

FILED
San Francisco County Superior Court

JUN 28 2021

CLERK OF THE COURT
BY: Almagedon
Deputy Clerk

SUPERIOR COURT OF THE STATE OF CALIFORNIA
FOR THE COUNTY OF SAN FRANCISCO

IN RE: ADMINISTRATIVE ORDER OF THE
PROBATE AND MENTAL HEALTH
DIVISION RE COVID-19 PANDEMIC

TENTH AMENDED GENERAL ORDER
OF THE PROBATE AND
MENTAL HEALTH DIVISION

The Probate and Mental Health Division issues this Tenth Amended General Order in order to inform counsel, parties and the public of current protocols for filing documents, providing courtesy copies, lodging proposed orders, and the conduct of hearings. Additionally, in order to avoid delay, the court encourages parties to provide additional information in hearing notices. Existing rules, including the Rules of Court and Local Rules, remain in force. This Order augments those rules. This Order AMENDS and SUPERSEDES the Ninth Amended General Order of the Probate and Mental Health Division, signed and filed February 10, 2021.

Important changes from the Ninth Amended General Order include:

- Clarifying filing and lodging protocols;
- Revising hearing protocols; and,
- Recommending that counsel and parties provide notice of remote hearing options.

A. New Documents in Trust and Estate Matters; Recommendation re Additional Notice

Generally, trust and estate matters are governed by the e-filing and e-service rules. (See LRSF 2.11 & 14.60.) For e-filing and e-service protocols, see LRSF 2.11.

Self-represented parties in trust and estate matters are not subject to the e-filing and e-service

1 requirements (see LRSF 2.11 & 14.60), but they may opt in to e-filing and e-service (see LRSF
2 14.60(D)). Self-represented parties who have not opted in to e-filing and e-service must submit their
3 documents for conventional filing. Such self-represented parties may conventionally file their documents
4 by: (1) depositing them in the secure Probate drop box in the lobby of the Civic Center Courthouse
5 between 8:30 a.m. and 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400 McAllister,
6 Room 103; San Francisco, CA 94102; or (3) personally delivering them at the Probate window in Room
7 103 on court days between 8:30 a.m. and 12:30 p.m. The party may satisfy the courtesy-copy
8 requirement by including enough copies to allow the clerk to route a complete set of the documents to the
9 hearing department. If enough additional copies of the filing and a postage-paid, self-addressed envelope
10 are provided, the clerk will return endorsed-filed copies by mail.

11 With their notice of hearing, petitioning parties should include notice of the procedures for remote
12 appearances via Zoom and CourtCall, as set out below.

13 For all estate and trust matters, endorsed-filed courtesy copies and proposed orders must be lodged
14 within the deadlines set forth in the Local Rules.

15 **B. Hearings on Trust and Estate Petitions**

16 Regular trust and estate calendars are heard on non-holiday Mondays, Tuesdays and Wednesdays
17 at 9:00 a.m. in Department 204. Counsel and parties may appear personally or remotely through Zoom or
18 CourtCall.

19 For a video appearance, go to zoom.us, click “join a meeting” and input meeting ID 875 8017
20 7925 and password 722809. For an audio-only telephone appearance through Zoom, call 1-669-900-6833
21 and key in meeting ID “875 8017 7925#”, then participant ID “0#”, then password “722809#”. (Toll rates
22 may apply.) The court prefers that counsel and parties appear by video and that they input their first and
23 last name into the “Your Name” dialogue box.

24 Counsel and parties may appear by audio-only telephone through CourtCall by calling CourtCall
25 at 1-888-882-6878 and obtaining an appearance access code for the hearing’s scheduled date and time in
26 department 204. The requirement for advance permission to appear by CourtCall is suspended until
27 further notice. A CourtCall appearance may be made by mobile phone. A CourtCall appearance may
28 require payment of a fee, even for parties with fee waivers.

Counsel or parties appearing in person must wear a mask covering their nose and mouth at all
times while in the courthouse.

