

GUARDIANSHIP- STEP 2: PREPARE FOR YOUR HEARING

SELF-HELP FORM PACKET



Attention

New Probate Court and In-Person Location:

Costa Mesa Justice Complex
3390 Harbor Boulevard
Costa Mesa, CA 92626



SHC-PB-16 (Rev. 03/21/2024)

Self-Help Services can review your completed forms before you file them with the Court. To request review of your completed forms:

1. Complete the attached forms in black ink.
2. Scan your completed forms and save as a single PDF file.
3. Go to www.occourts.org/self-help (click the teal button labeled *Contact Self-Help*), attach the PDF, and complete the online request form. Make sure to select PROBATE as the case type on the form.

GUARDIANSHIP

Step 2: Prepare

COMMON WORDS

Calendar Days: Days in a calendar month. Including holidays and weekends.

Court Days: Days in a calendar month that the Court is open to the public.

Court Investigation: Fact finding search to determine if a Guardianship is necessary.

Deficiencies: Mistakes or follow up questions in your case.

Dismiss: The ending of a case filed with the Court before it is completed.

Guardianship Appointment Hearing: Court date when a Judge decides whether a Guardianship is necessary.

Notice of Hearing: Letting persons and agencies know that a Guardianship case has been filed and the date, time, and place of the Guardianship Appointment Hearing.

Personal Service: Giving Notice of Hearing by handing copies of certain Court Forms.

Probate Examiner: Probate case file reviewers.

Probate Notes: Overview of case, important dates, parties' requests, and Deficiencies.

Service by Mail: Providing Notice of Hearing by mailing copies of certain Court Forms.

OVERVIEW

Your **Guardianship Appointment Hearing** is weeks away. That may feel like you have a lot of time, but if you do not complete what is required, your hearing will be postponed. If your hearing is postponed repeatedly, the Court may **Dismiss** your Guardianship case and you will need to refile and start from the beginning.

You must complete the following tasks before your hearing:

Notice of Hearing

- **Notice of Hearing** is completed when copies of certain forms are given to the right people and agencies; in the way required by law; with enough time before your hearing.

Court Investigation

- A **Court Investigation** is completed when a Court Investigator prepares a report explaining to the Judge whether a Guardianship is needed for the Ward and the proposed Guardian is qualified to take care of the Ward and their property, if applicable.

Probate Notes

- **Probate Examiners** review your case file to make sure your forms are complete and meet legal requirements. During this review, they create **Probate Notes**. **Probate Notes** set out an overview of the case, important dates, parties requests, and **Deficiencies**. **Deficiencies** are the **Probate Examiners** way to tell you what problems they found and how to fix them. You must clear all your **Deficiencies** before your hearing. If you do not, your hearing date will be postponed.

This packet will cover how to complete these tasks and meet all deadlines.

➤ If You Need Assistance:

- Public Law Center helps with form completion. Please see the attached flyer for more information.

NOTICE OF HEARING

Who Must be Given Notice?

- The following people and agencies must be given notice at least 15 Calendar Days before the hearing:
 - Ward, only if 12 years old or older
 - Ward's mother
 - Ward's father
 - Ward's paternal grandparents (father's parents)
 - Ward's maternal grandparents (mother's parents)
 - Ward's brothers and sisters (this includes half-brothers and sisters)
 - The person with legal custody of the Ward now
 - The proposed Guardian if the Guardian is not the person filing for Guardianship
 - If applicable, any attorney representing the Ward
 - Orange County Social Services Agency
 - Address
 - Social Services Supervisor
P.O. Box 14174
Orange, CA 92853
- If the Guardian is not related to the Ward by blood, marriage or adoption, the following agency must be given notice at least 15 Calendar Days before the hearing:
 - California Department of Social Services
 - Address
 - Director of Social Services
744 P Street
Sacramento, CA 95814
- If the Ward has developmental disabilities, the following agency, must be given notice at least 30 Calendar Days before the hearing:
 - Orange County Regional Services
 - Address
 - Director of Regional Services
P.O. Box 22010
Santa Ana, CA 92702
- If you know or have reason to believe that the Ward is a member of an Indian tribe recognized by the federal government or is eligible for membership, you must serve additional persons and agencies. Please reach out to us Self-Help for more information.

NOTICE OF HEARING ROADMAP



Forms



Copies



Envelopes



Service



Complete Proof of Service
Forms



File

- If the identity or location of any people and relatives that must be served is unknown, one **L-0759- Declaration of Due Diligence and Request to Dispense with Notice** must be filed for each person.
 - If the identity is unknown, L-0759, Item A, must be completed.
 - If the identity is known but not location, L-0759, Item B, must be completed.
 - Make sure to include details of all your efforts to locate the person and what you found.

How Must Notice be Given?

- **Personal Service** must be provided to:
 - Ward, only if 12 years old or older
 - Ward’s mother
 - Ward’s father
 - Person(s) with legal custody of Ward
 - The proposed Guardian if the Guardian is not the person filing for Guardianship
- **Service by Mail** may be provided to:
 - Ward’s paternal grandparents (father’s parents)
 - Ward’s maternal grandparents (mother’s parents)
 - Ward’s brothers and sisters (this includes half-brothers and sisters)
 - If applicable:
 - Orange County Regional Services
 - Orange County Social Services Agency
 - California Department of Social Services
 - Indian Tribe Persons and Agencies

What Must be Given?

- Notice is provided when each person or entity is served with:
 - A copy of your filed GC-210 (P) or GC-210— Petition for Appointment of Guardian
 - Including any attachments
 - A copy of your filed GC-210 (CA)— Child Information Attachment to Probate Guardianship of Minor
 - If more than one Ward is involved, a copy of each Ward’s GC-210(CA) must be attached.
 - A copy of your filed ICWA-010(A)—Indian Child Inquiry Attachment
 - **Form GC-020— Notice of Hearing** with Remote Hearing Attachment and **GC-207-INFO/JV-352-INFO—Comparison of Guardians With Other Nonparent Caregivers**

NOTICE OF HEARING ROADMAP



Forms



Copies



Envelopes



Service



Complete Proof of Service
Forms



File

Step by Step Procedure

- Complete Pg. 1 and the top of Pg. 2 (Case Name and Number) of Form GC- 020 – Notice of Hearing.
 - On Pg. 1, Item 4b, mark the box before the words “is (specify):” and write: See Attachment 4b
 - Attach Remote Hearing Attachment and GC-207-INFO/JV-352-INFO behind Pg. 2.
 - This should now be treated as your Original GC-020.
- Make enough copies of your Original GC-020, your filed GC-210 (P) or GC-210, GC-210 (CA), ICWA-010(A) and any attachments for each person and agency that must be served.
- Place your Original GC-020 aside. You will need it later.
- Gather one envelope for each person and agency.
- Place one copy of all required forms in each envelope.
- Address each envelope to each recipient that must be served.
- Separate the envelopes by those that need to be served by mail and those that must be served in person.
- **Service by Mail**
 - Add sufficient postage to each envelope.
 - **Service must be completed by an adult, who is not involved in the case.**
 - Standard mail is sufficient.
 - The adult that helped with service, must complete the “Proof of Service by Mail” section of Pg. 2 of your Original GC-020.
 - Make sure Item 5 is marked.
- **Personal Service**
 - **Service must be completed by an adult, who is not involved in the case.**
 - The envelope can be handed anywhere the person that must be served can be located.
 - The person served does not need to sign anything.
 - The adult that helped with service, must complete **Form GC-020 (P) –Proof of Personal Service** and attach it to your Original GC-020.
- Complete the “Name and Address of Each Person to Whom Notice was Mailed” section of Pg. 2 of your Original GC-020.
- File your Original GC-020 at least 5 Court Days before your hearing.

