

**California Attorney
Guidelines of Civility and Professionalism**

**The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639**

**Adopted by the Board of Governors on
July 20, 2007**

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**CALIFORNIA ATTORNEY
GUIDELINES OF CIVILITY AND PROFESSIONALISM
(Adopted July 20, 2007)**

INTRODUCTION

As officers of the court with responsibilities to the administration of justice, attorneys have an obligation to be professional with clients, other parties and counsel, the courts and the public. This obligation includes civility, professional integrity, personal dignity, candor, diligence, respect, courtesy, and cooperation, all of which are essential to the fair administration of justice and conflict resolution.

These are guidelines for civility. The Guidelines are offered because civility in the practice of law promotes both the effectiveness and the enjoyment of the practice and economical client representation. The legal profession must strive for the highest standards of attorney behavior to elevate and enhance our service to justice. Uncivil or unprofessional conduct not only disserves the individual involved, it demeans the profession as a whole and our system of justice.

These voluntary Guidelines foster a level of civility and professionalism that exceed the minimum requirements of the mandated Rules of Professional Conduct as the best practices of civility in the practice of law in California. The Guidelines are not intended to supplant these or any other rules or laws that govern attorney conduct. Since the Guidelines are not mandatory rules of professional conduct, nor rules of practice, nor standards of care, they are not to be used as an independent basis for disciplinary charges by the State Bar or claims of professional negligence.

The Guidelines are intended to complement codes of professionalism adopted by bar associations in California. Individual attorneys are encouraged to make these guidelines their personal standards by taking the pledge that appears at the end. The Guidelines can be applicable to all lawyers regardless of practice area. Attorneys are encouraged to comply with both the spirit and letter of these guidelines, recognizing that complying with these guidelines does not in any way denigrate the attorney's duty of zealous representation.

**SECTION 1
RESPONSIBILITIES TO THE JUSTICE SYSTEM**

The dignity, decorum and courtesy that have traditionally characterized the courts and legal profession of civilized nations are not empty formalities. They are essential to an atmosphere that promotes justice and to an attorney's responsibility for the fair and impartial administration of justice.

**SECTION 2
RESPONSIBILITIES TO THE PUBLIC AND THE PROFESSION**

An attorney should be mindful that, as individual circumstances permit, the goals of the profession include improving the administration of justice and contributing time to persons and organizations that cannot afford legal assistance.

An attorney should encourage new members of the bar to adopt these guidelines of civility and professionalism and mentor them in applying the guidelines.

**SECTION 3
RESPONSIBILITIES TO THE CLIENT AND CLIENT REPRESENTATION**

An attorney should treat clients with courtesy and respect, and represent them in a civil and professional manner. An attorney should advise current and potential clients that it is not acceptable for an attorney to engage in abusive behavior or other conduct unbecoming a member of the bar and an officer of the court.

As an officer of the court, an attorney should not allow clients to prevail upon the attorney to engage in uncivil behavior.

An attorney should not compromise the guidelines of civility and professionalism to achieve an advantage.

SECTION 4 COMMUNICATIONS

An attorney's communications about the legal system should at all times reflect civility, professional integrity, personal dignity, and respect for the legal system. An attorney should not engage in conduct that is unbecoming a member of the Bar and an officer of the court.

For example, in communications about the legal system and with adversaries:

- a. An attorney's conduct should be consistent with high respect and esteem for the civil and criminal justice systems.
- b. This guideline does not prohibit an attorney's good faith expression of dissent or criticism made in public or private discussions for the purpose of improving the legal system or profession.
- c. An attorney should not disparage the intelligence, integrity, ethics, morals or behavior of the court or other counsel, parties or participants when those characteristics are not at issue.
- d. Respecting cultural diversity, an attorney should not disparage another's personal characteristics.
- e. An attorney should not make exaggerated, false, or misleading statements to the media while representing a party in a pending matter.
- f. An attorney should avoid hostile, demeaning or humiliating words.
- g. An attorney should not create a false or misleading record of events or attribute to an opposing counsel a position not taken.
- h. An attorney should agree to reasonable requests in the interests of efficiency and economy, including agreeing to a waiver of procedural formalities where appropriate.
- i. Unless specifically permitted or invited by the court or authorized by law, an attorney should not correspond directly with the court regarding a case.

Nothing above shall be construed as discouraging the reporting of conduct that fails to comply with the Rules of Professional Conduct.

SECTION 5 PUNCTUALITY

An attorney should be punctual in appearing at trials, hearings, meetings, depositions and other scheduled appearances.

For example:

- a. An attorney should arrive sufficiently in advance to resolve preliminary matters.
- b. An attorney should timely notify participants when the attorney will be late or is aware that a participant will be late.

SECTION 6 SCHEDULING, CONTINUANCES AND EXTENSIONS OF TIME

An attorney should advise clients that civility and courtesy in scheduling meetings, hearings and discovery are expected as professional conduct.

For example:

- a. An attorney should consider the scheduling interests of the court, other counsel or party, and other participants, should schedule by agreement whenever possible, and should send formal notice after agreement is reached.
- b. An attorney should not arbitrarily or unreasonably withhold consent to a request for scheduling accommodations or engage in delay tactics.
- c. An attorney should promptly notify the court and other counsel of problems with key participants' availability.
- d. An attorney should promptly notify other counsel and, if appropriate, the court, when scheduled meetings, hearings or depositions must be cancelled or rescheduled, and provide alternate dates when possible.

In considering requests for an extension of time, an attorney should consider the client's interests and need to promptly resolve matters, the schedules and willingness of others to grant reciprocal extensions, the time needed for a task, and other relevant factors.

Consistent with existing law and court orders, an attorney should agree to reasonable requests for extensions of time that are not adverse to a client's interests.

For example:

- a. Unless time is of the essence, an attorney should agree to an extension without requiring motions or other formalities, regardless of whether the requesting counsel previously refused to grant an extension.
- b. An attorney should agree to an appropriate continuance when new counsel substitutes in.
- c. An attorney should advise clients that failing to agree with reasonable requests for time extensions is inappropriate.
- d. An attorney should not use extensions or continuances for harassment or to extend litigation.
- e. An attorney should place conditions on an agreement to an extension only if they are fair and essential or if the attorney is entitled to impose them, for instance to preserve rights or seek reciprocal scheduling concessions.
- f. If an attorney intends that a request for or agreement to an extension shall cut off a party's substantive rights or procedural options, the attorney should disclose that intent at the time of the request or agreement.

SECTION 7 SERVICE OF PAPERS

The timing and manner of service of papers should not be used to the disadvantage of the party receiving the papers.

For example:

- a. An attorney should serve papers on the attorney who is responsible for the matter at his or her principal place of work.
- b. If possible, papers should be served upon counsel at a time agreed upon in advance.
- c. When serving papers, an attorney should allow sufficient time for opposing counsel to prepare for a court appearance or to respond to the papers.

- d. An attorney should not serve papers to take advantage of an opponent's absence or to inconvenience the opponent, for instance by serving papers late on Friday afternoon or the day preceding a holiday.
- e. When it is likely that service by mail will prejudice an opposing party, an attorney should serve the papers by other permissible means.

**SECTION 8
WRITINGS SUBMITTED TO THE COURT, COUNSEL OR OTHER PARTIES**

Written materials directed to counsel, third parties or a court should be factual and concise and focused on the issue to be decided.

For example:

- a. An attorney should not make ad hominem attacks on opposing counsel.
- b. Unless at issue or relevant in a particular proceeding, an attorney should avoid degrading the intelligence, ethics, morals, integrity, or personal behavior of others.
- c. An attorney should clearly identify all revisions in a document previously submitted to the court or other counsel.

**SECTION 9
DISCOVERY**

Attorneys are encouraged to meet and confer early in order to explore voluntary disclosure, which includes identification of issues, identification of persons with knowledge of such issues, and exchange of documents.

Attorneys are encouraged to propound and respond to formal discovery in a manner designed to fully implement the purposes of the Civil Discovery Act.

