Clearing Probate Calendar Notes for Guardianship or Conservatorship

Before a guardianship or conservatorship is granted, the court holds a hearing. In Sacramento, about 3 weeks before the hearing, the court posts "calendar notes" (also called "probate notes" or "probate calendar notes") in the online case file. These contain a list of papers and information that are missing, so that the petitioner can make sure the file is complete before the hearing. (Sacramento County Superior Court Local Rule 4.02 (https://www.saccourt.ca.gov/local-rules/docs/chapter-04.pdf)).

This process will be different, or may not exist, in other county probate courts.

Note: although this guide is intended for guardianship or conservatorship cases, the basic instructions and samples are the same for all probate cases, so it may be useful when probating estates as well.

Templates and Forms

Response to Calendar Notes (Sacramento County) (https://saccourt.ca.gov/forms/docs/pr-022.pdf)

At least 5 *court* days (Monday through Friday, excluding holidays) before the hearing date, the Petitioner must file their response to these Probate Calendar Notes, along with any necessary documents, at the Probate Filing Counter in Room 214 at the William R. Ridgeway Family Relations Courthouse (https://www.saccourt.ca.gov/locations/wrrfrc.aspx).

Related Step-by-Step Guides

- Declaration of Diligent Search (https://www.saclaw.org/resource_library/declaration-of-diligent-search-guardianship-dispensing-with-notice-to-missing-relative/)
- Guardianship Checklist (https://www.saclaw.org/video-library/applying-for-guardianship-part-1-screencast-saclaw-org/)

Related Video

• Petition for Guardianship of the Person, (https://www.saclaw.org/video-library/applying-for-guardianship-part-1-screencast-saclaw-org/)
Parts 1-4

Probate Calendar Notes may be viewed for free online at on <u>Sacramento County Superior Court's Public Portal</u> (https://prod-portal-sacramento-ca.journaltech.com/public-portal/). You may search the notes by your case number or your hearing date.

Home My Notification Requests Court Reservations Searches Civil Readiness Trial

Search

The Superior Court of California, County of Sacramento, provides online access to civil and probate case records (do information) through the Public Portal. The portal does not include information about Criminal, Juvenile, or Traffic

There are several ways to find case information in the Public Portal:

- Name Search: for Civil cases filed from 1996 to present, and Probate cases filed 2007 to present. Search by name to case numbers and filing dates matching the party name entered, if the information is available. Click a case number to case information.
- Calendar Search: for Civil cases filed from 1996 to present, and Probate cases filed 2007 to present. Select a date a
 location, and see calendars for departments at the selected location.
- * Case Number Search: Search by Case Number to view the parties to a case, documents, actions, minutes, future he
- * My Previous Filings: Locate court reservations in your account.
- * Public Reports (Filings) Search: Locate all non-confidential cases filed on any given day, by location and case type. S are limited to a 5-day search window.

Home page of Sacrmento's Public Portal website.

Once you log in and find your case, you will see a list of documents filed in your case, including any Probate Notes available.



Home	My Case	Activity	Notifications	•	Court
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24-PR-001234 GUARDIANSHIP OF JOHNNY DO **Probate** (Guardianship - Person)

Filed 01-02-2024

Case Summary

Documents

Register of Actions

Part

Filed / Status Date	Name
04-18-2024	Minute Order (General (

04-13-2024 Probate Calendar Notes

04-18-2024

Minute Order (General)

