

Probate eFiling Tips

| Document | Process |
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| Guardianship SIJS | Guardianship SIJS – When the filing party is the Proposed Ward use Proposed Ward – New Case for the Filed By Party Role and Proposed Guardian – New Case for the As To Party Role. |
| Fee Waivers | In Guardianship cases when there are more fee waivers (one required for each Proposed Ward) than number of filing parties (Proposed Guardians) the additional Request to Waive Court Fees (Ward or Conservatee) must be added as an additional document. Selecting Request to Waive Court Fees as the filing document will result in a rejection as the filing document must be Request to Waive Court Fees (Ward or Conservatee FW-001-GC). |
| Fee Waivers | A Fee Waiver is required for each Proposed Ward or Proposed Conservatee in Guardianship and Conservatorship cases. When there are fewer fee waivers than number of filing parties (i.e. 2 Proposed Guardians/Conservators and only 1 Proposed Ward/Conservatee) upload the same Request to Waive Court Fees for each filing party. Only one Order to Waive Court Fees is required. This is a workaround to ensure that additional fees are not charged. |
| New Party Filing Fee Waiver | When a new party is filing a fee waiver with documents other than a Petition for Appointment on an existing Guardianship or Conservatorship case use Request to Waive Court Fees FW-001, <u>not</u> Request to Waive Court Fees (Ward or Conservatee) FW-001-GC. Using the incorrect entry/form will result in a rejection. |
| Information Release Authorization (VN043) | Attach the Release of Medical Information (VN132) and Release of School Information (VN133) forms to the Information Release Authorization form (VN043) as one PDF, they are not filed as separate documents. |
| Original Will | The original Will is to be submitted immediately to the Probate Clerk's office after filing Petition for Probate unless it has been previously lodged. Wills are not eligible for eFiling. |
| Selecting Existing Petition on Subsequent Filing | You may be required to select an existing Petition when filing a Subsequent Filing. The same Petition will need to be selected for each document submitted in a single transaction. If an incorrect petition is selected anywhere in the transaction the entire submission may be rejected. |
| Name Extention | When filing a document that includes a name extension, the name extension field must be completed. |
| Objection to Petition | When the Parent, Ward or Conservatee objects to the Petition for Appointment do not use Objection to Petition as it will create a \$435 filing fee, instead use Objection or Opposition . |
| One Fee Document per Transaction | Only one document with a filing fee is allowed per transaction (even if there is a Fee Waiver on file). Subsequent, Temporary or Ex Parte Petitions must be submitted as a separate transaction |

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| | once the case has been initiated. A memo must be added to the case initiating transaction to indicate a related petition or ex parte will be submitted once the case number is assigned. |
| Spousal Property Petition | When filing a Spousal Property Petition in a pending Petition for Probate case a \$435 fee will be created, and a hold will be placed on the credit card. The clerk will remove the fee during processing and the hold will be released (PC 13652). |
| Stipulation and Order | Select Stipulation and Order, <u>not</u> Stipulation and Order (name extension). If Stipulation and Order (name extension) is chosen a \$20 filing fee will be incorrectly charged. |
| Interpreter Request | Even if you check the “Do you need an interpreter?” box when filing a new case, a Request for Interpreter form <u>must</u> still be filed. |
| Party Sub Type | When establishing a new case there is no need to choose a Party Sub Type (ex. Incompetent Person, Minor, Proposed Guardian Ad Litem). |