An attorney should not use discovery to harass an opposing counsel, parties, or witnesses. An attorney should not use discovery to delay the resolution of a dispute.

For example:

- a. As to Depositions:
 - 1. When another party notices a deposition for the near future, absent unusual circumstances, an attorney should not schedule another deposition in the same case for an earlier date without opposing counsel's agreement.
 - 2. An attorney should delay a scheduled deposition only when necessary to address scheduling problems and not in bad faith.
 - 3. An attorney should treat other counsel and participants with courtesy and civility, and should not engage in conduct that would be inappropriate in the presence of a judicial officer.
 - 4. An attorney should remember that vigorous advocacy can be consistent with professional courtesy, and that arguments or conflicts with other counsel should not be personal.
 - 5. An attorney questioning a deponent should provide other counsel present with a copy of any documents shown to the deponent before or contemporaneously with showing the document to the deponent.
 - 6. Once a question is asked, an attorney should not interrupt a deposition or make an objection for the purpose of coaching a deponent or suggesting answers.

7. An attorney should not direct a deponent to refuse to answer a question or end the deposition without a legal basis for doing so.
 8. An attorney should refrain from self-serving speeches and speaking objections.
- b. As to Document Demands:
1. Document requests should be used only to seek those documents that are reasonably needed to prosecute or defend an action.
 2. An attorney should not make demands to harass or embarrass a party or witness or to impose an inordinate burden or expense in responding.
 3. If an attorney inadvertently receives a privileged document, the attorney should promptly notify the producing party that the document has been received.
 4. In responding to a document demand, an attorney should not intentionally misconstrue a request in such a way as to avoid disclosure or withhold a document on the grounds of privilege.
 5. An attorney should not produce disorganized or unintelligible documents, or produce documents in a way that hides or obscures the existence of particular documents.
 6. An attorney should not delay in producing a document in order to prevent opposing counsel from inspecting the document prior to or during a scheduled deposition or for some other tactical reason.
- c. As to Interrogatories:
1. An attorney should narrowly tailor special interrogatories and not use them to harass or impose an undue burden or expense on an opposing party.
 2. An attorney should not intentionally misconstrue or respond to interrogatories in a manner that is not truly responsive.
 3. When an attorney lacks a good faith belief in the merit of an objection, the attorney should not object to an interrogatory. If an interrogatory is objectionable in part, an attorney should answer the unobjectionable part.

SECTION 10 MOTION PRACTICE

An attorney should consider whether, before filing or pursuing a motion, to contact opposing counsel to attempt to informally resolve or limit the dispute.

For example:

- a. Before filing demurrers, motions to strike, motions to transfer venue, and motions for judgment on the pleadings, an attorney should engage in more than a pro forma effort to resolve the issue.
- b. In complying with any meet and confer requirement in the California Code of Civil Procedure, an attorney should speak personally with opposing counsel and engage in a good faith effort to resolve or informally limit an issue.
- c. An attorney should not engage in conduct that forces an opposing counsel to file a motion and then not oppose the motion.
- d. An attorney who has no reasonable objection to a proposed motion should promptly make this position known to opposing counsel, who then may file an unopposed motion or avoid filing a motion.

e. After opposing a motion, if an attorney recognizes that the movant's position is correct, the attorney should promptly advise the movant and the court of this change in position.

f. Because requests for monetary sanctions, even if statutorily authorized, can lead to the destruction of a productive relationship between counsel or parties, monetary sanctions should not be sought unless fully justified by the circumstances and necessary to protect a client's legitimate interests and then only after a good faith effort to resolve the issue informally among counsel.

SECTION 11 DEALING WITH NONPARTY WITNESSES

It is important to promote high regard for the profession and the legal system among those who are neither attorneys nor litigants. An attorney's conduct in dealings with nonparty witnesses should exhibit the highest standards of civility.

For example:

a. An attorney should be courteous and respectful in communications with nonparty witnesses.

b. Upon request, an attorney should extend professional courtesies and grant reasonable accommodations, unless to do so would materially prejudice the client's lawful objectives.

c. An attorney should take special care to protect a witness from undue harassment or embarrassment and to state questions in a form that is appropriate to the witness's age and development.

d. An attorney should not issue a subpoena to a nonparty witness for inappropriate tactical or strategic purposes, such as to intimidate or harass the nonparty.

e. As soon as an attorney knows that a previously scheduled deposition will or will not, in fact, go forward as scheduled, the attorney should notify all counsel.

f. An attorney who obtains a document pursuant to a deposition subpoena should, upon request, make copies of the document available to all other counsel at their expense.

SECTION 12 EX PARTE COMMUNICATION WITH THE COURT

In a social setting or otherwise, an attorney should not communicate ex parte with a judicial officer on the substance of a case pending before the court, unless permitted by law.

SECTION 13 SETTLEMENT AND ALTERNATIVE DISPUTE RESOLUTION

An attorney should raise and explore with the client and, if the client consents, with opposing counsel, the possibility of settlement and alternative dispute resolution in every matter as soon as possible and, when appropriate, during the course of litigation.

For example:

An attorney should advise a client at the outset of the relationship of the availability of informal or alternative dispute resolution.

a. An attorney should attempt to evaluate a matter objectively and to de-escalate any controversy or dispute in an effort to resolve or limit the controversy or dispute.

b. An attorney should consider whether alternative dispute resolution would adequately serve a client's interest and dispose of the controversy expeditiously and economically.

c. An attorney should honor a client's desire to settle the dispute quickly and in a cost-effective manner.

- d. An attorney should use an alternative dispute resolution process for purposes of settlement and not for delay or other improper purposes, such as discovery.
- e. An attorney should participate in good faith, and assist the alternative dispute officer by providing pertinent and accurate facts, law, theories, opinions and arguments in an attempt to resolve a dispute.
- f. An attorney should not falsely hold out the possibility of settlement as a means for terminating discovery or delaying trial.

SECTION 14 CONDUCT IN COURT

To promote a positive image of the profession, an attorney should always act respectfully and with dignity in court and assist the court in proper handling of a case.

For example:

- a. An attorney should be punctual and prepared.
- b. An attorney's conduct should avoid disorder or disruption and preserve the right to a fair trial.
- c. An attorney should maintain respect for and confidence in a judicial office by displaying courtesy, dignity and respect toward the court and courtroom personnel.
- d. An attorney should refrain from conduct that inappropriately demeans another person.
- e. Before appearing in court, an attorney should advise a client of the kind of behavior expected of the client and endeavor to prevent the client from creating disorder or disruption in the courtroom.
- f. An attorney should make objections for legitimate and good faith reasons, and not for the purpose of harassment or delay.
- g. An attorney should honor an opposing counsel's requests that do not materially prejudice the rights of the attorney's client or sacrifice tactical advantage.
- h. While appearing before the court, an attorney should address all arguments, objections and requests to the court, rather than directly to opposing counsel.
- i. While appearing in court, an attorney should demonstrate sensitivity to any party, witness or attorney who has requested, or may need, accommodation as a person with physical or mental impairment, so as to foster full and fair access of all persons to the court.

SECTION 15 DEFAULT

An attorney should not take the default of an opposing party known to be represented by counsel without giving the party advance warning.

For example an attorney should not race opposing counsel to the courthouse to knowingly enter a default before a responsive pleading can be filed. This guideline is intended to apply only to taking a default when there is a failure to timely respond to complaints, cross-complaints, and amended pleadings.

SECTION 16
SOCIAL RELATIONSHIPS WITH JUDICIAL OFFICERS, NEUTRALS AND
COURT APPOINTED EXPERTS

An attorney should avoid even the appearance of bias by notifying opposing counsel or an unrepresented opposing party of any close, personal relationships between the attorney and a judicial officer, arbitrator, mediator or court-appointed expert and allowing a reasonable opportunity to object.

SECTION 17
PRIVACY

An attorney should respect the privacy rights of parties and nonparties.