Members of the public may observe a trust or estate calendar personally or through Zoom or
CourtCall. Any person observing in person must wear a mask covering their nose and mouth at all times

1 while in the courthouse. For video access, go to zoom.us, click “join a meeting” and input meeting ID
2 875 8017 7925 and password 722809. For audio-only telephone access through Zoom, call 1-669-900-
3 6833 and key in meeting ID “875 8017 7925#”, then participant ID “0#”, then password “722809#”.
4 (Toll rates may apply.) For audio-only access through CourtCall, call the mute public line for Department
5 204 at 1-415-796-6280 and enter access code 12129865#. This line will allow a member of the public to
6 listen to the proceedings; it will not support an attempt to appear before the court. Neither the public
7 access line nor the Zoom link will be available for closed proceedings.

8 **C. New Documents in Probate Conservatorship and Guardianship Proceedings;
9 Recommendation re Additional Notice**

10 Counsel and self-represented parties in probate conservatorship and guardianship proceedings
11 must submit all papers for conventional filing. Papers may be conventionally filed by: (1) depositing
12 them in the secure Probate drop box in the lobby of the Civic Center Courthouse between 8:30 a.m. and
13 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400 McAllister, Room 103; San
14 Francisco, CA 94102; or (3) personally delivering them at the Probate window in Room 103 on court
15 days between 8:30 a.m. and 12:30 p.m. Counsel and parties may satisfy the courtesy-copy requirement
16 by including enough copies to allow the clerk to route a complete set of the documents to the hearing
17 department. If enough additional copies of the filing and a postage-paid, self-addressed envelope are
18 provided, the clerk will return endorsed-filed copies by mail.

19 With their notice of hearing, petitioning parties should include notice of the procedures for remote
20 appearances via Zoom and CourtCall, as set out below.

21 Endorsed-filed courtesy copies and proposed orders must be lodged within the deadlines set forth
22 in the Local Rules.

23 Counsel or any self-represented party seeking to have a petition for appointment of a guardian or
24 conservator specially set must email ProbateCGspecialset@sftc.org to obtain approval of the special
25 setting prior to filing the subject petition.

26 **D. Dedicated Probate Conservatorship and Guardianship Calendars**

27 Dedicated probate conservatorship calendars are heard on Thursdays at 9:00 a.m. in Department
28 204 and dedicated guardianship calendars are heard on Tuesdays at 1:30 p.m. in Department 204.
Counsel and parties may appear personally or remotely through Zoom or CourtCall. Parties are
encouraged to contact the assigned court investigator or, if none, the Acting Assistant Probate Director at
1-415-551-3868 to determine whether any non-remote personal appearance is required.

1 Counsel and parties may appear by video or audio-only telephone through Zoom. For a video
2 appearance, go to zoom.us, click “join a meeting” and input meeting ID 875 8017 7925 and password
3 722809. For an audio-only telephone appearance through Zoom, call 1-669-900-6833 and key in meeting
4 ID “875 8017 7925#”, then participant ID “0#”, then password “722809#”. (Toll rates may apply.) The
5 court prefers that counsel and parties appear by video and that they input their first and last name into the
6 “Your Name” dialogue box.

7 Counsel and parties may appear by audio-only telephone through CourtCall by calling CourtCall
8 at 1-888-882-6878 and obtaining an appearance access code for the hearing’s scheduled date and time.
9 The requirement for advance permission to appear by CourtCall is suspended until further notice. A
10 CourtCall appearance may be made by mobile phone. A CourtCall appearance may require payment of a
11 fee, even for parties with fee waivers.

12 Counsel or parties appearing in person must wear a mask covering their nose and mouth at all
13 times while in the courthouse.