NOTICE OF HEARING ROADMAP



Forms



Copies



Envelopes



Service



Complete Proof of Service
Forms



File

COURT INVESTIGATION

When is Court Investigation Required?

- Guardianships of the Person or Person and Estate require an investigation.
 - Guardianships of the Estate only do not.
- The goal of the investigation is to prepare a report that provides the Judge with information about why a Guardianship is needed and the proposed Guardian's ability to meet the Ward's needs.

Who Completes the Court Investigation?

- A Court Investigator will be assigned by the Court to investigate a Guardianship if the proposed Guardian is related to the Ward.
 - If the proposed Guardian is not related to the Ward, the Orange County Social Services Agency will complete the investigation.

How is the Court Investigation Completed?

- The investigator will contact the Guardian, certain people, and relatives to schedule interviews.
 - Interviews may be conducted in person or remotely.
 - More than one interview may be necessary.
- A report will be created outlining findings from:
 - Visiting the Guardian's home
 - Interviewing the Ward and proposed Guardian
 - The Ward will be interviewed in an age and needs appropriate way.
 - Interviewing certain people and relatives
 - Completing a background check on the proposed Guardian, certain people, and relatives
- The **Court Investigation** costs \$650.00. The fee may be forgiven with a granted fee waiver.
- The Guardianship will be on hold until the report is filed so it is important to keep appointments with Court Investigators.

Copies of the Filed Court Investigation Report

- The final report is filed with the Court but is not available without approval from the Judge. To request a copy complete and file **Local Form L-0211: Request for Release of Confidential Report**.

COURT INVESTIGATION ROADMAP



Investigation Assigned



Appointments for Interviews



Interviews



Background Check



Court Report



File

PROBATE NOTES

What are Probate Notes?

- **Probate Examiners** assist the Judge by reviewing all filed documents to make sure they are complete and meet legal requirements. During review, they create **Probate Notes**.
- **Probate Notes** set out an overview of the case, important dates, parties requests and **Deficiencies**.
- **Deficiencies** are the **Probate Examiners** way of telling you what problems they found and how to fix them. They are updated approximately 3 weeks before your hearing date.
- The words **Deficiencies** and **Probate Notes** are often used interchangeably.

Accessing Probate Notes

- For a step-by-step video guiding you on how to access your **Probate Notes** visit:
<https://www.youtube.com/watch?v=NGRJ500PdQU>

Clearing Probate Notes Deficiencies

- **Deficiencies** must be corrected at least 5 Court Days before your hearing.
- If you need assistance clearing your **Probate Notes**, please register for our **Clearing Your Probate Notes Workshop**.

Document Review

The Self-Help Probate Team offers a free optional document review service for self-represented litigants. As part of this service, an attorney or paralegal will review your documents for completion before filing. **Our staff cannot provide you with legal advice or strategy during this review.** To have your completed documents reviewed, please attach them to your contact request here: www.occourts.org/self-help/

File Your Forms

You may file your documents by choosing one of the following options:

- In Person:
 - Costa Mesa Justice Complex, 3390 Harbor Boulevard, Costa Mesa, CA 92626
- DropBox:
 - Costa Mesa Justice Complex, 3390 Harbor Boulevard, Costa Mesa, CA 92626

PROBATE NOTES ROADMAP



Find Your Probate Notes



Clear Your Probate Notes



File Your Corrections



Service



Complete Proof of Service Forms



File

- Mail:
 - Costa Mesa Justice Complex, ATTN: Probate Filing Clerk, 3390 Harbor Boulevard, Costa Mesa, CA 92626
- E-filing:
 - For additional information visit the court's website:
 - <https://www.occourts.org/online-services/efiling/efiling-probate.html>

What is Next? Step 3: After Your Hearing

The Self-Help Probate Team offers the Guardianship- Step 3: After Your Hearing Form Packet (SHC-PB-17). That packet will walk you through your responsibilities after you have been appointed Guardian. For example, obtaining proof that you have been appointed as Guardian to present to school, doctors, or other required agencies, completing the required annual status report, procedures for moving out of Orange County or California, and terminating the Guardianship. Remember, this is only the beginning of a long-term relationship with the Court, and you have continual responsibilities until the Guardianship ends.

ROADMAP



Forms



Review



File



Prepare for the Hearing



Hearing



After the Hearing



PROVIDING ACCESS TO JUSTICE
FOR ORANGE COUNTY'S LOW INCOME RESIDENTS

FREE LEGAL CLINICS for SELF-REPRESENTED LITIGANTS IN GUARDIANSHIP of the PERSON

- WHO:** Self-represented individuals who are involved in a guardianship proceeding in Orange County Superior Court. This clinic is only for litigants who have not hired an attorney.
- WHAT:** **FREE** assistance with **Guardianship forms and procedure**, including:
- Guardianship filings
 - Objections to Guardianship
 - Preparation for Annual Status Conferences
 - Requests to Move
 - Terminations
- WHEN:** *Tuesdays 12:00 PM to 4:00 PM*
By appointment only
- HOW:** Register at <https://tinyurl.com/PLCGuard>
(or use the QR code provided);
Call 714-541-1010 ext 367; or
Email familylaw@publiclawcenter.org
- WHERE:** Public Law Center
615 Civic Center Drive West (3rd Floor)
Santa Ana, CA 92701



The clinic will be closed on holidays, national/court days and occasionally for administrative reasons.

CLÍNICA GRATUITA PARA LITIGANTES REPRESENTÁNDOSE POR SI MISMO EN OBTENER TUTELA LEGAL

QUIÉN: La clínica es solo para litigantes que no han contratado un abogado en procedimiento de tutela en la Corte Superior del Condado de Orange.