For Example:

- a. An attorney should not inquire into, attempt or threaten to use, private facts concerning any party or other individuals for the purpose of gaining an advantage in a case. This guideline does not preclude inquiry into sensitive matters relevant to an issue, as long as the inquiry is pursued as narrowly as possible.
- b. If an attorney must inquire into an individual's private affairs, the attorney should cooperate in arranging for protective measures, including stipulating to an appropriate protective order, designed to assure that the information revealed is disclosed only for purposes relevant to the pending litigation.
- c. Nothing herein shall be construed as authorizing the withholding of information in violation of applicable law.

SECTION 18
NEGOTIATION OF WRITTEN AGREEMENTS

An attorney should negotiate and conclude written agreements in a cooperative manner and with informed authority of the client.

For example:

- a. An attorney should use boilerplate provisions only if they apply to the subject of the agreement.
- b. If an attorney modifies a document, the attorney should clearly identify the change and bring it to the attention of other counsel.
- c. An attorney should avoid negotiating tactics that are abusive; that are not made in good faith; that threaten inappropriate legal action; that are not true; that set arbitrary deadlines; that are intended solely to gain an unfair advantage or take unfair advantage of a superior bargaining position; or that do not accurately reflect the client's wishes or previous oral agreements.
- d. An attorney should not participate in an action or the preparation of a document that is intended to circumvent or violate applicable laws or rules.

In addition to other applicable Sections of these Guidelines, attorneys engaged in a transactional practice have unique responsibilities because much of the practice is conducted without judicial supervision.

For example:

- a. Attorneys should be mindful that their primary goals are to negotiate in a manner that accurately represents their client and the purpose for which they were retained.
- b. Attorneys should successfully and timely conclude a transaction in a manner that accurately represents the parties' intentions and has the least likely potential for litigation.

- c. With client approval, attorneys should consider giving each party permission to contact the employees of the other party for the purpose of promptly and efficiently obtaining necessary information and documents.

**SECTION 19
ADDITIONAL PROVISION FOR FAMILY LAW PRACTITIONERS**

In addition to other applicable Sections of these Guidelines, in family law proceedings an attorney should seek to reduce emotional tension and trauma and encourage the parties and attorneys to interact in a cooperative atmosphere, and keep the best interest of the children in mind.

For example:

- a. An attorney should discourage and should not abet vindictive conduct.
- b. An attorney should treat all participants with courtesy and respect in order to minimize the emotional intensity of a family dispute.
- c. An attorney representing a parent should consider the welfare of a minor child and seek to minimize the adverse impact of the family law proceeding on the child.

**SECTION 20
ADDITIONAL PROVISION FOR CRIMINAL LAW PRACTITIONERS**

In addition to other applicable Sections of these Guidelines, criminal law practitioners have unique responsibilities. Prosecutors are charged with seeking justice, while defenders must zealously represent their clients even in the face of seemingly overwhelming evidence of guilt. In practicing criminal law, an attorney should appreciate these roles.

For example:

- a. A prosecutor should not question the propriety of defending a person accused of a crime.
- b. Appellate counsel and trial counsel should communicate openly, civilly and without rancor, endeavoring to keep the proceedings on a professional level.

**SECTION 21
COURT PROCEEDINGS**

Judges are encouraged to become familiar with these Guidelines and to support and promote them where appropriate in court proceedings.

ATTORNEY'S PLEDGE

I commit to these Guidelines of Civility and Professionalism and will be guided by a sense of integrity, cooperation and fair play.

I will abstain from rude, disruptive, disrespectful, and abusive behavior, and will act with dignity, decency, courtesy, and candor with opposing counsel, the courts and the public.

As part of my responsibility for the fair administration of justice, I will inform my clients of this commitment and, in an effort to help promote the responsible practice of law, I will encourage other attorneys to observe these Guidelines.

(Signature)

(Date)

(Print Name)

(Abbreviated Without Examples)

**The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639
Adopted by the Board of Governors on
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**California Attorney Guidelines of Civility and Professionalism
(Abbreviated, adopted July 20, 2007)**

INTRODUCTION. As officers of the court with responsibilities to the administration of justice, attorneys have an obligation to be professional with clients, other parties and counsel, the courts and the public. This obligation includes civility, professional integrity, personal dignity, candor, diligence, respect, courtesy, and cooperation, all of which are essential to the fair administration of justice and conflict resolution.

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SECTION 3. An attorney should treat clients with courtesy and respect, and represent them in a civil and professional manner. An attorney should advise current and potential clients that it is not acceptable for an attorney to engage in abusive behavior or other conduct unbecoming a member of the bar and an officer of the court.

As an officer of the court, an attorney should not allow clients to prevail upon the attorney to engage in uncivil behavior. An attorney should not compromise the guidelines of civility and professionalism to achieve an advantage.

SECTION 4. An attorney's communications about the legal system should at all times reflect civility, professional integrity, personal dignity, and respect for the legal system. An attorney should not engage in conduct that is unbecoming a member of the Bar and an officer of the court.

Nothing above shall be construed as discouraging the reporting of conduct that fails to comply with the Rules of Professional Conduct.

SECTION 5. An attorney should be punctual in appearing at trials, hearings, meetings, depositions and other scheduled appearances.

SECTION 6. An attorney should advise clients that civility and courtesy in scheduling meetings, hearings and discovery are expected as professional conduct.

In considering requests for an extension of time, an attorney should consider the client's interests and need to promptly resolve matters, the schedules and willingness of others to grant reciprocal extensions, the time needed for a task, and other relevant factors.

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SECTION 8. Written materials directed to counsel, third parties or a court should be factual and concise and focused on the issue to be decided.

SECTION 9. Attorneys are encouraged to meet and confer early in order to explore voluntary disclosure, which includes identification of issues, identification of persons with knowledge of such issues, and exchange of documents.

Attorneys are encouraged to propound and respond to formal discovery in a manner designed to fully implement the purposes of the California Discovery Act.

An attorney should not use discovery to harass an opposing counsel, parties or witnesses. An attorney should not use discovery to delay the resolution of a dispute.

SECTION 10. An attorney should consider whether, before filing or pursuing a motion, to contact opposing counsel to attempt to informally resolve or limit the dispute.

SECTION 11. It is important to promote high regard for the profession and the legal system among those who are neither attorneys nor litigants. An attorney's conduct in dealings with nonparty witnesses should exhibit the highest standards of civility.

SECTION 12. In a social setting or otherwise, an attorney should not communicate ex parte with a judicial officer on the substance of a case pending before the court, unless permitted by law.

SECTION 13. An attorney should raise and explore with the client and, if the client consents, with opposing counsel, the possibility of settlement and alternative dispute resolution in every case as soon possible and, when appropriate, during the course of litigation.

SECTION 14. To promote a positive image of the profession, an attorney should always act respectfully and with dignity in court and assist the court in proper handling of a case.

SECTION 15. An attorney should not take the default of an opposing party known to be represented by counsel without giving the party advance warning.

SECTION 16. An attorney should avoid even the appearance of bias by notifying opposing counsel or an unrepresented opposing party of any close, personal relationships between the attorney and a judicial officer, arbitrator, mediator or court-appointed expert and allowing a reasonable opportunity to object.

SECTION 17. An attorney should respect the privacy rights of parties and non-parties.

SECTION 18. An attorney should negotiate and conclude written agreements in a cooperative manner and with informed authority of the client.

In addition to other applicable Sections of these Guidelines, attorneys engaged in a transactional practice have unique responsibilities because much of the practice is conducted without judicial supervision.

SECTION 19. In addition to other applicable Sections of these Guidelines, in family law proceedings an attorney should seek to reduce emotional tension and trauma and encourage the parties and attorneys to interact in a cooperative atmosphere, and keep the best interests of the children in mind.

