

PROBATE COURT OF CUYAHOGA COUNTY, OHIO
GUIDELINES – E-FILE ESTATE ADMINISTRATIONS AND PROBATE OF WILLS

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General Guidelines and Documents

For Testate Estates (with Last Will and Testament)

Applicants named Executor in a Decedent's Will may E-File forms to administer the estate.

E-File users must follow the steps to submit the original Will to Probate Court outlined on page 8. As of 6/16/2021 Wills may also be presented in person at the Clerk's Office, Rm. 119 at Court.

E-Filed Applications to Probate Will (Form 2.0) will be set for hearing fourteen (14) calendar days from the date the Application is accepted. The original Will must be received by the fourteenth day or the Application to Probate Will and Application to Administer may be dismissed.

Only after the original Will is received, and admitted, will the Court proceed to review Applications to Administer the Estate (Form 4.0) and appoint an Executor or Administrator.

The Probate Court will index its database of Wills on Deposit for all new filings, prior to any appointment. When a later-dated Will on deposit is found to match with a decedent, the Court will notify the applicant of the following additional proceedings:

- If the applicant intends to continue to pursue the admission of a latest-dated Will located at the Court, she/he may be required to file an amended Application to Probate Will (Form 2.0) for the latest-dated Will, including an updated Form 1.0 as details of the Will require.

The Court may require additional waivers, hearings, and notice of hearing to interested parties for Wills presented for probate and Applications to Administer:

- For hearings on the appointment of an Executor or Administrator, Applicants must send Notice and Citation of Hearing on Appointment of Fiduciary (Form 4.4) per O.R.C. 2113.06 and 2113.07, or file Waivers of Right to Administer (Form 4.3) from interested parties.

In certain instances, applicants may be required to post a fiduciary's bond in accordance with law.

For Intestate Estates (no Will)

Applicants E-Filing forms to become an Administrator of a Decedent's estate may be required to attend a hearing on the Application for appointment.

- For hearings on the appointment of an Executor or Administrator, Applicants must send Notice and Citation of Hearing on Appointment of Fiduciary (Form 4.4) per O.R.C. 2113.06 and 2113.07, or file Waivers of Right to Administer (Form 4.3) from interested parties.

The Probate Court will index its database of Wills on Deposit for all new filings, prior to an appointment. When a Will on deposit is found to match with a decedent, the applicant will be notified and may file an Application to Probate Will (Form 2.0) or withdraw the Application to Administer, in order to allow the Executor named in the Will to petition to administer the decedent's estate.

Applicants may be required to attend subsequent hearings, submit additional documents, and post a fiduciary's bond in accordance with law.

Forms for Estate Filings

The Probate Court web pages list Ohio Supreme Court standard probate forms and additional documents accepted by the Cuyahoga County Probate Court in the administration of estates.

Navigate to the website forms, here: [Forms>Estate Forms](#)

Web address: <https://probate.cuyahogacounty.us/estforms.aspx>

Document Preparation and Signatures

Forms downloaded from the Court's web pages are fillable PDFs and **MUST be typed** complete with signatures. Handwritten forms will not be accepted.

Signatures on forms and pleadings may be submitted in the following ways:

- 1) As an ink signature, the signed document then converted to a scanned PDF copy, or
- 2) As an **E-Signature**, formatted by typing **/S/** in front of the **typed name** on signature lines, or
- 3) As an electronically signed or captured signature using software with audit tracking capability (e.g., DocuSign, RightSignature, Adobe Sign).

Note: The audit track is not required with submission for forms or pleadings but must be presented if requested by a hearing officer reviewing the document.

Exception: Waivers may NOT be submitted using the E-Signature format. See details below.

Preparation and Submission of Waivers

Signed waivers for Estate pleadings may be submitted to E-File using the following methods:

- 1) As scanned PDF copies with original ink signatures, or
- 2) As electronically signed PDF copies, using signature capture software which includes audit tracking capability (e.g., DocuSign, RightSignature, Adobe Sign).

Submit electronically signed waivers and attach to each its audit track in the same PDF file, behind the waiver form.