QUÉ: Asistencia gratuita con documentos y procedimiento de Tutela, incluyendo:

- Abrir un caso de Tutela
- Oponer a una Tutela
- Escribir una Declaración de Debida Diligencia
- Preparar para el Estado Conferencia Anual
- Petición para moverse afuera del Estado
- Petición para terminar una Tutela

CUÁNDO: Los martes a las 12:00 pm – 4:00 pm, *Solo por cita*

CÓMO: Registrarse al <https://tinyurl.com/PLCTutelaEsp>
(o use el código QR); llame al 714-541-1010, ext. 367;
o correo electrónico familylaw@publiclawcenter.org

DÓNDE: Public Law Center
615 Civic Center Drive West (tercer piso)
Santa Ana, CA 92701



La clínica permanecerá cerrada los días festivos, nacionales/de la corte y ocasionalmente por motivos administrativos.

ATTORNEY OR PARTY WITHOUT ATTORNEY (<i>Name, State Bar number, and address</i>): TELEPHONE NO.: _____ FAX NO. (<i>Optional</i>): _____ E-MAIL ADDRESS (<i>Optional</i>): _____ ATTORNEY FOR (<i>Name</i>): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (<i>Name</i>): <input type="checkbox"/> MINOR <input type="checkbox"/> (PROPOSED) CONSERVATEE	
NOTICE OF HEARING—GUARDIANSHIP OR CONSERVATORSHIP	CASE NUMBER: _____

**This notice is required by law.
This notice does not require you to appear in court, but you may attend the hearing if you wish.**

1. NOTICE is given that (*name*):
(*representative capacity, if any*):
has filed (*specify*):

2. You may refer to documents on file in this proceeding for more information. (*Some documents filed with the court are confidential. Under some circumstances you or your attorney may be able to see or receive copies of confidential documents if you file papers in the proceeding or apply to the court.*)

3. The petition includes an application for the independent exercise of powers by a guardian or conservator under Probate Code section 2108 Probate Code section 2590.
Powers requested are specified below specified in Attachment 3.

4. A HEARING on the matter will be held as follows:

a. Date:	Time:	Dept.:	Room:
b. Address of court <input type="checkbox"/> same as noted above <input type="checkbox"/> is (<i>specify</i>):			

Assistive listening systems, computer-assisted real-time captioning, or sign language interpreter services are available upon request if at least 5 days notice is provided. Contact the clerk's office for *Request for Accommodations by Persons with Disabilities and Order* (form MC-410). (Civil Code section 54.8.)



<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name): <input type="checkbox"/> MINOR <input type="checkbox"/> (PROPOSED) CONSERVATEE	CASE NUMBER:
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PROOF OF PERSONAL SERVICE OF NOTICE OF HEARING—GUARDIANSHIP OR CONSERVATORSHIP

(Attach a separate completed and signed copy of this form or other proof of personal service to Notice of Hearing-Guardianship or Conservatorship for each person who personally served a copy of the Notice.)

1. I am over the age of 18 and not a party to this cause.
2. I served the attached *Notice of Hearing—Guardianship or Conservatorship* by personally delivering a copy to each person listed below at the address and on the date and time indicated below.
3. I served with the attached *Notice of Hearing—Guardianship or Conservatorship* a copy of the petition or other document referred to in the Notice. **And GC-207-INFO/JV-352-INFO- Comparison of Guardians With Other Nonparent Caregivers.**
4. I served with the attached Notice of Hearing—Guardianship or Conservatorship copies of the following documents (*specify*):

 Continued on Attachment 4.
5. I am (*check all that apply*):
 - a. not a registered California process server.
 - b. a California sheriff or marshal.
 - c. a registered California process server.
 - d. an employee or independent contractor of a registered California process server.
 - e. exempt from registration (Bus. & Prof. Code, § 22350(b)).
6. My name, address, telephone number, and, if applicable, county of registration and number, are (*specify*):

NAME OF EACH PERSON PERSONALLY SERVED, ADDRESS WHERE SERVED, AND DATE AND TIME SERVICE WAS MADE

	<u>Name</u>	<u>Address where served (number, street, city, and state)</u>	<u>Date and time service made</u>
1.			Date: _____ Time: _____
2.			Date: _____ Time: _____
3.			Date: _____ Time: _____
4.			Date: _____ Time: _____

List of names and addresses of persons personally served by the undersigned continued on an attachment. (*You may use Attachment to Notice of Hearing Proof of Personal Service, form DE-120(PA)/GC-020(PA), for this purpose.*)

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

(For California sheriff or marshal use only)
I certify that the foregoing is true and correct.

Date:

Date:

(SIGNATURE)

(SIGNATURE)

Notice of the hearing on a petition for appointment of a probate guardian must include a copy of this form.

A California court can order care, custody, and control of a child transferred from a parent to another caregiver in a variety of cases. This form compares juvenile court and probate guardianship cases. In juvenile court, a foster parent, sometimes called a resource family, is a temporary caregiver. A guardian is a “permanent” caregiver. A probate court can also appoint a guardian, using different procedures and standards. The three charts in this form compare the rights and duties, available services and supports, and court processes in juvenile court and probate guardianship cases.

Charts in this form

- 1. The Rights and Duties of Different Types of Caregivers, at pages 2–4**
Compares foster parents/resource families with probate guardians and juvenile court guardians
- 2. The Services and Financial Support Available to Different Types of Caregivers, at pages 5–8**
Compares foster parents/resource families, probate guardians, and juvenile court guardians
- 3. How a Guardian Is Appointed and What Happens Afterward, at pages 9–11**
Compares probate guardians with juvenile court guardians

CAUTION: This form does not replace legal advice from a lawyer. Parents, potential caregivers, and potential guardians should consult a lawyer for answers to questions or concerns about their specific situation. Click this link, www.courts.ca.gov/selfhelp-findlawyer.htm, for help finding a lawyer.

Starting a case in probate court or juvenile court

A probate guardianship case begins when a private person files a petition to appoint a guardian. A juvenile dependency case begins only if the child welfare agency files a petition. However, a private person can ask the agency to file a petition. If the agency does not, that person can ask the juvenile court to order the agency to file a petition. Even if the agency files a petition, the juvenile court can deny it if the child doesn’t meet the legal standard. If the probate court thinks a juvenile dependency case might be appropriate after a guardianship case begins but before a guardian is appointed, the court can ask the agency to file a dependency petition and, if the agency does not, can ask the juvenile court to order the agency to file a petition.

Families can also arrange for care and a place to live for a child without going to court. These arrangements are usually temporary and often involve documents such as a Caregiver’s Authorization Affidavit (see www.courts.ca.gov/documents/caregiver.pdf) or a Voluntary Placement Agreement with a child welfare agency (see www.cdss.ca.gov/cdssweb/entres/forms/english/soc155.pdf). *Information on the Probate Guardianship of the Person* (form GC-205-INFO) gives information about these arrangements.