SECTION 20. In addition to other applicable Sections of these Guidelines, criminal law practitioners have unique responsibilities. Prosecutors are charged with seeking justice, while defenders must zealously represent their clients even in the face of seemingly overwhelming evidence of guilt. In practicing criminal law, an attorney should appreciate these roles.

SECTION 21. Judges are encouraged to become familiar with these Guidelines and to support and promote them where appropriate in court proceedings.

ATTORNEY'S PLEDGE. I commit to these Guidelines of Civility and Professionalism and will be guided by a sense of integrity, cooperation and fair play.

I will abstain from rude, disruptive, disrespectful, and abusive behavior, and will act with dignity, decency, courtesy, and candor with opposing counsel, the courts and the public.

As part of my responsibility for the fair administration of justice, I will inform my clients of this commitment and, in an effort to help promote the responsible practice of law, I will encourage other attorneys to observe these Guidelines.

1 **[Attorney Letterhead]**

2 **(including fax no.)**

3

4

5

6

7

8

SUPERIOR COURT OF CALIFORNIA

9

COUNTY OF SACRAMENTO

10

Case No.

11

Plaintiff(s),

**MANDATORY SETTLEMENT
CONFERENCE STATEMENT OF
(PLAINTIFF/DEFENDANT, ETC.
(PARTY'S NAME)**

12

v.

13

Defendant(s).

_____ /

14

15

1. PARTIES AND COUNSEL

16

a. Identify separately each Plaintiff and the respective attorney of record.

17

b. (Plaintiffs) Also identify each outstanding lien claimant and the total amount claimed by

18

each.

19

c. Identify separately each Defendant and the respective attorney of record.

20

d. (Defendants) Also identify each insurance carrier and the name of the assigned adjuster

or corporate representative.

21

2. CASE STATEMENT

22

Provide a short statement of the facts of this case.

23

3. PLAINTIFF

24

a. Explain your position on this case.

25

Superior Court of California, County of Sacramento

b. List all economic damages claimed in this case (for each plaintiff state the nature of the past and future damages such as property damage, medical expense, loss of income, etc).

c. List all non-economic damages claimed in this case.

d. Specify attorney fees, if any, that may be awarded to you.

e. Set forth all efforts made to negotiate all liens as required by Local Rule 4.01c(4). f.

Is a claim for punitive damages made? If so, what is the basis of such claim?

4. **DEFENDANT**

a. Explain your position on this case.

b. Specify attorney fees, if any, that may be awarded to you.

c. Are there any medical payment reimbursement issues? If so, please explain.

d. Do you anticipate any claim for post-trial reduction of special damages? If so, please explain.

5. **LEGAL ISSUES**

Identify major disputed legal issues.

6. **FACTUAL ISSUES**

Identify major disputed factual issues.

7. **OFFERS**

a. Specify all 998 offers made and the dates thereof.

b. What is the last best offer to settle made by each party?

Plaintiff(s):

Defendant(s):

Other(s):

8. **SETTLEMENT EFFORTS**

State what efforts have been made to settle.

9. **ARBITRATION**

a. State the date, name of arbitrator, and decision.

b. State whether you expect a jury verdict to be different.

c. State, in detail, why you expect a jury verdict to differ from the arbitrator's award.

10. **LENGTH OF TRIAL**

a. Please state the anticipated length of trial.

Superior Court of California, County of Sacramento

b. Please state the number of non-expert witnesses that you intend to call.

c. Please state the number of experts that you intend to call, specifying the number of retained experts and the number of non-retained experts.

11. **INSURANCE CARRIERS** (to be answered by defendants and cross defendants only).

a. Please list all primary and excess carriers to which a defense tender has been made and whether or not such demand(s) has (have) been accepted.

b. Is there any pending reservation of rights? If so, please explain.

12. **ATTACHMENTS**

Provide additional information or attachments, if any, which will aid the settlement, judge (such as excerpts from medical or police reports, photographs, compilations of damages, contracts, arbitrator decision, etc.).

I declare under penalty of perjury under the laws of the State of California, that the information provided herein reflects my good faith belief in the accuracy of the responses provided and that I am aware of the requirements of the Local Rules (4.00 et seq.) regarding mandatory settlement conferences.

DATED:

(signature)

Attorney for _____

Superior Court of California, County of Sacramento

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**LOCAL FORMS MASTER
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CIVIL			Effective Date
Abandonment of Appeal	CV/E-MU-01	Optional	09/01/06
Amendment to Complaint	CV/E-120	Optional	11/13/11
Arbitrator Panel Application	CV/E-ARB-102	Mandatory	06/17/13
Attachment to Stipulation and Order to Arbitration/Mediation – Limited Civil Cases	CV/E-203a	Mandatory	01/01/14
Attorney/Party Compliance Statement	CV/E-112	Mandatory	10/24/18
Award of Arbitrator	CV/E-ARB-126	Mandatory	02/13/09
Certification for Short Cause Matters	CV/E-131	Mandatory	02/13/09
Civil Bench Warrant	CV/E-127A	Mandatory	03/25/14
Civil Bench Warrant with Instructions	CV/E-127B	Mandatory	06/23/15
Declaration and Request for Exemption from Mandatory Settlement Conference Program	CV/E-MED-170	Mandatory	6/17/03
Declaration of Diligent Search and Request to Dispense with Notice Re: Petition for Change of Name	CV/E-208	Optional	08/08/19
Default Judgment Status Statement	CV/E-148	Mandatory	02/13/09
Designation Statement	CV/E-113	Mandatory	05/13/15
Ex Parte Application to Extend Arbitration Date	CV/E-ARB-115	Mandatory	02/13/09
Ex Parte Application to Extend time and to Select Trial Date and Mandatory Settlement Conference Date	CV/E-TSP-185	Mandatory	02/13/09
Judgment by Default by Clerk	CV/E-121	Optional	03/08/06
Judgment by Default by Court	CV/E-122	Optional	03/08/06
Judgment Pursuant to 1710.25 (Sister State)	CV/E-123	Optional	04/10/17
Limited Civil Case Status Memorandum	CV/E-202	Mandatory	07/01/16
Notice of Appeal (Limited Civil Case)	CV/E-MU-17	Optional	09/01/06
Program Case Notice	CV/E-143	Mandatory	02/16/16
Qualification Statement/Notice of Assignment of Arbitration Hearing Date	CV/E-ARB-119	Mandatory	06/03/13
Rejection of Arbitration Award and Request for Trial De Novo	CV/E-ARB-116	Optional	06/17/13
Stipulation and Order to Arbitration/Mediation – Limited Civil Cases	CV/E-203	Mandatory	01/01/14