14 Members of the public may observe a probate conservatorship or guardianship calendar personally
15 or through Zoom or CourtCall. Any person observing in person must wear a mask covering their nose
16 and mouth at all times while in the courthouse. For video access, go to zoom.us, click “join a meeting”
17 and input meeting ID 875 8017 7925 and password 722809. For audio-only telephone access through
18 Zoom, call 1-669-900-6833 and key in meeting ID “875 8017 7925#”, then participant ID “0#”, then
19 password “722809#”. (Toll rates may apply.) For audio-only access through CourtCall, call the mute
20 public line for Department 204 at 1-415-796-6280 and enter access code 12129865#. This line will allow
21 a member of the public to listen to the proceedings; it will not support an attempt to appear before the
22 court. Neither the public access line nor the Zoom link will be available for closed proceedings.

23 **E. Drop-Off Ex Parte Petitions in All Matters Before the Probate Department**

24 Drop-off ex parte proceedings are reserved for routine and/or non-adversarial requests. For trust
25 and estate matters, self-represented parties who have opted in to e-filing and all counsel must e-file their
26 drop-off ex parte petition. All such parties must promptly deliver hard-copy, endorsed-filed courtesy
27 copies and a proposed order to the court by: (1) depositing them in the secure Probate drop box in the
28 lobby of the Civic Center Courthouse between 8:30 a.m. and 4:00 p.m. on court days; (2) mailing them to:
Probate Department; 400 McAllister, Room 103; San Francisco, CA 94102; or (3) personally delivering
them at the Probate window in Room 103 on court days between 8:30 a.m. and 12:30 p.m.

Self-represented parties in estate and trust matters who have not opted in to e-filing must submit
their drop-off ex parte petition for conventional filing. Such self-represented parties may conventionally

1 file their papers by: (1) depositing them in the secure Probate drop box in the lobby of the Civic Center
2 Courthouse between 8:30 a.m. and 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400
3 McAllister, Room 103; San Francisco, CA 94102; or (3) personally delivering them at the Probate
4 window in Room 103 on court days between 8:30 a.m. and 12:30 p.m. The self-represented party must
5 include enough copies to allow the clerk to route an endorsed-filed courtesy copy of all papers to the
6 hearing department; such parties must include a proposed order, as well. If enough additional copies of
7 the filing and a postage-paid, self-addressed envelope are provided, the clerk will return endorsed-filed
8 copies by mail.

9 In a guardianship or conservatorship case, any drop-off ex-parte petition must be submitted for
10 conventional filing. Counsel and self-represented parties may conventionally file their documents by: (1)
11 depositing them in the secure Probate drop box in the lobby of the Civic Center Courthouse between 8:30
12 a.m. and 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400 McAllister, Room 103;
13 San Francisco, CA 94102; or (3) personally delivering them at the Probate window in Room 103 on court
14 days between 8:30 a.m. and 12:30 p.m. Counsel and parties must include enough copies to allow the
15 clerk to route an endorsed-filed courtesy copy of all documents to the hearing department; petitioning
16 parties must submit a proposed order, as well, for routing to the hearing department. If enough additional
17 copies of the filing and a postage-paid, self-addressed envelope are provided, the clerk will return
18 endorsed-filed copies by mail.

19 Any party filing papers in opposition to a drop-off ex parte petition must follow the procedure set
20 out above for filing the initial ex parte petition, including the requirement to include enough copies to
21 allow the clerk to deliver an endorsed-filed copy of all documents to the hearing department.

22 If a self-addressed envelope with appropriate postage is provided, a copy of any signed order will
23 be returned by mail.

24 **F. Appearance Ex Parte Petitions in All Matters Before the Probate Department**

25 Appearance ex parte petitions are heard Monday through Friday at 10:00 a.m. and 10:30 a.m., as
26 calendared by the clerk. Appearance ex parte proceedings are designed to afford relief on an essentially
27 emergency basis and such petitions should be accompanied by competent evidence justifying immediate
28 judicial action.