Waivers submitted without an audit track will be rejected. Electronically signed waivers may be subject to further review by hearing officers.

Information about Filing Original and Additional Bonds

The Probate Court may order a fiduciary's bond be posted by Executors or Administrators prior to appointment. Additional bonds may be ordered any time after an original bond has been posted.

All original notarized hard-copy bonds must be filed within thirty (30) days of the order and before letters of Executor or Administrator will be issued.

Additional notarized hard-copy bonds must be filed at Court within ten (10) days of the order.

BONDS CANNOT BE E-FILED.

- Bonds may be filed in person at the Clerk's Office, Rm. 119, or
- Bonds may be mailed.

If mailed, attach a cover-letter with contact information and your case number, then mail the ink-signed original/additional bond with the bond agent's power of attorney attached, to:

Probate Court Clerk's Office, Room 119, 1 Lakeside Ave. West, Cleveland, Ohio, 44113.

Information about Hearings

Once your Application to Probate Will or Application to Administer has been **Accepted**, you may receive a hearing notice with the date and time to appear at the Probate Court or additional instructions for off-site remote hearing options (e.g., via phone or *Zoom*).

Effective Wednesday, June 16, 2021, the Cuyahoga County Probate Court will resume full access to the public. The Clerk's Office will accept in-person filings, electronic filings, and those submitted by U.S. mail. With the resumption of in-person filings, drop boxes in the Rotunda and the Huntington Park Garage entrance have been removed.

Hearings may be conducted remotely or in-person, as determined by the Judge or Magistrate assigned to the case.

If you received an email or mail notice of hearing indicating a *Zoom* hearing is set, please do not appear at Court in person. If you have questions, please contact the Court to verify the status of your hearing.

Per the Administrative Order effective March 1, 2022, all individuals entering the courthouse are no longer required to wear face coverings but may choose to wear them.

Applicants must have printed hardcopies of E-Filed documents available for any hearing.

If you have a scheduling conflict, please call **216-443-8970**. The Court will make every effort to accommodate a convenient date and time for all parties concerned.

General Submission Procedures

E-Filed Submission of Will Procedure (Estates with a Will)

1. If there is a Will, an Application to Probate Will is E-Filed with a copy of the Decedent's death certificate and a list of the next of kin, legatees, devisees, and beneficiaries.
2. The original Will and a Notice of Presentation of Will is mailed by US Certified mail (or any commercial mail service requiring signature) to the Probate Court and reviewed for admission to the Court's record. The Will may also be presented in person in Rm. 119.

Application to Administer Estate Procedure (All Estates)

1. An Application for Authority to Administer Estate is E-Filed in the Probate Court of the County of the Decedent's residence by the Executor named in the Will, or another interested party.
2. A bond may be required by law.
3. A hearing may be scheduled.
4. Order Appointing Executor or Administrator is granted and letters of appointment issued.

E-Filing Submission Status

Acceptance or Rejection: An email will be sent to you from the Court.
(A separate email will be sent if a hearing is scheduled.)

Received: While under review by E-File staff the filing cannot be edited.

To Cancel: Login to the E-File System and select your filing through the **My Filings** tab.

Submitting an Original Last Will and Testament by Mail

1. Include a [Notice of Presentation of Will](#) listing the existing Probate Court Estate case number, the date the Application to Probate Will (Form 2.0) was filed, and the Decedent's and sender's names.

The notice also requires information indicating the date the Will was signed by the testator, and the number of pages of the Will (and any Codicils).

DO NOT STAPLE THE NOTICE OR MARK THE WILL IN ANY WAY

2. Send the Will by US Certified Mail (or by a commercial mail carrier that requires signature) within fourteen (14) calendar days from the date of your E-Filed receipt of your accepted Application to Probate Will.

Mail to: Cuyahoga County Probate Court Clerk's Office, Room 119
1 Lakeside Avenue West, Cleveland, Ohio 44113

DO

Keep a copy of the Will for your records

DO NOT

Send Wills without the [Notice of Presentation of Will](#) form
E-File Copies of Wills

Send Wills using Regular U. S. Mail

The Original Will remains the property of the Probate Court after it is admitted
Copies may be purchased by calling 216.443.8792

The Court may require you to present a copy of the Will at any time while the case is active.