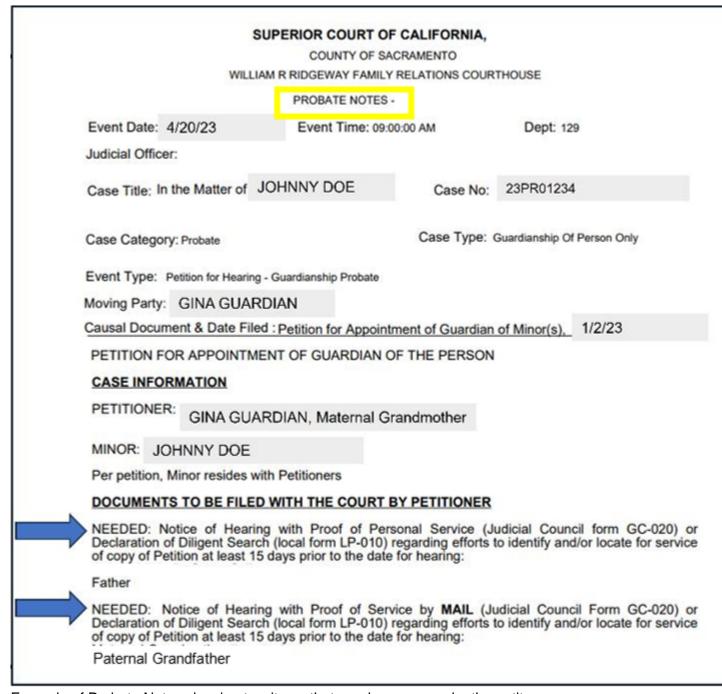
SACRAMENTO COUNTY PUBLIC LAW LIBRARY



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Example of Probate Case File with Probate Calendar Notes

Your Probate Calendar Notes will contain a number of informational notations that require no response. However, if any of the items are listed as "NEEDED;" a response must be prepared and filed. These responses must include (1) the specific note that is "NEEDED," (2) a response to the note, and (3) any requested documents that need to be filed with the court.



Example of Probate Notes showing two items that need a response by the petitoner.

To respond to the Probate Calendar Notes for a guardianship case in Sacramento County, you must use the form *Response to Calendar Notes* (Sacramento County Local Form PR-E-LP-022).

Once your written response is complete, file the original (unstapled), plus two stapled copies, at the Probate Filing Counter in Room 214 at the William R. Ridgeway Family Relations Courthouse. The court will keep the

original and one copy and return one stamped "Endorsed/Filed" to you. Be sure to bring this endorsed copy with you to all of your court hearings.

Step-by-Step Instructions

1

Complete the Required Forms

Instructions for completing the necessary form are included at the end of this guide. You must use the following form in order to respond to your Probate Calendar Notes:

Response to Calendar Notes (https://www.saccourt.ca.gov/forms/docs/pr-022.pdf) (Sacramento County Local Form PR-E-LP-022)

2

Copying and Assembling

Make two copies of your Response to Calendar Notes. Leave your original unstapled, but staple each copy.

In the Sacramento County Superior Court, because documents are scanned into a computer, any multiplepage original documents are left unstapled, while each copy is stapled.

3

Filing

Your Response to Calendar Notes must be filed at Probate Front Counter in Room 214 at the William R. Ridgeway Family Relations Courthouse. The court will keep the original and one copy and return one stamped "Endorsed/Filed" to you. Bring the endorsed copy to all of your court hearings. There is no fee for filing your response to Calendar Notes.

For Help

SH@LL (Self-Help at the Law Library) (https://saclaw.org/services/civil-self-help/)

609 9th Street, Sacramento CA 95814

(916) 476-2731 (Appointment Request Line)

SACRAMENTO COUNTY PUBLIC LAW LIBRARY



609 9th St Sacramento, CA 95814 | 916-874-6012 | saclaw.org

Services Provided: SH@LL provides general information and basic assistance to self-represented litigants on a variety of legal issues. All assistance is provided by telephone. Visit "What we can help with (https://saclaw.org/services/civil-self-help/#canhelp)" for a list of qualifying cases.

Eligibility: Must be a Sacramento County resident or have a <u>qualifying case (https://saclaw.org/services/civil-self-help/#who)</u> in the Sacramento County Superior Court.

