear in person in court before a judicial officer for arraignment and/or trial;
- Your right to a speedy trial within 45 days; and
- Your right to be physically present in court for trial and sentencing and all stages of the proceedings, including, but not limited to, presentation of testimony and evidence and arguments on questions of law, and confrontation and cross-examination in person of the officer who issued the ticket and other witnesses.

NAME OF COURT: SUPERIOR COURT OF CALIFORNIA, COUNTY OF SOLANO STREET ADDRESS: 600 UNION AVENUE 321 TUOLUMNE STREET MAILING ADDRESS: P.O. BOX 2463 321 TUOLUMNE STREET CITY AND ZIP CODE: FAIRFIELD, CA 94533 VALLEJO, CA 94590 BRANCH NAME: FAIRFIELD BRANCH VALLEJO BRANCH	FOR COURT USE ONLY
PEOPLE OF THE STATE OF CALIFORNIA v. DEFENDANT (Name):	
NOTICE AND WAIVER OF RIGHTS AND REQUEST FOR REMOTE VIDEO ARRAIGNMENT AND TRIAL (Veh. Code, §§ 40901 and 40519(a))	CITATION NUMBER/CASE NUMBER:
	DUE DATE (For Filing Form):

1. Notice to Defendant of Rights

- You have the right to appear in person in court before a judicial officer for arraignment, to be informed of the charges against you, to be advised of your rights, and to enter a plea without deposit of bail.
- You have the right to request at arraignment that a court trial be scheduled for a date after your arraignment.
- You have the right to a speedy trial within 45 days of submitting your request for a trial.
- You have the right to be physically present in court for trial and sentencing and all other stages of the proceedings, including, but not limited to, presentation of testimony and evidence and arguments on questions of law.
- You have the right to have witnesses testify under oath in court and to confront and cross-examine them in court.

2. Waiver of Rights and Request for Remote Video Arraignment and Trial:

a. I, (print name): _____, am the defendant in this traffic infraction case and understand that my rights include those listed above and also the right to hire an attorney and subpoena witnesses. I understand that a remote video proceeding (RVP) uses two-way electronic audiovisual communication between the court and me through my electronic device instead of having me physically appear in the courtroom. By requesting RVP, I agree to have a working e-mail address to receive notices and the electronic link to participate in the RVP. I agree that the court may order me to appear in my case by RVP for any related proceedings. By requesting that the court allow me to proceed without being physically present in the courtroom and to appear for all proceedings by RVP, I voluntarily elect to waive (give up) the following rights:

- My right to appear in person in court on separate days for arraignment without deposit of bail and for trial without deposit of bail unless ordered by the court; INITIALS
- My right to a speedy trial within 45 days; and
- My right to be physically present in the court for trial and sentencing and all other stages of the proceedings, including, but not limited to, presentation of testimony and evidence and arguments on questions of law, and confrontation and cross-examination of witnesses in court.

I have read the *Instructions to Defendant for Remote Video Proceeding* (form STR-500-INFO) and request to appear by RVP in this case. I understand that the court may permit the officer that issued the ticket and any other witnesses to appear in court to testify and be cross-examined while I appear remotely and may deny my request at any time and order me to be present in the courtroom for any proceedings conducted in this case.

- b. I need an interpreter: Yes No (language): _____
- c. I have an attorney to represent me: Yes No (name of attorney): _____
- d. I declare under penalty of perjury under the laws of the State of California that the information I have provided on this form and all attachments is true and correct. I promise to appear for all proceedings ordered by the court in this case. I understand that if I do not appear as promised, the court may forfeit any bail that I posted; hold the trial in my absence; impose a civil assessment of up to \$300 under Penal Code 1214.1, or issue a warrant for my arrest; and report the failure to appear to the Department of Motor Vehicles for a hold on my license.

Date: _____ ▶ _____
DEFENDANT'S SIGNATURE

(Defendant's Phone Number) (Defendant's Street Address/City/State/ZIP) (Defendant's E-mail Address)

Please return this form to the court clerk electronically by clicking the SUBMIT button below or by mail to the Solano Superior Court.

TO BE COMPLETED BY CLERK

Date: _____ Approved by: _____
DEPUTY CLERK

Hearing set for (type of hearing): _____ on (date): _____ at (time): _____

Remote video proceedings to be held via Zoom.