Note: As of 06/16/2021 the Probate Court is re-open to the public. Original Wills of E-Filed cases may be brought to the Clerk's Office, Room 119 with a Notice of Presentation of Will.

E-Filing Steps to Probate Will for Record Only (No Administration)

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select WILL FOR RECORD ONLY

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form 2.0) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms MUST be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application to Probate Will (Form 2.0) (Do not attach Will)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)

Mail the original Will to Probate Court per Instructions page 8.

Keep a copy of the Will for your records.

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing Steps to Probate a Lost/Spoliated/Destroyed Will

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select PROBATE OF LOST WILL

Case Title: type the full name of the Decedent

*[Click **Save and Proceed** to advance each screen]*

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form 2.0) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms MUST be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application to Probate Will (Form 2.0) (Do not attach Will)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)

Mail the Lost/Spoliated/Destroyed Will to Probate Court per Instructions page 8.

Keep a copy of the Will for your records.

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing Steps for Release of Financial Information

(for the purpose of identifying possible probate assets for further administration)

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select APPLICATION TO RELEASE FINANCIAL INFORMATION

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form ES RFI) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
 - ☐ Upload the Application to Release Financial Information (Form ES.RFI)
 - ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
 - ☐ Upload any Waivers and Consents for Release of Financial Information from interested next of kin, legatees, and devisees (Form WAIVCON)
- *Submissions without waivers will be set for hearing. It is recommended you obtain and submit waivers with your Application whenever possible.**

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing Steps for Release of Medical Records or Medical Billing Records

(for the purpose of evaluating a potential Wrongful Death, Personal Injury, or Survival Action)

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select RELEASE OF MED RECORDS AND MED BILLING – NO PUB

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form ES595) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application to Release Medical Records and Medical Billing Records (Form ES595)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- ☐ Upload any Waivers and Consents to Release of Medical Records and Medical Billing Records from interested next of kin, legatees, and devisees (Form WAIV595)

***Submissions without waivers will be set for hearing. It is recommended you obtain and submit waivers with your Application whenever possible.**

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing Steps for Appointment of a Commissioner to Report on the Contents of a Safe Deposit Box

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select APPLICATION FOR APPOINTMENT OF COMMISSIONER TO REP

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form 6.4A) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application for Appointment of Commissioner to Report on the Contents of a Safe Deposit Box (Form ES6.4A)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- ☐ Upload any Waivers and Consents of next of kin, legatees, and devisees of appointment of Commissioner (Form 6.4C)

***Submissions without waivers will be set for hearing. It is recommended you obtain and submit waivers with your Application whenever possible.**

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing Steps for New Estate Administrations

Full Administration – Executor – With Will

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select ESTATE FULL ADM. W/WILL OR WILL ANNEXED

Case Title: type the full name of the Decedent

*[Click **Save and Proceed** to advance each screen]*

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Forms 2.0 and 4.0) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS: Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application to Probate Will (Form 2.0) (Do not attach Will)
- ☐ Upload the Application for Authority to Administer (Form 4.0)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- Optional if applicable:**
- ☐ Upload any Waivers of Right to Administer (Form 4.3)
- ☐ Upload Waiver of Service to Surviving Spouse of the Citation to Elect (Form 8.6)

Mail the original Will to Probate Court per Instructions page 8.

Keep a copy of the Will for your records.