29 **1. Filing Appearance Ex Parte Petitions, Obtaining Hearing Date and Time and 30 Providing Courtesy Copies; Recommendation re Additional Notice**

31 Self-represented parties who have opted in to e-filing and all counsel must e-file their appearance
32 ex parte petition. Such parties will receive a confirmation from File & Serve Xpress, at which point they

1 must go to the court's electronic register of actions, click on the endorsed-filed ex parte document(s) to
2 see the hearing date and time. Such parties must then serve their papers, as appropriate, and promptly
3 lodge with the court hard-copy, endorsed-filed courtesy copies (printed from the ROA) and a proposed
4 order. These lodgings may be accomplished by: (1) depositing the papers in the secure Probate drop box
5 in the lobby of the Civic Center Courthouse between 8:30 a.m. and 4:00 p.m. on court days; (2) mailing
6 them to: Probate Department; 400 McAllister, Room 103; San Francisco, CA 94102; or (3) personally
7 delivering them at the Probate window in Room 103 on court days between 8:30 a.m. and 12:30 p.m.

8 If the case is a probate conservatorship or guardianship or the appearance ex parte petition is filed
9 by a self-represented party who has not opted in to e-filing, counsel or the party must submit their
10 appearance ex parte petition for conventional filing. Counsel and parties may conventionally file their
11 documents by: (1) depositing the papers in the secure Probate drop box in the lobby of the Civic Center
12 Courthouse between 8:30 a.m. and 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400
13 McAllister, Room 103; San Francisco, CA 94102; or (3) personally delivering them at the Probate
14 window in Room 103 on court days between 8:30 a.m. and 12:30 p.m. Such counsel or party must
15 include enough copies to allow the clerk to route courtesy copy of each document to the hearing
16 department; petitioning parties must include a proposed order, as well. If enough additional copies of the
17 filing and a postage-paid, self-addressed envelope are provided, the clerk will return endorsed-filed copies
18 by mail.

19 The hearing date and time will be stamped on the endorsed-filed petition and entered into the
20 case's calendared hearings in the electronic register of actions. Parties may check for both filed petitions
21 and calendar assignments on the court's website at <https://sfsuperiorcourt.org/>.

22 With their notice of hearing, petitioning parties should include notice of the procedures for remote
23 appearances via Zoom and CourtCall, as set out below.

24 Any party filing opposing papers must comply with the applicable filing requirements for the
25 appearance ex parte petition, including the courtesy-copy requirements.

26 Counsel or any self-represented party petitioning for an order that requires letters must deliver
27 proposed letters bearing original signatures and a self-addressed stamped envelope with appropriate
28 postage for the letters to be returned by mail. If counsel or the self-represented party requires certified
letters, they must include enough copies and a check in a sufficient amount for the court certification fees.
The check should be made out to San Francisco Superior Court.

2. The Appearance Ex Parte Hearing and Obtaining Signed Orders

Parties may appear personally or by video or audio-only telephone through Zoom.

For a video appearance, go to zoom.us, click "join a meeting" and input meeting ID 340 967 5499

1 and password 554715. For an audio-only telephone appearance through Zoom, call 1-669-900-6833 and
2 key in meeting ID “340 967 5499#”, then participant ID “0#”, then password “554715#”. (Toll rates may
3 apply.)

4 Parties may appear by audio-only telephone through CourtCall by calling CourtCall at 1-888-882-
5 6878 and obtaining an appearance access code for the hearing’s scheduled date and time in room 202.
6 The requirement for advance permission to appear by CourtCall is suspended until further notice. Any
7 party may make a CourtCall appearance by mobile phone. A CourtCall appearance may require payment
8 of a fee, even for parties with fee waivers.

9 Counsel or parties appearing in person must wear a mask covering their nose and mouth at all
10 times while in the courthouse.

11 For an ex parte petition for appointment of a temporary conservator or temporary guardian, the
12 court may require that the petitioner and either the proposed conservatee or the proposed ward(s), as the
13 case may be, personally appear in Department 202. Parties are encouraged to contact the assigned court
14 investigator or, if none, the Acting Assistant Probate Director at 1-415-551-3868 to determine whether
15 any non-remote personal appearance is required.