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Stipulation and Order to Mediation – Unlimited Civil Cases	CVE-MED-179	Mandatory	01/01/14
Uninsured Motorist Statement	CVE-132	Mandatory	10/27/15
CRIMINAL			
Criminal Records Credit Card Authorization Form	CR-500B	Mandatory	10/1/21
Local Criminal Records Copy Request	CR-278C	Mandatory	10/1/21
Local Criminal Records Name Search Request	CR-278A	Mandatory	10/1/21
Notification of Military Status	MIL-100	Mandatory	9/1/16
Petition for Certificate of Rehabilitation and Pardon	FORM 1	Mandatory	1/21/98
Petition for Re-designation of Sentence (Proposition 47)	CR-325	Mandatory	5/15/17
Petition for Re-designation of Sentence (Proposition 64)	CR-335	Mandatory	11/9/16
Petition to Terminate Sex Offender Registration = Information - Sacramento	CR-415-INFO	Mandatory	7/1/21
Petition to Terminate Sex Offender Registration (Pen. Code § 290.5) - Sacramento	CR-415	Mandatory	7/1/21
Plea in Absentia DUI / Non DUI Combined	CR-142	Mandatory	3/1/17
Proof of Service - Sex Offender Registration Termination (Pen. Code § 290.5) - Sacramento	CR-416	Mandatory	7/1/21
Waiver and Plea Form	CR-57	Mandatory	5/1/21
Waiver and Plea Injury With Prior	CR-170	Mandatory	5/1/21
Waiver and Plea No Priors	CR-171	Mandatory	5/1/21
Waiver and Plea One Prior	CR-172	Mandatory	5/1/21
Waiver and Plea Reckless Driving	CR-63	Mandatory	5/1/21
Waiver and Plea Three or More	CR-174	Mandatory	5/1/21
Waiver and Plea Two Priors	CR-173	Mandatory	5/1/21
Waiver of Defendant's Personal Presence PC 977c	CR-315	Mandatory	4/1/20
FAMILY LAW			
Authorization for Non-Attorney Court Document Preparer	FL/E-LP-609	Mandatory	12/30/16
Counter Memorandum to Set (Family Law)	FL/E-LP-605	Mandatory	1/01/24
Credit Card Authorization	FL/E-LP-627	Mandatory	1/19/16
Declaration of Private Child Custody Recommending Counselor Regarding Qualifications	FL/E-FR-411	Mandatory	1/1/13
Document Drop-Off Sheet for Domestic Violence and Ex Parte Applications form	FL/E-LP-668	Mandatory	10/28/20
Family Court Services Parenting Plan Questionnaire Confidential	FL/E-ME-802	Mandatory	2/27/23
Family Law Case Demographics Information Sheet for Child Custody/Visitation	FL/E-ME-811	Mandatory	11/8/19
Family Law Case Participant Enrollment Form (Attorney)	FL/E-LP-666	Mandatory	2/5/18
Family Law Case Participant Enrollment Form (Party)	FL/E-LP-665	Mandatory	1/21/21
Grandparent Visitation Questionnaire	FL/E-ME-825	Mandatory	2/27/23
Guardianship Questionnaire	FL/E-ME-815	Mandatory	2/27/23
Investigation Questionnaire	FL/E-LP-647	Mandatory	1/31/17

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Memorandum to Set (Family Law) /Amended Memorandum to Set (Family Law)	FL/E-LP-625	Mandatory	2/14/19
Order for Private Child Custody Recommending Counseling	FL/E-LP-603	Mandatory	11/25/13
Order Granting Inspection of Adoption Records	FL/E-LP-646	Optional	12/3/09
Parent Child Relationship Declaration (Family Code Section 6323)	FL/E-LP-616	Mandatory	9/11/15
Petition for Confidential Mediation	FL/E-ME-804	Mandatory	4/26/17
Petition for Grandparent Visitation	FL/E-LP-606	Mandatory	1/14/16
Petition for Joinder (Custody/Visitation)	FL/E-LP-607	Mandatory	1/20/16
Petition for Joinder (Property etc.)	FL/E-LP-608	Mandatory	3/3/09
Petition for Private Child Custody Recommending Counseling	FL/E-LP-601	Mandatory	11/25/13
Petition to Inspect Adoption Records	FL/E-LP-645	Optional	12/3/09
Request for Copies of Family Law Records	FL/E-LP-662	Mandatory	2/24/20
Request to Drop or Continue Hearing, Long Cause Hearing or Trial	FL/E-CT-031	Mandatory	6/3/21
Response to the Petition for Private Child Custody Recommending Counseling	FL/E-LP-602	Mandatory	11/25/13
Statement of Issues	FL/E-CT-032	Optional	10/15/21
JUVENILE			
Application for Rehearing and Statement	JC/E-001	Mandatory	8/19/22
Application for Approval of a Minor's Request for Voluntary Inpatient Treatment (WIC 6552)	JC/E-312	Mandatory	8/19/22
Court-Appointed Dependency Attorney's Certification of Competency	JC/E-005	Mandatory	8/19/22
Complaint Regarding Performance of Court Appointed Attorney	JC/E-003	Mandatory	8/19/22
Court Order for Medical Authorization	JC/E-670	Mandatory	10/13/21
Court Ordered Psychological/Psychiatric Evaluation or Mental Health Assessment for Children	JC/E-327	Mandatory	7/17/19
Court Ordered Psychological/Psychiatric Evaluation or Mental Health Assessment for Parent(s)	JC/E-326	Mandatory	4/7/21
Juvenile Dependency Ex Parte Application and Declaration Re: Notice	JC/E-335	Optional	9/29/22
Juvenile Dependency Settlement Conference (JDSC) Statement	JC/E-348	Optional	3/3/18
Notice of Psychiatric Hospitalization and/or Release of Minor	JC/E-311	Optional	1/1/19

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Order to Produce State Prisoner to Testify	JC/E-331	Mandatory	4/28/23
Pre-Jurisdictional Motion to Modify Court Order / Order	JC/E-319	Optional	8/19/22
Pre-trial Statement	JC/E-305	Optional	8/19/22
Request to Attend Juvenile Court Proceedings	JC/E-006	Mandatory	8/19/22
Retained Dependency Attorney's Certification of Competency	JC/E-005-R	Mandatory	8/19/22
Stipulation and Request for Order Following Meet and Confer / Order	JC/E-324	Optional	9/29/22
Stipulated Request and Order	JC/E-601	Optional	4/1/10
PROBATE			
Request to Drop or Continue Hearing, Long Cause Hearing or Trial by Stipulation	PR/E-CT-209	Mandatory	1/01/24
Declaration of Diligent Search and Request to Dispense with Notice	PR/E-LP-010	Mandatory	1/13/10
Notification to Court of Address of Conservatorship	PR/E-LP-012C	Mandatory	4/1/14
Notification to Court of Address on Guardian	PR/E-LP-012G	Mandatory	8/3/09
Verification that Video Tape of Conservator's Duties has been Viewed	PR/E-LP-020	Mandatory	7/9/19
Declaration and Notice Upon Ex Parte Application for Orders – Probate	PR/E-LP-036	Mandatory	8/25/16
Attachment to Declaration of Notice Upon Ex Parte Application for Orders – Probate	PR/E-LP-043	Mandatory	4/18/14
Request for Court Ordered Visitation	PR-E-LP-026	Mandatory	9/27/17
Petition for Confidential Mediation Regarding Visitation	PR-E-LP-025	Mandatory	9/25/17
Property Tax Certification	PR-E-LP-037	Mandatory	1/26/09
Termination of Guardianship – Supplemental Information	PR/E-LP-039	Mandatory	7/21/10
Guardianship Check-off Sheet	PR/E-LP-040	Optional	9/30/10
Response to Calendar Notes	PR-E-LP-022	Optional	5/17/18
Authorization for Non-Attorney Court Document Preparer	PR/E-LP-021	Optional	6/9/08
Confidential Conservator Screening Form Additional Page	PR/E-LP-018	Mandatory	1/3/12
Confidential Guardian Screening Form Additional Page	PR/E-LP-008	Mandatory	12/30/10
Confidential Cover Page For Financial Account Statement	PR/E-LP-007	Mandatory	1/1/05
Alternative Dispute Resolution Certification and Selection Form	PR/E-LP-002	Mandatory	11/21/07

