

Local Form Updates and Other Volume Enhancements on this CD

This update contains significant updates and enhancements for nearly every ProDoc volume. We revised more than 550 forms. The majority of the revised forms are due to county changes to local forms. We also added more than 675 new forms in existing and new ProDoc volumes (see below). Many of the new forms are mandatory. Here is an overview of the changes to the volumes.

Attorney Client - You now have the option to fill in the Report to the Judicial Council: Superior Court Records Destroyed, Preserved, and Transferred. Previously, we provided it for informational purposes.

Conservatorships – We updated 20 local forms and added five new mandatory local forms. The other form changes include: (1) modifying forms for additional conservator affirmation signatures for *Letters of Conservatorship* and *Letters of Temporary Conservatorship* and (2) modifying how the character and estimated value of the property of the estate data is captured and displayed in the attachments for each conservator.

Criminal – We updated 28 local forms and added 19 new mandatory local forms. Several of the form updates included converting forms that were formerly informational only, into fillable forms.

Family Law – We added 54 new forms to this volume with 39 of them being mandatory. We also: (1) changed 31 local forms from print/information only to fillable in ProDoc, (2) updated 47 local forms based on local changes, (3) updated IRS Form 8332 (our 9-170) pursuant to IRS changes, (4) made changes to eight forms for aesthetic purposes, and (5) we made minor

(continued on page 2)

Install this Update Immediately

This update contains form updates that are effective immediately. Please be sure to install it NOW so you don't forget to do so later.

Your ProDoc Installation KeyCode Is on the Shipping Envelope

You will need a 20-character **KeyCode** to install this update. You'll find it on the envelope in which the CD shipped. We strongly encourage you to keep the shipping envelope in a safe place so you have your KeyCode available when you install the update.

Two New ProDoc Volumes

We released two new volumes with this update. View the chart on page three to see which libraries now include these volumes:

Federal Civil Litigation – Our Federal Civil Litigation volume contains Administrative Office of the U.S. Courts forms for litigation, Ninth Circuit Court of Appeals Forms, and local court forms for every federal district in California.

Federal Criminal Defense - Our Federal Criminal Defense volume contains more than 220 automated forms, including Administrative Office of the U.S. Courts forms for litigation, Criminal Justice Act forms, and local court forms for every Federal District in California. Additionally, it contains a significant number of useful word-processor-based text forms that are not available in LSI. These include letters, motions, pleas, waivers, demands, responses, and stipulations.

PowerPacks Are Now Free

We added the PowerPacks into their respective parent volumes, at no charge to you, for the following volumes: Family Law, Probate, Guardianships, and Conservatorships.

If your subscription includes any of the above volumes, you will find that you have access to those PowerPacks after you install this update. And, if you have been charged in the past for subscribing to the PowerPacks, those fees dropped from your billing effective August 1, 2009.

Additionally, customers have strongly encouraged us to add the Conservatorships and Guardianships volumes to the Estate Planning Library. So, if you are subscribed to the ProDoc Estate Planning Library, you will find that these two volumes are now available to you after you install the update.

Visit tinyurl.com/ca-powerpacks for information about using the PowerPacks.

corrections to the El Dorado County *Subpoena So as Not to Assign*. Finally, we deleted the *Claim for Reassessment Reversal for Registered Domestic Partners* forms in Sonoma, San Bernardino, and Alameda counties.

Guardianships – We updated 14 local forms update and added 12 new mandatory local forms. We also modified forms for additional guardian affirmation signatures for the *Letters of Guardianship* and *Letters of Temporary Guardianship*.

Juvenile – We added five new mandatory local forms and nine new local Certification of Attorney Competency forms for the counties now requiring them. We also changed 135 local and Judicial Council Forms from print/information only to fillable; and others were revised in accordance with local forms updates. We retitled form 133-220, formerly titled *Stipulation to ADR* to *ADR Certification and Selection*. Finally, we renumbered the *Stipulation to ADR Provider* as 133-210.

Landlord and Tenant – We added two new forms and revised eight in accordance with local forms update.