For More Information

On the Web:

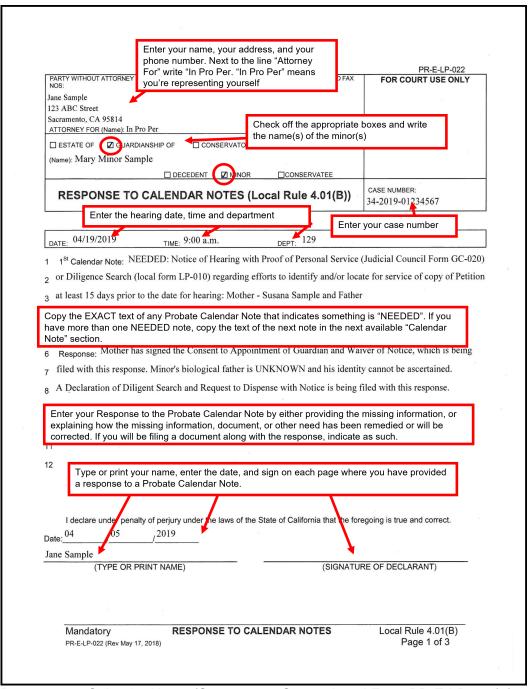
Local Rules 4.01 and 4.02, (http://www.saccourt.ca.gov/local-rules/docs/chapter-04.pdf) Sacramento County Superior Court

About Probate Calendar Notes, (https://www.saccourt.ca.gov/probate/about-notes.aspx) Sacramento County Superior Court

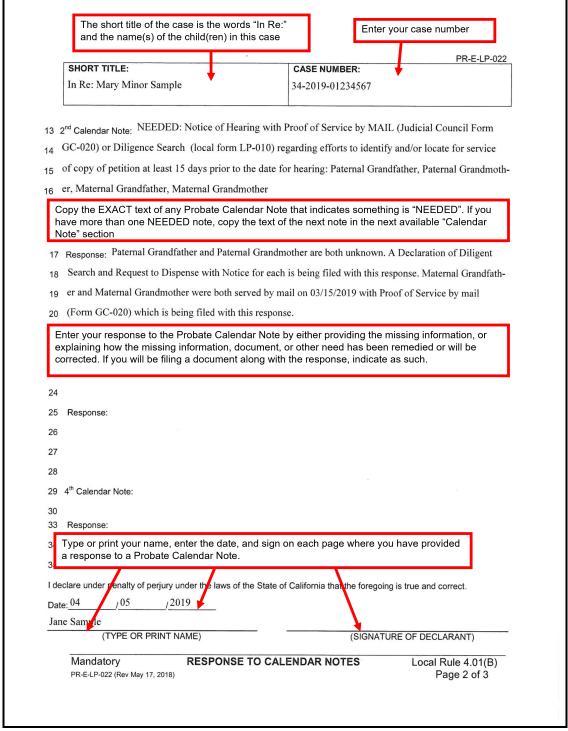
At the Law Library:

The Guardianship Book for California KFC 134 .B76 (Self Help)

Samples



Response to Calendar Notes (Sacramento County Local Form PR-E-LP-022) (page 1)



Response to Calendar Notes (Sacramento County Local Form PR-E-LP-022) (page 2)

	PR-E-LP-022
SHORT TITLE: In Re: Mary Minor Sample	CASE NUMBER: 34-2019-01234567
,	34-2019-01234307
36 5th Calendar Note:	
37	
38	
	alendar Notes indicating something is "NEEDED", use all the spaces he Probate Calendar Note and respond to the note appropriately
40 R If you have already copied the text of	f all Probate Calendar Notes indicated something is "NEEDED" and
responded to the Probate Calendar N	Note, leave these blank.
42	
43	
44 6th Calendar Note:	
45	
46	
47	
48 Response:	
49	
50	
51	
52 7th Calendar Note:	
53	
54	
55	
56 Response:	name, enter the date, or sign a page where you have
not responded to a Probate	
58	
I declare under penalty of perjury under the laws	s of the State of California that the foregoing is true and correct.
Date:/	
(TYPE OR PRINT NAME)	(SIGNATURE OF DECLARANT)
Mandatory RESPON	NSE TO CALENDAR NOTES Local Rule 4.01(B)

Response to Calendar Notes (Sacramento County Local Form PR-E-LP-022) (page 3)