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Stipulation to Alternative Dispute Resolution and to Select ADR Provider	PR/E-LP-001	Mandatory	11/21/07
Request for Waiver of Probate Court Investigator Fee – Conservator Cases Only	PR-E-LP-044	Mandatory	9/14/11
Objection to Limited Conservatorship	PR/E-LP-049	Mandatory	8/15/19
Objection to Limited Conservatorship Attachment	PR/E-LP-049a	Mandatory	8/15/19
Proof of Personal Service	PR-E-LP-015	Mandatory	12/2/98
Request for Copies of Probate Records	PR/E-LP-052	Mandatory	12/08/22
Caregiver’s Authorization Affidavit	PR/E-LP-023	Optional	10/11/11
SMALL CLAIMS			
Application and Ex Parte Motion for Entry of Satisfaction of Judgment by Court	SCL/E-1	Optional	1/1/07
Certificate of Added Costs	SCL/E-3	Optional	1/1/07
Civil Bench Warrant	SCL/E-2	Mandatory	1/1/07
Civil Bench Warrant with Instructions	7483 Form 056 – County	Optional	7/1/15
Ex Parte Declaration and Order to Set Aside Judgment in Installments	SCL/E-4	Optional	1/1/07
Request for Court Reset	SCL/E-5	Optional	1/4/11
TRAFFIC			
Abandonment of Appeal	CR-145	Optional	1/1/17
Agreement to Attend – Alcohol or Drug Program	TRL/I-55	Optional	6/1/20
Acknowledgment of Responsibility, Payment of Court Appointed Counsel Fees (PD)	TRL/I-60	Optional	1/1/07
Agreement to Attend – Aware Driver 2.0 Program	TRL/I-161	Optional	10/1/21
Agreement to Attend – Mature Driver Program	TRL/I-160	Optional	10/1/21
Agreement to Attend – Traffic Violator School	TRL/I-32	Optional	9/1/21
Agreement to Pay Department of Revenue Recovery	TRL/I-31	Optional	10/1/21
Agreement to Pay Fine	TRL/I-52	Optional	10/1/21
Agreement to Report - Car Seat Program	TRL/I-107 TRL/I-108	Optional	9/1/18 9/1/18
Agreement to Report - Safety Program	TRL/I-163	Optional	10/1/21
Agreement to Report to Alternative Sentencing Program	TRL/I-54A	Optional	11/1/21
Agreement to Report to Jail	TRL/I-57	Optional	10/1/21

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Boater Safety Course Referral	TRL/I-106	Optional	9/1/18
Civil Assessment Failure to Appear Notice	TRL-122	Mandatory	11/1/20
Copy / Certified Copy Notice	TRL/I-89	Optional	2/1/16
Court Date Change Notice	TRL/I-75 TRL/I-TBD	Optional	9/1/18 4/1/20
Court Date Verification Form	TRL/I-110 TRL/I-111 TRL/I-112 TRL/I-113 TRL/I-134 TRL/I-142 TRL/I-143 TRL/I-144 TRL/I-149	Optional	11/1/20 11/1/20 11/1/20 11/1/20 11/1/20 4/1/21 4/1/21 2/1/21 11/1/20
Court Trial Continuance Request Form	TRL/I-70	Optional	12/1/11
Decision and Notice of Decision	TR-215	Mandatory	1/1/98
Deferred Entry of Judgment, Referral and Enrollment Form	N/A Form provided by vendor	Optional	1/1/21
False Insurance Notice	TRL/I-87	Optional	11/1/06
Faretta Warning Form	TRL/I-69	Optional	1/1/08
Information on Appeal Procedures for Infractions	CR-141	Optional	1/1/20
Loaves and Fishes Community Service Referral Form	TRL/I-53	Optional	9/1/18
Notice and Instructions to Arresting Officer	TR-210	Mandatory	1/1/99
Notice of Appeal and Record of Oral Proceedings	CR142	Optional	1/1/20
Notice of Court Driver's License Suspension	TRL/I-119	Optional	4/1/21
Notice of Decision - Trial in Absentia Notice	TRL/I-92	Optional	10/1/21
Notice of Fines Due	TRL/I-100	Optional	9/1/18
Notice of Non-Compliance / Clearance	TRL/I-102	Optional	8/1/19
Notice of Non-Compliance or Ineligibility	TRL/I-86	Optional	3/1/17
Officer's Declaration	TR-235	Mandatory	1/1/00
Order and Notice to Defendant of New Trial (Trial de Novo)	TR-225	Mandatory	1/1/99
Order Concerning Appellant's Proposed Statement on Appeal	CR-144	Optional	3/1/14
Plea in Absentia Form	TR-72	Optional	10/1/00

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Proof of Insurance Insert	TRL/I-71A	Optional	5/1/18
Proof of Service	APP-109	Optional	1/1/17
Proposed Statement on Appeal	CR-143	Optional	1/1/21
Red Light Camera Statement Regarding Identification	TR-200 TR-205 TRL/I-16	Optional	1/1/99
Request for New Trial (Trial de Novo)	TR-220	Mandatory	1/1/99
Request Returned to Defendant Notice	TRL/I-84	Optional	12/1/19
Traffic School Notice of Non-Compliance / Ineligibility	TRL/I-73	Optional	7/1/17
Verification of Counter/Court Appearance Form	TRL/I-18	Optional	6/1/12
Waiver & Plea Form	TR-66	Optional	7/1/00
Written Trial by Declaration - Complete Packet	TRL/I-36	Optional	6/1/14
UNLAWFUL DETAINER			
Amendment To Complaint	CVE-120	Optional	11/3/11
Declaration in Support of Application for Default Judgment	UDL/E-7	Optional	1/1/07
Judgment by Default by Clerk For Restitution of Premises	UDL/E-3	Optional	1/1/07
Judgment by Default by Court	UDL/E-4	Optional	1/1/07
Proof of Service by Mail	UDL/E-8	Optional	1/1/07

**Superior Court of California, County of Sacramento
LOCAL FORMS MASTER
LIST (By Form Number)**

Civil Bench Warrant with Instructions	7483 Form 056 – County	Optional	7/1/15
Proof of Service	APP-109	Optional	1/1/17
Waiver and Plea Form	CR-57	Mandatory	5/1/21
Waiver and Plea Reckless Driving	CR-63	Mandatory	5/1/21
Information on Appeal Procedures for Infractions	CR-141	Optional	1/1/20
Notice of Appeal and Record of Oral Proceedings	CR142	Optional	1/1/20
Plea in Absentia DUI / Non DUI Combined	CR-142	Mandatory	3/1/17
Proposed Statement on Appeal	CR-143	Optional	1/1/21
Order Concerning Appellant's Proposed Statement on Appeal	CR-144	Optional	3/1/14
Abandonment of Appeal	CR-145	Optional	1/1/17
Waiver and Plea Injury With Prior	CR-170	Mandatory	5/1/21
Waiver and Plea No Priors	CR-171	Mandatory	5/1/21
Waiver and Plea One Prior	CR-172	Mandatory	5/1/21
Waiver and Plea Two Priors	CR-173	Mandatory	5/1/21
Waiver and Plea Three or More	CR-174	Mandatory	5/1/21
Waiver and Plea No Priors	CR-175	Mandatory	5/1/21
Local Criminal Records Name Search Request	CR-278A	Mandatory	10/1/21
Local Criminal Records Copy Request	CR-278C	Mandatory	10/1/21
Waiver of Defendant's Personal Presence PC 977c	CR-315	Mandatory	4/1/20
Petition for Re-designation of Sentence (Proposition 47)	CR-325	Mandatory	5/15/17
Petition for Re-designation of Sentence (Proposition 64)	CR-335	Mandatory	11/9/16
Petition to Terminate Sex Offender Registration (Pen. Code § 290.5) - Sacramento	CR-415	Mandatory	7/1/21
Petition to Terminate Sex Offender Registration = Information - Sacramento	CR-415-INFO	Mandatory	7/1/21
Proof of Service - Sex Offender Registration Termination (Pen. Code § 290.5) - Sacramento	CR-416	Mandatory	7/1/21
Criminal Records Credit Card Authorization Form	CR-500B	Mandatory	10/1/21
Attorney/Party Compliance Statement	CV/E-112	Mandatory	10/24/18
Designation Statement	CV/E-113	Mandatory	05/13/15
Ex Parte Application to Extend Arbitration Date	CV/E-ARB-115	Mandatory	02/13/09
Rejection of Arbitration Award and Request for Trial De Novo	CV/E-ARB -116	Optional	06/17/13
Qualification Statement/Notice of Assignment of Arbitration Hearing Date	CV/E-ARB - 119	Mandatory	06/03/13
Amendment to Complaint	CV/E-120	Optional	11/13/11
Judgment by Default by Clerk	CV/E-121	Optional	03/08/06
Judgment by Default by Court	CV/E-122	Optional	03/08/06
Judgment Pursuant to 1710.25 (Sister State)	CV/E-123	Optional	04/10/17