Meeting ID: _____ Password: _____

NAME OF COURT: SUPERIOR COURT OF CALIFORNIA, COUNTY OF SOLANO STREET ADDRESS: 600 UNION AVENUE 321 TUOLUMNE STREET MAILING ADDRESS: P.O. BOX 2463 321 TUOLUMNE STREET CITY AND ZIP CODE: FAIRFIELD, CA 94533 VALLEJO, CA 94590 BRANCH NAME: FAIRFIELD BRANCH VALLEJO BRANCH	FOR COURT USE ONLY
PEOPLE OF THE STATE OF CALIFORNIA v. DEFENDANT (Name):	CITATION NUMBER/CASE NUMBER: DUE DATE (For Form): —
NOTICE AND WAIVER OF RIGHTS AND REQUEST FOR REMOTE VIDEO PROCEEDING (Veh. Code, § 40901)	

1. Notice to Defendant of Rights

- You have the right to appear in person in court before a judicial officer without deposit of bail for an arraignment to be informed of the charges against you, be advised of your rights, enter a plea, and request that a trial be scheduled without deposit of bail.
- You have the right to request with deposit of bail that a trial be scheduled for the same date as your arraignment.
- You have the right to a speedy trial within 45 days of submitting your request for a trial.
- You have the right to be physically present in court for trial and sentencing and all other stages of the proceedings including, but not limited to, presentation of testimony and evidence and arguments on questions of law.
- You have the right to have witnesses testify under oath in court and to confront and cross-examine them in court.

2. Waiver of Rights and Request for Remote Video Arraignment or Trial: _____

a. I, (print name): _____, am the defendant in this traffic infraction case and understand that my rights include those listed above and also the right to hire an attorney and subpoena witnesses. I understand that a remote video proceeding (RVP) uses two-way electronic audiovisual communication between the court and me through my electronic device instead of having me physically appear in the courtroom. By requesting RVP I agree to have a working e-mail address to receive notices and the electronic link to participate in RVP. I agree that the court may order me to appear in my case by RVP for any related proceedings. By requesting that the court allow me to proceed without being physically present in court and appear for all proceedings by RVP, I voluntarily elect to waive (give up) the following rights for (check one) arraignment trial:

INITIALS

- My right to appear for arraignment in person in court before a judicial officer and have a trial on the same day;
- My trial right to a speedy trial within 45 days; and
- My trial right after arraignment to be physically present in the court for trial and sentencing and all other stages of the proceedings, including, but not limited to, presentation of testimony and evidence and arguments on questions of law, and confrontation and cross-examination of witnesses in court.

I have read the *Instructions to Defendant for Remote Video Proceedings* (form STR-500-INFO) and request to appear by RVP in this case. I understand that the court may permit the officer who issued the ticket and any other witnesses to appear in court to testify and be cross-examined while I appear remotely and may deny my request at any time and order me to be present in the courtroom for any proceedings conducted in this case.

b. I need an interpreter: Yes No (language): _____
c. I have an attorney to represent me: Yes No (name of attorney): _____

d. I declare under penalty of perjury under the laws of the State of California that the information I have provided on this form and all attachments is true and correct. I promise to appear for all proceedings ordered by the court in this case. I understand that if I do not appear as promised the court may forfeit any bail that I posted; hold the trial in my absence; impose a civil assessment of up to \$300 under Penal Code 1214.1 or issue a warrant for my arrest; and report the failure to appear to the Department of Motor Vehicles for a hold on my license.

Date: _____ _____
DEFENDANT'S SIGNATURE

(Defendant's Phone Number) (Defendant's Street Address/City/State/ZIP) (Defendant's E-mail Address)

Please return this form to the court clerk electronically by clicking the SUBMIT button below or by mail to the Solano Superior Court.

TO BE COMPLETED BY CLERK

Date: _____ Approved by: _____
DEPUTY CLERK

Hearing set for (type of hearing): _____ on (date): _____ at (time): _____

Remote video proceedings to be held via Zoom.