Lipman’s Wills & Trusts – We revised a number of forms as follows:

1. We added the option to add several pages of trustee’s powers provisions to each of the *Certification of Trust* forms that can be drafted in conjunction with the revocable and irrevocable trusts.
2. We made changes in the Husband and Wife simple wills and in the individually created Husband and Wife revocable trusts. These forms now work better when the spouses are creating *Supplemental Needs Trusts* (SNTs) for each other, rather than for some other person. In addition, we made changes to the transmittal letter so that better wording will appear when spouses create SNTs for each other.
3. We added a new question to the Will and Revocable Trust forms for instances when you want to add a No Contest clause. You now have the option to state that the No Contest clause will be unenforceable if the contest is brought and maintained in good faith and if probable cause exists for bringing the contest.

Litigation – We revised more than 50 forms and added 16, 13 of the new forms are mandatory, in accordance with local forms update. Revisions to the forms include: (1) form CM-200 modified to allow users to add date of settlement and date for a request for dismissal, (2) form CIV-050 modified to allow

View the Specific Changes to a Particular Form in a Volume

Here’s how you can view the specific changes to a particular form in a ProDoc volume of this update:

Open ProDoc and click on **Help**→ **About the Volumes**. Then click the volume of your choice. You will now see a page with three links at the top: **Authors**, **Change History**, and **Forms List**.

Click on the **Change History** link and you will see information about the changes made to each form in this update.

Additionally, by clicking on the **Forms List** link instead of the Change History link, you will view a complete list of all of the forms in the selected volume.

View the Forms Lists

With all the changes we made to ProDoc volumes, perhaps you would like to view the revised forms lists. Go to tinyurl.com/pd-ca-forms-lists, click on the link to the forms list for the volume you wish to view, and you will be able to view and/or print that forms list.

users to add the name of the person to be served and a date the proof of service will be signed, (3) form CV-100 modified to allow users to correctly enter the balance of costs, (4) form DISC-020 modified to allow users more space for each fact entry and each document entry in the *Requests for Admission*, (5) form MC-011 enhanced per customer request to allow users to calculate the subtotal without filling out all of the data fields, and (6) form 132-105 modified to increase the field size so users can list more than one party per user call. Finally, we deleted the *Order to Amend Name after Judgment* (SUPCS-028), a form discontinued by Santa Clara County.

Probate – We updated 38 forms and added 19 new forms, three of them mandatory, in accordance with local forms updates. We added an instructions page for Birth/Death records in Fresno County. Finally, we moved six forms to our Real Estate volume, including: *Change for Reassessment Exclusion (Parent to Child and Grandparent)* in Riverside, San Bernardino, and Santa Barbara counties and removed the *Declaration* in Sacramento County in accordance with the county

web site update.

Real Estate – We updated 152 forms and added 106 new forms in accordance with local forms updates. We also added numerous State Board of Equalization (BOE) forms across several counties. New local forms include: *Application for Reassessment of Property Damage* - Santa Barbara County, *Assessment Review Request (Prop 8)* – Solano County, and *Request for Decline in Market Value Reassessment (Prop 8)* – Sonoma County. Changes to the forms include: (1) removal of the statutory reference in first paragraph of

form 4-020, (2) modified form 126-175 to allow users to enter total number of persons being rehabilitated who were housed on the premises in December, (3) and modified the attachment for form 149-170 to increase the number of entries for locations which can be claimed as exemptions.

Workers' Compensation - We added, per customer requests, the following non-EAMS and non-legacy forms: *Subpoena*, *Subpoena Duces Tecum*, *Declaration Pursuant to Labor Code Section 4906(g)*, and *Fee Disclosure Statement*.

Revised ProDoc Libraries Chart

The following chart provides you a quick view of the changes we made to the ProDoc libraries. The library changes are highlighted.

Volumes	Libraries					
	General Practice	Office Practice	Estate Planning	Family Law	Litigation	Workers' Compensation
Attorney Client	✓	✓	✓	✓	✓	✓
Family Law	✓	✓		✓		
Lipman's Wills & Trusts			✓			
Probate	✓	✓	✓			
Real Estate	✓	✓				
Litigation	✓				✓	
Conservatorships	✓	✓	✓			
Guardianships	✓	✓	✓			
Criminal Defense	✓	✓				
Juvenile	✓	✓				
Landlord and Tenant	✓	✓				
Federal Criminal Defense	✓	✓				
Federal Civil Litigation	✓				✓	
Workers' Compensation	✓					✓
Wills	✓	✓	✓			
PowerPacks	General Practice	Office Practice	Estate Planning	Family Law	Litigation	Workers' Compensation
Family Law	✓	✓		✓		
Conservatorships	✓	✓	✓			
Guardianships	✓	✓	✓			
Probate	✓	✓	✓			