Foster parents/resource families

If a juvenile court finds that a child cannot continue living safely at home, the court will order the child placed out of the home in the care and custody of the county child welfare agency (sometimes called *child protective services* or CPS). The agency can then place the child in the home of an approved foster parent. If a foster parent has been approved through the resource family approval (RFA) process, the foster parent is sometimes called a *resource family*, so this form uses the term “foster parent/resource family.” Approval as a foster parent/resource family is difficult and takes time. Some families will not be approved because they do not meet the strict standards.

Guardians

A guardian is an adult appointed by either the probate court or the juvenile court to take long-term care, custody, and control of a child when the child’s parents are unavailable or unable to care for the child. A relative or nonrelative can be appointed as guardian if the court finds the appointment is in the child’s best interest. In general, probate guardians have the same rights and duties as juvenile court guardians. However, probate guardians have access to different, and often fewer, financial supports, services, and resources.

For more information on probate guardianship of the person, see *Information on Probate Guardianship of the Person* (form GC-205-INFO). For information on probate guardianship of the estate, see *Information on Probate Guardianship of the Estate* (form GC-206-INFO). For more information on juvenile court guardianship, see *Information on Juvenile Court Guardianship* (form JV-350-INFO).



1. The *Rights and Duties* of Different Types of Caregivers

Foster Parents/Resource Families	Guardians (Probate and Juvenile Court)
<i>Caregiver’s Fundamental Responsibilities and General Duties</i>	
<p>A foster parent/resource family works with child welfare agency social workers to provide care, supervision, and housing for the child.</p> <p>A foster parent/resource family receives foster care funds for the child’s needs, such as food and clothing, and works with the social worker to make sure the child receives available resources and services if the child has special needs.</p>	<p>A guardian, whether appointed by a probate court or juvenile court, has the same general rights and duties toward the child as a parent. In other words, a guardian has care, custody, and control of the child. However, the court that appoints the guardian can order the guardian to do or not to do certain things.</p> <p>The guardian is responsible for providing for food, clothing, shelter, education, and all the medical and dental needs of the child.</p> <p>The guardian must provide for the safety, protection, and physical and emotional growth of the child. Like a parent, a guardian should maintain close contact with the child’s school and doctor.</p> <p>If the child has special needs, the guardian must strive to meet those needs and secure appropriate services. Some children may have physical or learning disabilities. Other children come from abusive homes or have been victims of abuse. Counseling and other services may be necessary to help these children.</p>
<i>Custody and Visitation</i>	
<p>Physical custody of the child—that is, the right to decide where the child lives—is with the child welfare agency unless the court orders a specific placement.</p> <p>Parents retain legal custody subject to limitations set by the court.</p> <p>A foster parent/resource family must make sure the child takes part in visits and phone calls with parents and others authorized by the social worker or ordered by the court.</p> <p>A foster parent/resource family cannot, on their own, ask the court to terminate parental rights and adopt the child. They can, however, tell the social worker they would like to adopt the child.</p>	<p>The guardian has legal and physical custody of the child.</p> <p>Parents can no longer make decisions for the child while there is a guardianship. The rights of the parents are completely suspended—but not terminated—as long as the guardianship remains in effect.</p> <p>If a guardian is appointed, a parent or other person can ask the court to order the guardian to let them visit or spend time with the child. (In juvenile court, the court must allow the parent to visit the child unless it would be <i>detrimental</i> to the child.) If the court does not make an order, the guardian can decide who visits the child.</p> <p>After the child has been in the guardian’s custody for a minimum time, varying from six months to three years depending on the circumstances, the guardian may petition to terminate parental rights and adopt the child.</p>
<i>Residence</i>	
<p>The social worker and the court decide who the child will live with.</p>	<p>A guardian decides where the child lives. The child normally will live with the guardian, but the guardian can make other arrangements if they are in the best interest of the child.</p> <p>A guardian must give proper notice to the court and others of any address change of either the child or the guardian.</p> <p>A guardian must get court permission before changing the child’s residence to a place outside California.</p>



Foster Parents/Resource Families	Guardians (Probate and Juvenile Court)
Health Care	
<p>The social worker arranges care and treatment for the child’s medical, dental, and mental health needs, but the foster parent/resource family might be responsible for scheduling and transporting the child to these appointments.</p> <p>Parents keep their rights to make health-care decisions for the child except in an emergency or if the court orders otherwise.</p>	<p>The guardian must make sure that the child’s health-care needs are met. In most cases, the guardian has the authority to consent to the child’s medical treatment. However, if the child is 14 years of age or older, surgery may not be performed on the child unless (1) both the child and the guardian consent, (2) a court order specifically authorizes the surgery, or (3) an emergency exists.</p> <p>A guardian may not place a child in a mental health treatment facility against the child’s wishes. A separate legal process is required for such a placement. However, the guardian must obtain any counseling or other necessary mental health services needed by the child.</p> <p>The law also allows children to consent to certain types of treatment—including outpatient mental health treatment, medical care related to pregnancy or sexually transmitted diseases, and drug or alcohol treatment—without the consent of a parent or guardian.</p>
Education	
<p>When a child is in foster care, parents retain the rights to make educational and developmental-services decisions for the child unless the court limits these rights and assigns them to another person.</p> <p>If the court limits parental rights to make educational and developmental-services decisions, it may assign those rights to a foster parent/resource family. Otherwise, a foster parent/resource family cannot make those decisions or attend Individualized Education Program (IEP) meetings for the child unless invited by the person holding educational rights.</p> <p>A foster parent/resource family is responsible for making sure that the child attends school. If the child is receiving special education services, the foster parent/resource family works with the school district and service providers to ensure that the child receives all the services and supports in the child’s IEP. (See page 8 for information about financial support for children with special needs.)</p>	<p>A guardian is responsible for the child’s education and holds the child’s educational and developmental-services decisionmaking rights, unless the court appoints someone else to hold them. If a child needs special education and related services, the guardian must advocate for the child with the school district and make the appropriate arrangements. (See page 8 for information about financial support for children with special needs.)</p>