Meeting ID: _____ Password: _____

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County of Solano**



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7090	Small Claims	Amendment to Claim Prior to Judgment <i>(Small Claims)</i>	March 2000	Optional
3500	Probate	Assessment and Order for Payment	January 2013	Mandatory
322	Family	Application and Order for Publication of Summons	September 2008	Mandatory
3740	Probate	Application to Practice as Minor's Counsel <i>(Guardianship)</i>	July 2008	Mandatory
3500-P	Probate	Assessment and Order for Payment – Probate Code §3100 Petitions	July 2009	Mandatory
397	Family	Attorney's Declaration re: Mediation Video	January 2007	Optional
3490	Probate	Confidential Court Investigator's Information and Referral Form <i>(Guardianship)</i>	January 2010	Mandatory
5000	Adoption	Confidential Court Investigator's Information and Referral Form <i>(Stepparent Adoption)</i>	August 2008	Mandatory
5010	Adoption	Consent of Child to be Adopted <i>(Stepparent Adoption)</i>	August 2008	Mandatory
323	Family	Declaration in Support of Application for Order for Publication of Summons	September 2008	Mandatory
1320	Family	Declaration in Support of Request for Separate Mediation Sessions	June 1998	Optional
3705	Probate	Declaration of Due Diligence <i>(Guardianships and Conservatorships)</i>	July 2009	Optional
7060	Small Claims	Declaration re: Default in Payments and Order Setting Aside Order Providing Payment of Judgment in Installments	November 2000	Optional

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5006	Family	Declaration re: Notice Upon Application for Emergency Orders	July 2014	Optional
1070	Family	Declaration re: Notice Upon Ex Parte Application for Orders	December 2006	Mandatory
1070-G	Probate	Declaration re: Notice Upon Ex Parte Application for Orders (<i>Guardianship</i>)	July 2008	Mandatory
3700	Probate	Declaration re: Venue (<i>Guardianships</i>)	July 2008	Optional
4899-TR	Traffic	Election for Traffic School	January 2015	Mandatory
3710	Probate	Ex Parte Application to Waive or Shorten Notice of Hearing on Temporary Guardianship or Conservatorship; Order re: Notice	January 2013	Optional
5005-FL	Family	Family Law Ex Parte Instructions	July 2022	N/A
392	Family	Form of Papers	April 2007	N/A
500-STR	Traffic	Instructions to Defendant for Remote Video Proceedings	July 2022	N/A
165	Civil	Judgment (Default by Clerk)	September 1998	Optional
166	Civil	Judgment (Default by Court)	December 2007	Optional
168	Civil	Judgment (Trial)	October 2000	Optional
7000	Small Claims	Judgment Debtor's Statement re: Request to Enter Satisfaction of Judgment	November 2000	Optional
010	Family	Meet and Confer Orders	March 2008	Mandatory
505-STR	Traffic	Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial (Vehicle Code §§ 40901 and 40519(a))	July 2022	Mandatory

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510-STR	Traffic	Notice and Waiver of Rights and Request for Remote Video Proceeding (Vehicle Code § 40901)	July 2022	Mandatory
5113	Family	Notice of Case Management Conferences and Assignment of Judicial Officer for All Purposes	July 2018	Mandatory
900-CV	Civil	Notice of Case Management Conference One and Notice of Assignment of Judge for All Purposes	January 2017	Mandatory
399	Family	Notice of Continued Hearing	April 2007	Optional
4803-TR	Traffic	Notice of Rights	January 2015	Mandatory
7010-PR	Probate	Objections to a Guardianship	January 2017	Optional
7009-PR	Probate	Objection to Appointment of Guardian	January 2017	Optional
300	Family	Order After Hearing / Stipulation and Order	December 2006	Optional
320	Family	Order Appointing Counsel for Minors	November 2000	Optional
3510	Probate	Order Appointing Court Investigator (Guardianships)	July 2008	Mandatory
3515	Probate	Order Appointing Investigator and Notice of Investigation of Costs	July 2009	Mandatory
309	Probate	Order Appointing Regional Center to Evaluate Proposed Ward or Conservatee	July 2008	Mandatory
345	Family	Order re: Testing for Alcohol or Illegal Use of Controlled Substances	July 2008	Mandatory
304	Family	Parenting Orders Attachment	September 2007	Optional

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3720	Probate	Petition for Visitation Orders	July 2009	Optional
7500	Probate	Placement and Level of Care Assessment for Conservatee (Probate Code §2352.5)	January 2010	Mandatory
6025	Juvenile	Pre-Screen Financial Declaration (<i>Juvenile Dependency</i>)	July 2013	Mandatory
3800	Probate	Preliminary Inventory of Guardianship Estate	July 2008	Mandatory
3015-CV	Civil	Response to Petition re: Disposition of Weapons; Notice of Hearing	July 2015	Optional
6011-JV	Juvenile	Request and Order for Appointment of Court Appointed Special Advocate (CASA)	January 2015	Mandatory
910	Civil	Request for Extension of Time (re: Proof of Service of Summons)	December 2000	Optional
920	Civil	Request for Extension of Time (re: Filing Response)	December 2000	Optional
3011-CV	Civil Family	Request for Informal Discovery Conference	January 2019	Optional
7023	Small Claims	Request for Dismissal	September 1999	Optional
333-INT	All	Request for Interpreter	July 2015	Mandatory
1325	Family	Request for Separate Mediation or Support Person	June 1998	Optional
890	Family	Status Conference Report – Family Law (Marriage / RDP)	July 2023	Mandatory (blue paper)
890-UPA	Family	Status Conference Report – Family Law (Uniform Parentage Act)	July 2009	Mandatory (blue paper)