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Award of Arbitrator	CV\E-ARB -126	Mandatory	02/13/09
Civil Bench Warrant	CV\E-127A	Mandatory	03/25/14
Civil Bench Warrant with Instructions	CV\E-127B	Mandatory	06/23/15
Certification for Short Cause Matters	CV\E-131	Mandatory	02/13/09
Uninsured Motorist Statement	CV\E-132	Mandatory	10/27/15
Program Case Notice	CV\E-143	Mandatory	02/16/16
Default Judgment Status Statement	CV\E-148	Mandatory	02/13/09
Limited Civil Case Status Memorandum	CV\E-202	Mandatory	07/01/16
Stipulation and Order to Arbitration/Mediation – Limited Civil Cases	CV\E-203a	Mandatory	01/01/14
Declaration of Diligent Search and Request to Dispense with Notice RE: Petition for Change of Name	CV\E-208	Optional	08/08/19
Arbitrator Panel Application	CV\E-ARB-102	Mandatory	06/17/13
Declaration and Request for Exemption from Mandatory Settlement Conference Program	CV\E-MED170	Mandatory	06/17/13
Stipulation and Order to Mediation – Unlimited Civil Cases	CV\E-MED-179	Mandatory	01/01/14
Abandonment of Appeal	CV\E-MU-01	Optional	09/01/06
Notice of Appeal (Limited Civil Case)	CV\E-MU-17	Optional	09/01/06
Ex Parte Application to Extend Time and to Select Trial Date and Mandatory Settlement Conference Date	CV\E-TSP-185	Mandatory	02/13/09
Request to Drop or Continue Hearing, Long Cause Hearing or Trial	FL/E-CT-031	Mandatory	6/3/21
Statement of Issues	FL/E-CT-032	Optional	10/15/21
Declaration of Private Child Custody Recommending Counselor Regarding Qualifications	FL/E-FR-411	Mandatory	1/1/13
Petition for Private Child Custody Recommending Counseling	FL/E-LP-601	Mandatory	11/25/13
Response to the Petition for Private Child Custody Recommending Counseling	FL/E-LP-602	Mandatory	11/25/13
Order for Private Child Custody Recommending Counseling	FL/E-LP-603	Mandatory	11/25/13
Counter Memorandum to Set (Family Law)	FL/E-LP-605	Mandatory	1/1/24
Petition for Grandparent Visitation	FL/E-LP-606	Mandatory	1/14/16
Petition for Joinder (Custody/Visitation)	FL/E-LP-607	Mandatory	1/20/16
Petition for Joinder (Property etc.)	FL/E-LP-608	Mandatory	3/3/09
Authorization for Non-Attorney Court Document Preparer	FL/E-LP-609	Mandatory	12/30/16
Parent Child Relationship Declaration (Family Code Section 6323)	FL/E-LP-616	Mandatory	9/11/15

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Memorandum to Set (Family Law) /Amended Memorandum to Set (Family Law)	FL/E-LP-625	Mandatory	2/14/19
Credit Card Authorization	FL/E-LP-627	Mandatory	1/19/16
Petition to Inspect Adoption Records	FL/E-LP-645	Optional	12/3/09
Order Granting Inspection of Adoption Records	FL/E-LP-646	Optional	12/3/09
Investigation Questionnaire	FL/E-LP-647	Mandatory	1/31/17
Request for Copies of Family Law Records	FL/E-LP-662	Mandatory	2/24/20
Family Law Case Participant Enrollment Form (Party)	FL/E-LP-665	Mandatory	1/21/21
Family Law Case Participant Enrollment Form (Attorney)	FL/E-LP-666	Mandatory	2/5/18
Document Drop-Off Sheet for Domestic Violence and Ex Parte Applications form	FL/E-LP-668	Mandatory	10/28/20
Family Court Services Parenting Plan Questionnaire Confidential	FL/E-ME-802	Mandatory	2/27/23
Petition for Confidential Mediation	FL/E-ME-804	Mandatory	4/26/17
Family Law Case Demographics Information Sheet for Child Custody/Visitation	FL/E-ME-811	Mandatory	11/8/19
Guardianship Questionnaire	FL/E-ME-815	Mandatory	2/27/23
Grandparent Visitation Questionnaire	FL/E-ME-825	Mandatory	2/27/23
Petition for Certificate of Rehabilitation and Pardon	FORM 1	Mandatory	1/21/98
Application for Rehearing and Statement	JC\E-001	Mandatory	6/1/18
Complaint Regarding Performance of Court Appointed Attorney	JC\E-003	Mandatory	8/1/17
Certification of Attorney Competency	JC\E-005	Mandatory	1/1/14
Request to Attend Juvenile Court Proceedings	JC\E-006	Mandatory	5/20/13
Pre-trial Statement	JC\E-305	Optional	1/1/00
Pre-Jurisdictional Motion to Modify Order of Court and/or Request for New Court Order	JC\E-319	Optional	10/1/18
Stipulation and Request for Order Following Meet and Confer	JC\E-324	Optional	5/24/13
Order on Stipulation and Request for Order Following Meet and Confer	JC\E-324_Order	Optional	5/24/13
Court Ordered Psychological/Psychiatric Evaluation or Mental Health Assessment for Parent(s)	JC\E-326	Mandatory	4/7/21
Court Ordered Psychological/Psychiatric Evaluation or Mental Health Assessment for Children	JC\E-327	Mandatory	7/17/19
Order to Produce State Prisoner to Testify	JC\E-331	Mandatory	5/1/10
Juvenile Dependency Ex Parte Application	JC\E-335	Mandatory	4/11/07
Notice to Court of Due Diligence of Mailing	JC\E-342	Mandatory	10/23/19

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Stipulated Request and Order to Change Trial Date	JC\E-358	Mandatory	10/4/18
Motion for Inclusion in Dependency Drug Court	JC\E-361	Mandatory	3/26/18
Notice of Reassignment of Court Appointed Attorney (Without Court Order)	JC\E-362	Mandatory	5/20/13
Order Authorizing Mental Health Care	JC\E-366	Mandatory	7/1/16
Stipulated Request and Order	JC\E-601	Optional	4/1/10
Juvenile Expert Panel Fee Claim Form	JC\E-639	Mandatory	9/8/17
Parent Complaint – Truancy	JC\E-649b	Mandatory	5/30/19
Court Order for Medical Authorization	JC\E-670	Mandatory	5/17/12
Juvenile Proceedings: Request for Court Reporter Transcript	JC-E-010	Mandatory	3/16/20
Notice of Psychiatric Hospitalization and/or Release of Minor	JC-E-311	Mandatory	1/1/19
Application for Approval of a Minor’s Request for Voluntary Inpatient Treatment (WIC 6552)	JC-E-312	Mandatory	1/1/19
Order on Application for Approval of a Minor’s Request for Voluntary Inpatient Psychiatric Treatment	JC-E-313	Mandatory	1/1/19
Court Ordered Assessment of Continued Parent/Child Relationship	JC-E-328	Mandatory	4/8/21
Request to Clear or Recall Warrant	JC-E-346	Mandatory	1/3/19
Juvenile Dependency Settlement Conference (JDSC) Statement	JC-E-348	Mandatory	3/13/18
Order Authorizing Medical and Dental Care and Limited Release of Information for Children Placed by the Juvenile Court in Out-of-Home Care	JC-E-365	Mandatory	5/20/21
Motion and Order to Return to Home Court Following Dependency Drug Court Dismissal	JC-E-367	Mandatory	9/1/17
Dependency Drug Court: Notice of Confidentiality and Waiver	JC-E-368	Mandatory	9/1/17
Request to Recall Arrest Warrant	JC-E-369	Mandatory	1/3/19
Calendar Request and Request to Clear Protective Custody Warrant Pre-Detention or Pre-Jurisdiction	JC-E-371	Mandatory	1/3/19
Request and Order for Adoption Records	JC-E-372	Optional	7/7/21
Application for Court-Appointed Juvenile Justice Expert Panel	JC-E-663	Mandatory	9/8/17
Declaration for Access to Juvenile Case File in Possession of Juvenile Court	JC-E-667	Mandatory	6/22/17
Physician’s Declaration RE: Medical, Surgical, or Dental Care	JC-E-677	Mandatory	7/1/16
Order Authorizing Emergency or Non-Routine Medical, Surgical, or Dental Care	JC-E-678	Mandatory	7/1/16
Request for Court Order Authorizing Emergency or Non-Routine Medical, Surgical, or Dental Care	JC-E-679	Mandatory	7/1/16
Notification of Military Status	MIL-100	Mandatory	9/1/16