Foster Parents/Resource Families	Guardians (Probate and Juvenile Court)
Consent to Changes to the Child’s Status	
<p>A foster parent/resource family cannot consent to the child’s marriage, military enlistment, or driver’s license application, but the juvenile court can consent.</p>	<p>A guardian <i>and the court</i> must give permission for a minor child to get married.</p> <p>A guardian may consent to a minor child’s enlistment in the armed services or application for a driver’s license.</p> <p>A guardian may apply for a passport for a minor child.</p>
Financial Obligations	
<p>A foster parent/resource family receives foster care funds to pay for the child’s needs.</p>	<p>The guardian is responsible for the day-to-day financial support of the child, even though the parents are still obligated to support the child. The guardian may take legal action or contact the local child support agency to obtain child support from a parent.</p> <p>The child may also be eligible for Aid to Families with Dependent Children—Foster Care (AFDC-FC), Social Security benefits, Veterans Administration benefits, Indian child welfare benefits, and support from other public or private sources. (See Chart 2.)</p>
Legal Liability	
<p>Except in limited circumstances, a foster parent/resource family is immune from liability in a civil action to recover damages for injury, death, or loss to person or property caused by an act or omission of a child or nonminor dependent while the child or nonminor dependent is placed in the home of the foster parent/resource family. (See Welfare and Institutions Code section 362.06(b)(2).)</p>	<p>A guardian, like a parent, is liable for the harm and damage caused by the willful misconduct of a child. (See Civil Code, § 1714.1(a).) There is usually a limit on how much a guardian may be required to pay. There are special rules concerning harm caused by the use of a firearm.</p>
If you are concerned about your liability for a child’s conduct, you should contact an attorney.	
Other Rights or Duties	
<p>Foster parents/resource families are entitled to notice of statutory review hearings and permanency hearings. They may attend the hearings and give information about the child to the court. Caregivers who wish to submit information in writing may use <i>Caregiver Information Form</i> (form JV-290).</p> <p>Foster parents/resource families must be included in a child’s Child and Family Team (CFT) and must be notified of every CFT meeting. They may be invited to participate in or support a child’s services, such as counseling or other types of treatment.</p>	<p>The court may require the guardian to perform other duties, such as completing a parenting class or attend counseling sessions with the child. The guardian must follow all court orders and cooperate with court investigators.</p> <p>Court visitors and status reports: Some counties have programs in which “court visitors” track and review guardianships. If your county has such a program, you will be expected to cooperate with all the court visitor’s requests. In addition, a guardian may have to fill out and file status reports.</p>



2. The Services and Financial Support Available to Different Types of Caregivers

The payment amounts discussed below are updated annually based on the cost of living. Payments are made retroactively. For example, a child placed with a caregiver in January would receive funds for the month of January in February. The payment amounts given below are in effect from July 1, 2022, to June 30, 2023. For updated amounts, see www.cdss.ca.gov/inforesources/letters-regulations/letters-and-notice/all-county-letters.

Foster Parent/Resource Family	Probate Guardian	Juvenile Court Guardian
Cash Payments per Child—Relatives		
<p>Before a relative is approved as a foster parent/resource family, Emergency Caregiver (EC) funding is available at the foster care basic rate starting from the date the child is placed with the relative. EC funding is limited to the foster care basic rate, \$1,129 per month.</p> <p>After approval, the foster parent/resource family will receive foster care payments through federal Aid for Families with Dependent Children—Foster Care (AFDC-FC). These payments are set at the foster care basic rate, \$1,129 per month.</p> <p>There are different eligibility requirements for federal and state AFDC-FC. The child welfare agency will determine eligibility. For a child in relative foster care who is not eligible for federal AFDC-FC or EC, Approved Relative Caregiver (ARC) payments are available. These payments are set at the foster care basic rate, \$1,129 per month.</p> <p>California foster youth who are placed with a relative out of state are eligible for funds at the foster care rate in the state where they are placed.</p>	<p>Child-only California Work Opportunity and Responsibility to Kids Program (CalWORKs) payments are available for a child living with a relative guardian. The income of the family is considered in calculating the amount of cash aid the family receives.</p> <p>Payments are approximately one-half of the foster care basic rate paid to nonrelatives. A relative caregiver can receive this assistance before appointment as guardian if the child lives with the relative. Payments can drop below one-half of the foster care basic rate if there are multiple children in the home.</p> <p>CalWORKs Maximum Aid Payment (MAP) levels depend on variables such as geographic region and exempt/nonexempt status and are hard to calculate. From October 1, 2022, to September 30, 2024, MAP amounts for one child in California are expected to range from \$669 to \$779 per month. A social worker who specializes in benefits would be the best person to ask about MAP levels for cash aid.</p> <p>Payments end when the child turns 18 years old, but it is possible to extend payments to age 19 if the child is completing high school.</p>	<p>Kinship Guardianship Assistance Payment (Kin-GAP) payments are available to children who have lived with an approved relative guardian for at least six months. Kin-GAP families sign a written agreement with the county. The Kin-GAP payments begin once the agreement is signed and the juvenile court terminates the dependency case.</p> <p>Payments cannot exceed the amount the child was receiving in foster care, but they can include the foster care basic rate and any special needs supplements the child was receiving. The income of the child’s parents, Kin-GAP guardian, or any other relative living in the household is <i>not</i> used to determine the child’s Kin-GAP eligibility.</p> <p>Kin-GAP payments generally end when a child turns 18 but can continue until age 19 if the child is completing high school or until age 21 if the Kin-GAP payments started after the child turned 16 or if the child has an ongoing disability.</p> <p>If the court keeps the juvenile case open after appointing a relative guardian, the guardian can receive Approved Relative Caregiver (ARC) or foster care payments instead of Kin-GAP.</p> <p>In very rare situations, a relative guardian may not qualify for Kin-GAP, foster care, or ARC payments, but may still qualify for California Work Opportunity and Responsibility to Kids Program (CalWORKs) payments.</p>



Foster Parent/Resource Family	Probate Guardian	Juvenile Court Guardian
Cash Payments per Child—Nonrelatives		
<p>Before approval as a resource family, a nonrelative foster parent/resource family may receive Emergency Caregiver (EC) funding at the foster care basic rate, \$1,129 per month, starting from the date the child is placed with the nonrelative.</p> <p>After approval, the foster parent/resource family will receive foster care payments. Nonrelative resource families receive Aid to Families with Dependent Children—Foster Care (AFDC-FC) funds. There are federal and state AFDC-FC funding programs, and they have different eligibility requirements. The foster care basic rate is \$1,129 per month.</p>	<p>No cash payments are available until a guardian is appointed and the child begins living with the guardian.</p> <p>An eligible child living with a <i>nonrelative</i> probate guardian may receive state Aid to Families with Dependent Children—Foster Care (AFDC-FC) payments equivalent to the foster care basic rate, \$1,129 per month, after the court establishes a temporary guardianship.</p> <p>Payments usually end when the child turns 18 years old but may continue to age 19 if the child is completing high school or to age 21 if the child has a disability.</p>	<p>State Aid to Families with Dependent Children—Foster Care (AFDC-FC) is available to children who live with a nonrelative guardian. This rate may change depending on where you live, so before you move, ask if there will be a rate change. The foster care basic rate is \$1,129 per month.</p> <p>A youth who continues living with a former nonrelative guardian after reaching age 18 can continue to receive AFDC-FC payments until they turn 21 if they meet certain participation criteria related to work, school, or activities designed to remove barriers to employment.</p>
Medical Insurance		
<p>Children who qualify for the cash payments described above are also eligible for full-scope Medi-Cal services. Youth are eligible for Former Foster Youth Medi-Cal up to age 26.</p>	<p>A child who qualifies for CalWORKs (relative guardian) or AFDC-FC (nonrelative guardian) payments is eligible for Medi-Cal. After turning 18, a youth is <i>not</i> eligible for Former Foster Youth Medi-Cal but may qualify for Medi-Cal based on income.</p>	<p>Children who qualify for Kin-GAP, ARC, or CalWORKs payments also receive full-scope Medi-Cal health care services.</p>
Extended Foster Care and Other Transition Age Supports		
<p>Extended Foster Care benefits are available for youth living in foster care when they turn 18. These <i>nonminor dependents</i> can receive ongoing case management and EFC payments until they turn 21; they may also qualify for transitional housing and independent living placements.</p>	<p>A youth who turns 18 in a probate guardianship is <i>not</i> eligible for Extended Foster Care, Independent Living Program services, or Chafee Education and Training Vouchers.</p>	<p>Extended Foster Care benefits are <i>not</i> available for a youth who is under juvenile court guardianship when the youth turns 18 years old. But if the former guardian dies or no longer provides ongoing support to the youth, the youth can ask the juvenile court to open the dependency case again. If the court does, the youth may qualify for EFC payments if they complete the requirements.</p>