16 If a self-addressed envelope with appropriate postage is provided, a copy of any signed order will
17 be returned. Otherwise, a scanned digital copy of the signed order will be available on the court’s
18 electronic register of actions.

19 **G. Law & Motion in All Matters Before the Probate Department**

20 The Probate Department schedules Law & Motion matters for hearing on Wednesdays and
21 Thursdays at 2:00 p.m. and 2:30 p.m., and Fridays at 9:00 a.m. A hearing reservation is required. For
22 protocols for reserving a hearing date and time, see LRSF 14.10(A).

23 **1. Filing Motion-Related Documents and Providing Courtesy Copies; 24 Recommendation re Additional Notice**

25 All motions filed in a trust or estate matter by counsel or a self-represented party who has opted in
26 to e-filing must be e-filed. All documents related to such motions, including oppositions and replies, must
27 be e-filed, except for documents filed by a self-represented party not subject to e-filing requirements,
28 which must be filed as set forth below. Counsel and self-represented parties subject to e-filing
requirements must promptly deliver hard-copy, endorsed-filed courtesy copies of any documents; moving
parties must deliver a proposed order, as well. This may be accomplished by: (1) depositing the
documents in the secure Probate drop box in the lobby of the Civic Center Courthouse between 8:30 a.m.
and 4:00 p.m. on court days; (2) mailing them to: Probate Department; 400 McAllister, Room 103; San

1 Francisco, CA 94102; or (3) personally delivering them at the Probate window in Room 103 on court
2 days between 8:30 a.m. and 12:30 p.m.

3 Trust and estate self-represented parties not subject to e-filing requirements, as well as all counsel
4 and self-represented parties in probate conservatorship or guardianship proceedings, must submit any
5 motion or motion-related documents, including an opposition or reply, for conventional filing. Such
6 counsel or self-represented parties may conventionally file their documents by: (1) depositing them in the
7 secure Probate drop box in the lobby of the Civic Center Courthouse between 8:30 a.m. and 4:00 p.m. on
8 court days; (2) mailing them to: Probate Department; 400 McAllister, Room 103; San Francisco, CA
9 94102; or (3) personally delivering them at the Probate window in Room 103 on court days between 8:30
10 a.m. and 12:30 p.m. Such counsel or parties must include enough copies to allow the clerk to route two
11 (2) endorsed-filed courtesy copies of each document to the hearing department. If enough additional
12 copies of the filing and a postage-paid, self-addressed envelope are provided, the clerk will return
13 endorsed-filed copies by mail to the filing party.

14 With their notice of hearing, petitioning parties should include notice of the procedures for remote
15 appearances via Zoom and CourtCall, as set out below.

16 Endorsed-filed courtesy copies and proposed orders must be lodged by the specific deadlines set
17 forth in the Local Rules.

18 **2. The Motion Hearing**

19 Parties may appear personally or by video or audio-only telephone through Zoom.

20 For a video appearance, go to zoom.us, click “join a meeting” and input meeting ID 875 8017
21 7925 and password 722809. For an audio-only telephone appearance through Zoom, call 1-669-900-6833
22 and key in meeting ID “875 8017 7925#”, then participant ID “0#”, then password “722809#”. (Toll rates
23 may apply.) The court prefers that counsel and parties appear by video and that they input their first and
24 last name into the “Your Name” dialogue box.

25 Parties may appear by audio-only telephone through CourtCall by calling CourtCall at 1-888-882-
26 6878 and obtaining an appearance access code for the hearing’s scheduled date and time. The
27 requirement for advance permission to appear by CourtCall is suspended until further notice. Any party
28 may make a CourtCall appearance by mobile phone. A CourtCall appearance may require payment of a
fee, even for parties with fee waivers.

Counsel or parties appearing in person must wear a mask covering their nose and mouth at all
times while in the courthouse.