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303	Family	Stipulation and Order re: Partial Child Custody Evaluation	March 2000	Optional
306	Family	Supervised Visitation / Supervised Exchange Order	August 2002	Optional
314	Family	Time Sharing Arrangement Table	October 2007	Optional
7020	Probate	Verification of Viewing of Conservatorship Video	July 2011	Mandatory
258(a)-CR	Criminal	Waiver and Plea to Driving Under the Influence (No Priors)	July 2015	Optional
258(b)-CR	Criminal	Waiver and Plea to Driving Under the Influence (One Prior)	July 2015	Optional
258(c)-CR	Criminal	Waiver and Plea to Driving Under the Influence (Two Priors)	July 2015	Optional
7001-PR	Probate	Waiver of Accounting	January 2019	Optional
145-CR	Criminal	Waiver of Constitutional Rights in Support of Defendant's Motion to Change Plea (Misdemeanor)	July 2015	Optional
545-CR	Criminal	Waiver of Rights (Felony)	July 2014	Optional
555-CR	Criminal	Waiver of Rights (Violation)	July 2014	Optional
145-CR	Criminal	Waiver of Constitutional Rights in Support of Defendant's Motion to Change Plea (Misdemeanor)	July 2015	Optional

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010	Family	Meet and Confer Orders	March 2008	Mandatory
145-CR	Criminal	Waiver of Constitutional Rights in Support of Defendant's Motion to Change Plea (Misdemeanor)	July 2015	Optional
165	Civil	Judgment (Default by Clerk)	September 1998	Optional
166	Civil	Judgment (Default by Court)	December 2007	Optional
168	Civil	Judgment (Trial)	October 2000	Optional
258(a)-CR	Criminal	Waiver and Plea to Driving Under the Influence (No Priors)	July 2015	Optional
258(b)-CR	Criminal	Waiver and Plea to Driving Under the Influence (One Prior)	July 2015	Optional
258(c)-CR	Criminal	Waiver and Plea to Driving Under the Influence (Two Priors)	July 2015	Optional
300	Family	Order After Hearing / Stipulation and Order	December 2006	Optional
303	Family	Stipulation and Order re: Partial Child Custody Evaluation	March 2000	Optional
304	Family	Parenting Orders Attachment	September 2007	Optional
306	Family	Supervised Visitation / Supervised Exchange Order	August 2002	Optional
309	Probate	Order Appointing Regional Center to Evaluate Proposed Ward or Conservatee	July 2008	Mandatory
314	Family	Time Sharing Arrangement Table	October 2007	Optional
320	Family	Order Appointing Counsel for Minors	November 2000	Optional
322	Family	Application / Order for Publication of Summons	September 2008	Mandatory
323	Family	Declaration in Support of Application for Order for Publication of Summons	September 2008	Mandatory

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323	Family	Declaration in Support of Application for Order for Publication of Summons	September 2008	Mandatory
333-INT	All	Request for Interpreter	July 2015	Mandatory
345	Family	Order re: Testing for Alcohol or Illegal Use of Controlled Substances	July 2008	Mandatory
392	Family	Form of Papers	April 2007	N/A
397	Family	Attorney's Declaration re: Mediation Video	January 2007	Optional
399	Family	Notice of Continued Hearing	April 2007	Optional
500-STR	Traffic	Instructions to Defendant for Remote Video Proceedings	July 2022	N/A
505-STR	Traffic	Notice and Waiver of Rights and Request for Remote Video Arraignment and Trial (Vehicle Code §§ 40901 and 40519(a))	July 2022	Mandatory
510-STR	Traffic	Notice and Waiver of Rights and Request for Remote Video Proceeding (Vehicle Code § 40901)	July 2022	Mandatory
545-CR	Criminal	Waiver of Rights (Felony)	July 2014	Optional
555-CR	Criminal	Waiver of Rights (Violation)	July 2014	Optional
890	Family	Status Conference Report – Family Law (Marriage / RDP)	July 2023	Mandatory (blue paper)
890-UPA	Family	Status Conference Report – Family Law (Uniform Parentage Act)	July 2009	Mandatory (blue paper)
900-CV	Civil	Notice of Case Management Conference One and Notice of Assignment of Judge for All Purposes	January 2017	Mandatory