Foster Parent/Resource Family	Probate Guardian	Juvenile Court Guardian
Extended Foster Care and Other Transition Age Supports		
<p>Payment amounts vary by the type of living arrangement. They range from the foster care basic rate of \$1,129 per month to \$5,720 per month for a parenting youth living in transitional housing in a high-cost county.</p> <p>Independent Living Program funding is available for current and former foster youth up to age 21, if they were in foster care on or after they reached age 16. This funding can help youth learn household and money management and help them with education, housing, and employment.</p> <p>Chafee Education and Training Vouchers for postsecondary education are available for youth who were in foster care on or after age 16. Vouchers are worth up to \$5,000 per year.</p>	<p>However, a youth living with a former guardian and receiving CalWORKs (relative) or AFDC-FC (nonrelative) payments may continue receiving payments until age 19 if the youth is completing high school or another eligible education program or until age 21 if the youth has a disability.</p>	<p>Independent Living Program funding is available for current and former foster youth up to age 21, if they were in foster care on or after age 16, they entered into a Kin-GAP guardianship after age 16, or they entered into a nonrelated legal guardianship through juvenile court after age 8. This funding can help youth learn to manage their household and money and help them with education, housing, and employment.</p> <p>Chafee Education and Training Vouchers may be available. See the Foster Parent/Resource Family column for details.</p>
Childcare Assistance		
<p>The Emergency Child Care Bridge program provides childcare vouchers and navigation support to caregivers of children in foster care and to foster youth who have children of their own. Eligibility depends on available funding and county policy.</p>	<p>Income-based childcare assistance may be available to children in probate guardianships.</p>	<p>Emergency Child Care Bridge program benefits are not available after a guardianship is established, but income-based childcare assistance may be available.</p>
<p>California offers a variety of publicly funded childcare programs to eligible families. <i>Information on Probate Guardianship of the Person</i> (form GC-205-INFO) and <i>Information on Juvenile Court Guardianship</i> (form JV-350-INFO) give more information on these programs. Local childcare resource and referral agencies help families find childcare and determine whether they qualify for publicly funded childcare. Parents and guardians can find a local resource and referral agency here: https://rrnetwork.org/family-services/find-child-care.</p>		



Foster Parent/Resource Family	Probate Guardian	Juvenile Court Guardian
Special Needs Supplemental Payments		
<p>Special needs supplemental payments may be available. These payments are in addition to the basic rate, and can include:</p> <p>Level of Care based on the physical, behavioral, emotional, educational, health, and permanency care provided to a child. Payments range from \$1,129 to \$1,510 per month.</p> <p>Intensive Services Foster Care for children with intensive medical, behavioral, developmental, or emotional needs. The payment is \$2,946 per month.</p> <p>Specialized Care Increments for children with special medical, behavioral, developmental, or emotional needs. The amounts of these payments are set by the county. For more information, see www.cdss.ca.gov/inforesources/foster-care/specialized-care or speak to a social worker.</p> <p>Dual Agency Rate for children in foster care who also qualify for regional center services. These rates are \$1,323 per month for a child up to 3 years old and \$2,955 per month for a child over 3.</p> <p>Whole Family Foster Home and Infant Supplement payments are available to support youth living in foster care with their nondependent children. This rate is \$900 per month.</p> <p>An Expectant Parent Payment is available to support a youth in foster care for the last three months of pregnancy. This payment is \$2,700.</p> <p>A Clothing Allowance is available for foster children in some counties. The payment amount varies by county.</p> <p>Education Travel Reimbursement is available to caregivers who transport a child to the child’s school of origin (the school the child was attending before being placed in the resource family home). This rate is set by the state based on two round trips per day between the foster/resource family home and the school.</p>	<p>No special needs supplemental payments are available to a child with living with a <i>relative</i> probate guardian.</p> <p>A child living with a nonrelative probate guardian and receiving state AFDC-FC payments may also, if eligible, receive a specialized care increment, a clothing allowance, or the teen parent part of a Whole Family Foster Home payment.</p> <p>See the Foster Parent/Resource Family column for details about these payments.</p>	<p>Special needs supplemental payments may be available. These include:</p> <ul style="list-style-type: none"> • Level of Care • Intensive Services Foster Care • Specialized Care Increments • Dual Agency Rate • Whole Family Foster Home and Infant Supplement • Clothing Allowance <p>See the Foster Parent/Resource Family column for details about these payments.</p>