Members of the public may observe a motion calendar personally or through Zoom or CourtCall.
Any person observing in person must wear a mask covering their nose and mouth at all times while in the

1 courthouse. For video access, go to zoom.us, click “join a meeting” and input meeting ID 875 8017 7925
2 and password 722809. For audio-only telephone access through Zoom, call 1-669-900-6833 and key in
3 meeting ID “875 8017 7925#”, then participant ID “0#”, then password “722809#”. (Toll rates may
4 apply.) For audio-only access through CourtCall, call the mute public line for Department 204 at 1-415-
5 796-6280 and enter access code 12129865#. This line will allow a member of the public to listen to the
6 proceedings; it will not support an attempt to appear before the court. Neither the public access line nor
7 the Zoom link will be available for closed proceedings.

8 **H. Evidentiary Hearings and Trials**

9 Evidentiary hearings and trials in trust and estate, guardianship and probate conservatorship
10 matters will continue to be set and assigned according to the time estimate. (See LRSF 14.5(E).) All
11 parties are to meet and confer regarding remote conduct of evidentiary hearings and trials. The bench
12 officer conducting the evidentiary hearing will establish the appropriate protocol for the hearing or trial
13 based on the specific circumstances, including the parties’ views regarding remote proceedings.

14 **I. LPS Proceedings**

15 The court conducts certification hearings, *Riese* hearings and Probate Code section 3200 hearings
16 as needed. The court conducts its LPS calendars on non-holiday Thursdays starting at 9:00 a.m.

17 The hearing officer may, at his or her discretion, conduct certification and *Riese* hearings, as well
18 as Probate Code section 3200 hearings, in person or remotely by video or telephone. Temporary
19 conservatorships sought under the LPS Act will be considered on a rolling basis.

20 Absent an order of the court otherwise, all noticed hearings will be conducted in Department 622
21 of the Civic Center Courthouse, at 400 McAllister Street, San Francisco, California 94102. Hearings may
22 be conducted by video or telephone, subject to appropriate requirements.

23 CIPP and AOT status hearings are heard on non-holiday Thursdays starting at 9:15 a.m. Such
24 hearings may be conducted remotely by video or telephone, subject to appropriate requirements.

25 **J. Remote Hearings and the Rules of Conduct**

26 Remote hearings are formal court proceedings. During remote hearings, you are in the presence of
27 the court. The standards of conduct that apply to personal appearances apply to remote hearings. Those
28 standards include the prohibition against making an audio, video or electronic recording of the hearing
without prior order from the court; doing so is illegal and punishable by fine or any sanction the court
deems appropriate.

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2 **K. Remote Hearing Participation in Event of Internet or Zoom Outage**

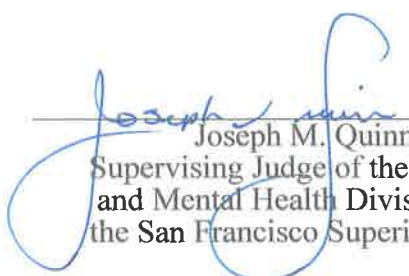
3 In the event that your internet or Zoom connection is down or an electronic connection to the
4 courtroom is not available, parties and counsel appearing remotely must promptly take steps to appear
5 personally or by audio-only telephone through CourtCall by calling CourtCall at 1-888-882-6878,
6 obtaining an appearance access code for the hearing and connecting to the hearing. Once connected,
7 parties and counsel should speak up and make their appearance when you hear the clerk call the matter. A
8 CourtCall appearance may require payment of a fee, even for parties with fee waivers.

9 **L. The Court's ACCESS Center Is Open**

10 Self-represented parties in probate conservatorship-of-person and guardianship-of-person
11 proceedings may obtain self-help services through the court's ACCESS Center. For more information go
12 to <https://sfsuperiorcourt.org/> and click on the "Self-Help" tab on the top row.

13 IT IS SO ORDERED.

14 DATED: June 28, 2021

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16 Joseph M. Quinn
17 Supervising Judge of the Probate
18 and Mental Health Division of
19 the San Francisco Superior Court
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