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Deferred Entry of Judgment, Referral and Enrollment Form	N/A Form provided by vendor	Optional	1/1/21
Stipulation to Alternative Dispute Resolution and to Select ADR Provider	PR/E-LP-001	Mandatory	11/21/07
Alternative Dispute Resolution Certification and Selection Form	PR/E-LP-002	Mandatory	11/21/07
Confidential Cover Page For Financial Account Statement	PR/E-LP-007	Mandatory	1/1/05
Confidential Guardian Screening Form Additional Page	PR/E-LP-008	Mandatory	12/30/10
Request to Drop or Continue Hearing, Long Cause Hearing or Trial by Stipulation	PR/E-CT-209	Mandatory	1/1/24
Declaration of Diligent Search and Request to Dispense with Notice	PR/E-LP-010	Mandatory	1/13/10
Notification to Court of Address of Conservatorship	PR/E-LP-012C	Mandatory	4/1/14
Notification to Court of Address on Guardian	PR/E-LP-012G	Mandatory	8/3/09
Confidential Conservator Screening Form Additional Page	PR/E-LP-018	Mandatory	1/3/12
Verification that Video Tape of Conservator's Duties has been Viewed	PR/E-LP-020	Mandatory	7/9/19
Authorization for Non-Attorney Court Document Preparer	PR/E-LP-021	Optional	6/9/08
Caregiver's Authorization Affidavit	PR/E-LP-023	Optional	10/11/11
Declaration and Notice Upon Ex Parte Application for Orders – Probate	PR/E-LP-036	Mandatory	8/25/16
Termination of Guardianship – Supplemental Information	PR/E-LP-039	Mandatory	7/21/10
Guardianship Check-off Sheet	PR/E-LP-040	Optional	9/30/10
Attachment to Declaration of Notice Upon Ex Parte Application for Orders – Probate	PR/E-LP-043	Mandatory	4/18/14
Objection to Limited Conservatorship	PR/E-LP-049	Mandatory	8/15/19
Objection to Limited Conservatorship Attachment	PR/E-LP-049a	Mandatory	8/15/19
Request for Copies of Probate Records	PR/E-LP-052	Mandatory	12/8/22
Proof of Personal Service	PR-E-LP-015	Mandatory	12/2/98
Response to Calendar Notes	PR-E-LP-022	Optional	5/17/18
Petition for Confidential Mediation Regarding Visitation	PR-E-LP-025	Mandatory	9/25/17
Request for Court Ordered Visitation	PR-E-LP-026	Mandatory	9/27/17
Property Tax Certification	PR-E-LP-037	Mandatory	1/26/09
Request for Waiver of Probate Court Investigator Fee – Conservator Cases Only	PR-E-LP-044	Mandatory	9/14/11
Application and Ex Parte Motion for Entry of Satisfaction of Judgment by Court	SCL/E-1	Optional	1/1/07

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Civil Bench Warrant	SCL/E-2	Mandatory	1/1/07
Certificate of Added Costs	SCL/E-3	Optional	1/1/07
Ex Parte Declaration and Order to Set Aside Judgment in Installments	SCL/E-4		1/1/07
Request for Court Reset	SCL/E-5	Optional	1/4/11
Waiver & Plea Form	TR-66	Optional	7/1/00
Plea in Absentia Form	TR-72	Optional	10/1/00
Red Light Camera Statement Regarding Identification	TR-200 TR-205 TRL/I-16	Optional	1/1/99
Notice and Instructions to Arresting Officer	TR-210	Mandatory	1/1/99
Decision and Notice of Decision	TR-215	Mandatory	1/1/98
Request for New Trial (Trial de Novo)	TR-220	Mandatory	1/1/99
Order and Notice to Defendant of New Trial (Trial de Novo)	TR-225	Mandatory	1/1/99
Officer's Declaration	TR-235	Mandatory	1/1/00
Civil Assessment Failure to Appear Notice	TRL-122	Mandatory	11/1/20
Verification of Counter/Court Appearance Form	TRL/I-18	Optional	6/1/12
Agreement to Pay Department of Revenue Recovery	TRL/I-31	Optional	10/1/21
Agreement to Attend – Traffic Violator School	TRL/I-32	Optional	9/1/21
Written Trial by Declaration - Complete Packet	TRL/I-36	Optional	6/1/14
Agreement to Pay Fine	TRL/I-52	Optional	10/1/21
Loaves and Fishes Community Service Referral Form	TRL/I-53	Optional	9/1/18
Agreement to Report to Alternative Sentencing Program	TRL/I-54A	Optional	11/1/21
Agreement to Attend – Alcohol or Drug Program	TRL/I-55	Optional	6/1/20
Agreement to Report to Jail	TRL/I-57	Optional	10/1/21
Acknowledgment of Responsibility, Payment of Court Appointed Counsel Fees (PD)	TRL/I-60	Optional	1/1/07
Faretta Warning Form	TRL/I-69	Optional	1/1/08
Court Trial Continuance Request Form	TRL/I-70	Optional	12/1/11
Proof of Insurance Insert	TRL/I-71A	Optional	5/1/18
Traffic School Notice of Non-Compliance / Ineligibility	TRL/I-73	Optional	7/1/17

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Court Date Change Notice	TRL/I-75 TRL/I-TBD	Optional	9/1/18 4/1/20
Request Returned to Defendant Notice	TRL/I-84	Optional	12/1/19
Notice of Non-Compliance or Ineligibility	TRL/I-86	Optional	3/1/17
False Insurance Notice	TRL/I-87	Optional	11/1/06
Copy / Certified Copy Notice	TRL/I-89	Optional	2/1/16
Notice of Decision - Trial in Absentia Notice	TRL/I-92	Optional	10/1/21
Notice of Fines Due	TRL/I-100	Optional	9/1/18
Notice of Non-Compliance / Clearance	TRL/I-102	Optional	8/1/19
Boater Safety Course Referral	TRL/I-106	Optional	9/1/18
Agreement to Report - Car Seat Program	TRL/I-107 TRL/I-108	Optional	9/1/18 9/1/18
Court Date Verification Form	TRL/I-110 TRL/I-111 TRL/I-112 TRL/I-113 TRL/I-134 TRL/I-142 TRL/I-143 TRL/I-144 TRL/I-149	Optional	11/1/20 11/1/20 11/1/20 11/1/20 11/1/20 4/1/21 4/1/21 2/1/21
Notice of Court Driver's License Suspension	TRL/I-119	Optional	4/1/21
Agreement to Attend – Mature Driver Program	TRL/I-160	Optional	10/1/21
Agreement to Attend – Aware Driver 2.0 Program	TRL/I-161	Optional	10/1/21
Agreement to Report - Safety Program	TRL/I-163	Optional	10/1/21
Judgment by Default by Clerk For Restitution of Premises	UDL/E-3	Optional	1/1/07
Judgment by Default by Court	UDL/E-4	Optional	1/1/07
Declaration in Support of Application for Default Judgment	UDL/E-7	Optional	1/1/07
Proof of Service by Mail	UDL/E-8	Optional	1/1/07

(Revised 1/1/2014; 1/1/15; 1/1/2016; 1/1/2017; 1/1/2018; 1/1/2019; 1/1/20; 10/1/21; 1/1/22, 1/1/24)