3. How a Guardian Is Appointed and What Happens Afterward

STAGE	Probate Guardian	Juvenile Court Guardian
<i>Petition</i>	A person who wants to be appointed guardian of a child must file a petition with the probate court. The child’s parent or the child, if at least 12 years old, can also file the petition. (See <i>Information on Probate Guardianship of the Person</i> (form GC-205-INFO).)	To start a juvenile court case, a county social worker or prosecuting attorney must file a petition in juvenile court.
<i>Investigation</i>	Before the court decides to appoint a guardian, an investigation is usually required. If the proposed guardian is a relative, a court investigator conducts the investigation. If the proposed guardian is not a relative, a county social worker conducts the investigation. The investigator prepares a report, makes a recommendation whether the petition should be granted, and files the report with the court, which makes it available to all persons served in the proceeding and their attorneys. The parent and the proposed guardian are responsible for the costs of the investigation unless payment would be a hardship.	The social worker or probation officer conducts an investigation to determine, among other things, whether to detain the child temporarily out of the parent’s home and whether to recommend that the court remove the child from the parent’s home. A person who wants to serve as guardian of a child in juvenile court should contact the child’s social worker or probation officer early in the case to ask if the child can live with them.
<i>Appointment of Counsel</i>	The probate court has the authority to appoint an attorney to represent the child. The court may also appoint an attorney for the Indian custodian or biological parent of an Indian child but does not otherwise have the authority to appoint counsel for a parent.	In a dependency case, the juvenile court must appoint counsel for the child unless it finds that the child would not benefit from the appointment. And in almost every case, the court appoints counsel for a parent who cannot afford counsel. In a juvenile justice case, the court must appoint counsel for the child if the child appears without counsel. The court may also appoint separate counsel for a parent in specific circumstances.
<i>Hearing</i>	The court holds a hearing to decide whether to appoint a guardian. A parent or other interested person may go to the hearing and object, orally or in writing, to the appointment of a guardian for the child or to the appointment of the person proposed as guardian in the petition. The court will decide whether appointing a guardian is necessary and in the child’s best interest.	The court holds a hearing to decide if the petition is true and whether to order the child placed out of the parent’s home. If it decides the child cannot live safely at home, the court will not appoint a guardian right away unless the parents and child agree. Instead, it will order the child placed first with a foster parent/resource family and order the social worker or probation officer to provide reunification services (see below).
<i>Reunification Services</i>	The probate court cannot order family reunification services but can order supportive services for the guardian and child, if needed.	The juvenile court can order services to help the parents and child reunify (live together safely) <i>before</i> it chooses a permanent plan (e.g., guardianship) but not afterward.



STAGE	Probate Guardian	Juvenile Court Guardian
<p><i>Decision to Appoint a Guardian</i></p>	<p>If the probate court finds that appointment of a guardian is necessary and in the child’s best interest, the court may appoint a guardian.</p>	<p>The juvenile court may appoint a guardian at different times during the case, after making the required findings. In a dependency case, if the court finds that the petition is true, it can appoint a guardian for the child at the dispositional hearing, if the parents and the child agree and the court finds that appointing the guardian is in the child’s best interest. In a juvenile justice case, the court can appoint a guardian for the child at any time after the dispositional hearing if the probation officer recommends it or the child’s attorney requests it. In either a dependency or juvenile justice case, if the court has ordered out-of-home placement and denied or terminated reunification services, the court can appoint a guardian as the child’s permanent plan at a separate hearing. The court decides whom to appoint as guardian. The person who has been caring for the child is almost always appointed. The procedures for appointing a guardian are generally the same in dependency and juvenile justice, but there are some differences. For more information, see <i>Information on Juvenile Court Guardianship</i> (form JV-350-INFO), and check with the social worker or probation officer.</p>
<p><i>Court Oversight</i></p>	<p>After a guardian is appointed, there are no regular court hearings, although the probate court has the authority to regulate and control the guardian’s actions. The court can order the guardian to allow visitation of the child with parents or other persons.</p> <p>The court may order the guardian to submit an annual status report to the court and, depending on the county, the court may hold a hearing. (See <i>Information on Probate Guardianship of the Person</i> (form GC-205-INFO).)</p> <p>On receipt of a request, the court may order the guardian to take action. The court may also order the guardian to appear and explain actions they have taken; the court may approve or rescind those actions.</p>	<p>The juvenile court keeps jurisdiction over the guardianship. When the court appoints a guardian, it must also issue parental visitation orders unless it finds that visitation would be detrimental to the child.</p> <p>In many cases after the guardianship is granted, especially if the guardian is related to the child, the court will terminate dependency or juvenile justice jurisdiction and will not hold any more regularly scheduled court hearings. In other cases, the court will grant the guardianship, keep dependency or juvenile justice jurisdiction, and continue to hold regular review hearings. After it terminates juvenile jurisdiction, the juvenile court keeps jurisdiction over the guardianship and can give orders to the guardian.</p> <p>Any request to change a court order, including a visitation order, or to end the guardianship must be filed in the juvenile court using <i>Request to Change Court Order</i> (form JV-180).</p>



STAGE	Probate Guardian	Juvenile Court Guardian
<i>Role of Social Worker or Probation Officer</i>	<p>A county social worker is responsible for screening any proposed guardian and for conducting the guardianship investigation if the proposed guardian is not related to the child.</p> <p>If the probate court thinks a child who is the subject of a guardianship petition may be abused or neglected, it can ask a social worker to investigate and file a dependency petition in the juvenile court before it decides whether to appoint a guardian. If the social worker files a dependency petition, then the juvenile court will have authority over the child’s custody and placement. The probate court case will be put on hold until the juvenile court case is over.</p> <p>After a probate guardian is appointed, no social worker is involved unless the child or guardian receives public financial support or services.</p>	<p>If the dependency or juvenile justice case is kept open after guardianship is granted, the social worker or probation officer will provide support to the guardian and child and prepare reports for scheduled juvenile court hearings.</p> <p>If the juvenile dependency or juvenile justice case is closed after guardianship is granted, the juvenile court will continue to oversee the guardianship. Continued involvement by the social worker or probation officer will depend on any services and financial support the child continues to receive.</p>
<i>Terminating Guardianship</i>	<p>The guardianship automatically terminates (ends) when the child turns 18 or if, before turning 18, the child dies, is emancipated by court order, gets married, joins the armed services, or is adopted.</p> <p>If the guardian, a parent, the child, an Indian custodian, or the child’s tribe shows that it is in the child’s best interest, the court can end the guardianship before the child turns 18. The longer the child has lived with the guardian, the harder it is to show that termination is in the child’s best interest.</p> <p>If the child consents, the court can extend a guardianship up to the child’s 21st birthday to let the child complete a federal application for Special Immigrant Juvenile status.</p>	<p>The guardianship automatically terminates when the child turns 18 or if, before reaching age 18, the child dies, is emancipated by court order, gets married, joins the armed services, or is adopted.</p> <p>The court can terminate the guardianship if it finds that another permanent plan, such as adoption, is in the child’s best interest. A social worker or probation officer, the guardian, a parent, the child, an Indian custodian, or the child’s tribe can file a request with the juvenile court to terminate the guardianship.</p>
<i>Terminating Parental Rights</i>	<p>Appointment of a probate guardian suspends parental rights, but does not terminate them. However, under the Probate Code, if a child has been living with the guardian for at least two years, the guardian can file a petition to terminate parental rights so that the guardian can adopt the child. Parents are entitled to appointed counsel if this happens. In some situations, specified in the Family Code, the guardian can ask to adopt the child after as few as six months have passed or may need to wait up to three years.</p> <p>If the child is an Indian child, the Indian Child Welfare Act requires different procedures.</p>	<p>Appointment of a juvenile court guardian suspends parental rights, but does not terminate them. A social worker or probation officer, the guardian, or the child can file a request with the juvenile court to terminate parental rights and change the permanent plan to adoption. The court will hold a hearing to decide whether to grant the request. Each parent is entitled to notice of the hearing, to participate, and to have an attorney appointed for them.</p> <p>If the child is an Indian child, the Indian Child Welfare Act requires different procedures.</p>

SHORT TITLE: <hr/>	CASE NUMBER:
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ATTACHMENT (Number): _____

(This Attachment may be used with any Judicial Council form.)