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910	Civil	Request for Extension of Time (re: Proof of Service of Summons)	December 2000	Optional
920	Civil	Request for Extension of Time (re: Filing Response)	December 2000	Optional
1070	Family	Declaration re: Notice Upon Ex Parte Application for Orders	December 2006	Mandatory
1070-G	Probate	Declaration re Notice Upon Ex Parte Application for Orders (<i>Guardianship</i>)	July 2008	Mandatory
1320	Family	Declaration in Support of Request for Separate Mediation Sessions	June 1998	Optional
1325	Family	Request for Separate Mediation or Support Person	June 1998	Optional
3011-CV	Civil Family Probate	Request for Informal Discovery Conference	January 2019	Optional
3015-CV	Civil	Response to Petition re: Disposition of Weapons; Notice of Hearing	July 2015	Optional
3455	Probate	Objection to Appointment of Guardian	January 2007	Mandatory
3490	Probate	Confidential Court Investigator's Information and Referral Form (<i>Guardianship</i>)	January 2010	Mandatory
3500	Probate	Assessment and Order for Payment	January 2013	Mandatory
3500-P	Probate	Assessment and Order for Payment – Probate Code §3100 Petitions	July 2009	Mandatory
3510	Probate	Order Appointing Court Investigator (<i>Guardianships</i>)	July 2008	Mandatory
3515	Probate	Order Appointing Investigator and Notice of Investigation Costs	July 2009	Mandatory

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3700	Probate	Declaration re: Venue (<i>Guardianships</i>)	July 2008	Optional
3705	Probate	Declaration of Due Diligence (<i>Guardianships and Conservatorships</i>)	July 2009	Optional
3710	Probate	Ex Parte Application to Waive or Shorten Notice of Hearing on Temporary Guardianship or Conservatorship; Order re: Notice	January 2013	Optional
3720	Probate	Petition for Visitation Orders	July 2009	Optional
3740	Probate	Application to Practice as Minor's Counsel (<i>Guardianship</i>)	July 2008	Mandatory
3800	Probate	Preliminary Inventory of Guardianship Estate	July 2008	Mandatory
4803-TR	Traffic	Notice of Rights	January 2015	Mandatory
4899-TR	Traffic	Election for Traffic School	January 2015	Mandatory
5000	Adoption	Confidential Court Investigator's Information and Referral Form (<i>Stepparent Adoption</i>)	August 2008	Mandatory
5005-FL	Family	Family Law Ex Parte Instructions	July 2022	N/A
5006	Family	Declaration re: Notice Upon Application for Emergency Orders	July 2014	Optional
5010	Adoption	Consent of Child to be Adopted (<i>Stepparent Adoption</i>)	August 2008	Mandatory
5113	Family	Notice of Case Management Conferences and Assignment of Judicial Officer for All Purposes	July 2018	Mandatory
6011-JV	Juvenile	Request and Order for Appointment of Court Appointed Special Advocate (CASA)	January 2015	Mandatory
6025	Juvenile	Pre-Screen Financial Declaration (<i>Juvenile Dependency</i>)	July 2013	Mandatory

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7000	Small Claims	Judgment Debtor's Statement re: Request to Enter Satisfaction of Judgment	November 2000	Optional
7001-PR	Probate	Waiver of Accounting	January 2019	Optional
7009-PR	Probate	Objection to Appointment of Guardian	January 2017	Optional
7010-PR	Probate	Objections to a Guardianship	January 2017	Optional
7020	Probate	Verification of Viewing of Conservatorship Video	July 2011	Mandatory
7023	Small Claims	Request for Dismissal	September 1999	Optional
7060	Small Claims	Declaration re: Default in Payments and Order Setting Aside Order Providing Payment of Judgment in Installments	November 2000	Optional
7090	Small Claims	Amendment to Claim Prior to Judgment <i>(Small Claims)</i>	March 2000	Optional
7500	Probate	Placement and Level of Care Assessment for Conservatee (Probate Code §2352.5)	January 2010	Mandatory

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