(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)

Page _____ of _____

(Add pages as required)

ATTORNEY OR PARTY WITHOUT ATTORNEY: STATE BAR NO.: NAME: FIRM NAME: STREET ADDRESS: CITY: STATE: ZIP CODE: TELEPHONE NO.: FAX NO.: E-MAIL ADDRESS: ATTORNEY FOR (name):	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE COSTA MESA JUSTICE COMPLEX 3390 Harbor Blvd. Costa Mesa, CA 92626-1554	
IN THE MATTER OF (Name):	CASE NUMBER:
DECLARATION OF DUE DILIGENCE AND REQUEST TO DISPENSE WITH NOTICE	HEARING DATE:
	DEPT.: TIME:
NOTE: Please complete Section A if you are unable to determine the name of the person to whom you are required to give notice, and/or Section B if you know the name of the person to whom you are required to give notice, but their location is unknown.	

I, (name) _____, declare as follows:

I am a Petitioner in this action.

A. I have been unable to determine the name of the (relationship) _____
of the (check one) Minor(s) Conservatee Decedent. I have attempted to determine the
name of this person as follows: _____

I ask the court to dispense with notice to this person.

B. I have been unable to locate the whereabouts of _____,
the (relationship) _____
of the (check one) Minor(s) Conservatee Decedent.

_____'s last known address is:

I and/or someone else (name) _____
last had contact with this person (details) _____

I attempted to reach him/her at their last known address or telephone number.

When: _____

How: _____

Result: _____

I searched Internet search engines (such as Bing, Google, and Yahoo, or other search engines).

Website Name: _____

Result: _____

Website Name: _____

Result: _____

Website Name: _____

Result: _____

I searched social media websites (such as Facebook, Instagram, and Twitter, or other websites).

Website Name: _____

Result: _____

Website Name: _____

Result: _____

Website Name: _____

Result: _____

I contacted his/her last known place of employment.

Employer: _____

Date(s) employed there: _____

Result: _____

I was unable to contact his/her last known place of employment because: _____

I contacted his/her relatives.

Name: _____ Date: _____

Relationship: _____

How: _____

Result: _____

Name: _____ Date: _____

Relationship: _____

How: _____

Result: _____

Name: _____ Date: _____

Relationship: _____

How: _____

Result: _____

Name: _____ Date: _____

Relationship: _____

How: _____

Result: _____

I was unable to contact his/her relatives because:

I contacted his/her friends and acquaintances.

Name: _____ Date: _____

How: _____

Result: _____

Name: _____ Date: _____

How: _____

Result: _____

Name: _____ Date: _____

How: _____

Result: _____

I was unable to contact his/her friends and acquaintances because: _____

I contacted the County Tax Assessors Office where I believe he/she owns property.

County: _____ Date: _____

Contact info: _____

Result: _____

County: _____ Date: _____

Contact info: _____

Result: _____

I was unable to contact the County Tax Assessors Office because: _____

I have reason to believe he/she is currently in a hospital or jail.

Place: _____ Date/Time: _____

Result: _____

Place: _____ Date/Time: _____

Result: _____

My other effort(s) to locate him/her include:

I ask the court to dispense with notice to the person identified above because I have been unable to give him/her notice of this proceeding, despite my diligent efforts.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed on *(date)* _____ at *(city)* _____, California.

(TYPE OR PRINT NAME)

(SIGNATURE OF PETITIONER)

ATTORNEY OR PARTY (Name and Address):	TELEPHONE NO.:	<i>FOR COURT USE ONLY</i>
ATTORNEY FOR (NAME): Self-Represented		
SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE STREET ADDRESS: 3390 Harbor Boulevard MAILING ADDRESS: 3390 Harbor Boulevard CITY, STATE AND ZIP CODE: Costa Mesa, CA 92626		
Case Name:		
REQUEST FOR RELEASE OF CONFIDENTIAL REPORT		Case Number:

Please select one: **Guardianship** **Conservatorship**

Pursuant to Probate Code section 1513(d) or 1826(n), the clerk of the court must make provisions for the availability of the court’s investigation report exclusively to persons entitled to its receipt.

1. My relationship to this case is: _____
(For example, Petitioner, Conservator, Mother, Son, Attorney for Petitioner or Attorney for Objector)
2. Name of person submitting request:

3. If you are not a person who either filed or has been served with a copy of the petition in this case, or an attorney for any such person, the clerk must have written authority of the Court before releasing the report. Explain here the reasons you are asking for a copy of the report:

4. I understand and agree that the investigation report is to remain confidential.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated: _____

Signature

This order is required only if section 3 is completed.

Based on the circumstances set forth above, the Court orders:

- Authority is granted to the clerk to release a copy of the report to the requesting person.
- The request is denied.

Dated: _____

JUDGE OF THE SUPERIOR COURT

REQUEST FOR RELEASE OF CONFIDENTIAL REPORT



SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE

SELF-HELP SERVICES

CLEARING YOUR PROBATE NOTES WORKSHOP

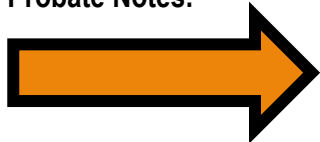
About Us:

Self-Help Services can help self-represented litigants correct Probate Notes in their case.

Benefits:

- Learn what Probate Notes are.
- Learn how to find your Probate Notes online.
- Learn how to correct your Probate Notes.
- Ask questions about your Probate Notes.
- Work on clearing your Probate Notes with staff.
- Plan for the next steps in your case.
- Avoid delays and to move your case forward.

Scan this QR Code
to learn more about
Probate Notes.



When?

- ☐ Mondays
- 🕒 9:00am – 11:00am



Where? You Choose:

- 📺 Remote or 🧑 In-Person:
- Costa Mesa Justice Complex
3390 Harbor Boulevard, #220
Costa Mesa, CA 92626



Do I Need to Register?

- Yes, you must register.
- 🚫 We are unable to assist Walk-Ins.



How Do I Register?

- 📞 Call: (657) 622-7170 or
- 📺 Online:
- ① Visit: www.occourts.org/self-help
- ② Click "Contact Self-Help Services"
- ③ Complete the request form:
 - Ask to register for the workshop
 - Select PROBATE case-type

■ Contact Us: Self-Help Services ■ 📞 Phone (657) 622-7170 ■ 🌐 Website: www.occourts.org/self-help ■



SHORT TITLE:	CASE NUMBER:
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I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____

(TYPE OR PRINT NAME)

(SIGNATURE OF DECLARANT)