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Full Administration – Administrator – No Will

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select ESTATE FULL ADM. NO WILL

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application(s)*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Estates*.

| Case Party Role on Web | Application Fields (Form 4.0) |
|---|---|
| <i>Applicant</i> | <i>Applicant</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application for Authority to Administer (Form 4.0)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- Optional if applicable:**
- ☐ Upload any Waivers of Right to Administer (Form 4.3)
- ☐ Upload Waiver of Service to Surviving Spouse of the Citation to Elect (Form 8.6)

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Special Administrator – With Will

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select ESTATE FULL ADM. SPECIAL ADMIN W/WILL

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application* and *Motion*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Special Administrator Estates*.

| Case Party Role on Web | Form 4.0 and Motion Form MOTESTAA |
|---|--|
| <i>Applicant (for Form 4.0)</i> | <i>Applicant</i> |
| <i>Special Administrator Applicant (Motion)</i> | <i>Attorney Applicant signing Motion</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application for Authority to Administer (Form 4.0)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- ☐ Upload the Application to Probate Will (Form 2.0) (Do not attach Will)
- ☐ Upload the Motion to Appoint Special Administrator ([PC Form MOTESTAA](#))

Mail the original Will to Probate Court per Instructions page 8.

Keep a copy of the Will for your records.

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the
SPECIAL ADMINISTRATOR APPLICANT

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Special Administrator – No Will

1. AFTER LOGIN: **Select File a New Case from the blue E-Filing tab**

Select ESTATE

Select ESTATE FULL ADM. SPECIAL ADMIN NO WILL

Case Title: type the full name of the Decedent

[Click **Save and Proceed** to advance each screen]

2. ADD CASE PARTIES:

Party Role information must match the information on the *Application* and *Motion*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

The following roles are REQUIRED for *Special Administrator Estates*.

| Case Party Role on Web | Form 4.0 and Motion Form MOTESTAA |
|---|--|
| <i>Applicant (for Form 4.0)</i> | <i>Applicant</i> |
| <i>Special Administrator Applicant (Motion)</i> | <i>Attorney Applicant signing Motion</i> |
| <i>Decedent, include all known AKAs</i> | <i>Decedent, include all known AKAs</i> |

3. ADD DOCUMENTS:

Fill-in forms **MUST** be typed complete and signed.

- ☐ Upload the Decedent's Death Certificate
- ☐ Upload the Application for Authority to Administer (Form 4.0)
- ☐ Upload the Next of Kin, Legatees, Devisees (Form 1.0)
- ☐ Upload the Motion to Appoint Special Administrator ([PC Form MOTESTAA](#))

4. FILING REVIEW: Review your data and documents for accuracy. [EDIT](#) for corrections.

5. PAYMENT: Add Credit or Debit Card billing information:

Submit the filing on behalf of the
SPECIAL ADMINISTRATOR APPLICANT

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing on Existing Estate Cases

[Login to your E-File account](#)

1. Select **File On An Existing Case** from the blue E-Filing tab

2. Search your existing estate case by name or number

Select the green  to E-File on your case

3. **ADD NEW or CLAIM EXISTING CASE PARTIES:** scroll to the bottom of the screen:

| Filing Pro Se | |
|---|--|
| To CLAIM yourself as an existing appointed Executor/Administrator | Click CLAIM PARTY next to your name |
| To ADD yourself as a new Applicant or other party on the case | Complete all fields; click SAVE PARTY |
| Attorneys | |
| To CLAIM an existing party to represent | Click CLAIM PARTY next to the party's name |
| To ADD a new Applicant or Creditor | Complete all fields; click SAVE PARTY |
| <i>If your party is already represented and claimed (Your name highlighted above party)</i> | Click SAVE and PROCEED to move directly to ADD DOCUMENTS |
| Continued next page | |

4. **ADD DOCUMENTS:** Choose a Docket Code from the menu, upload each as a PDF file.

Tip: In general, submit unrelated filings under separate confirmation numbers.
(e.g., Do not send an Account with a Motion to Correct Form 1.0.)

***See pages 20-28 for instructions for specific types of pleadings.**

5. **FILING REVIEW:** Review your data and documents for accuracy. [EDIT](#) for corrections.

6. **PAYMENT: Add Credit or Debit Card billing information:**

Select to file on behalf of the **FIDUCIARY** or **APPLICANT** (most filings)

Select to file on behalf of **CREDITOR**, **NEXT OF KIN**, or **OTHER** (Objections, Exceptions)

***Back costs already owed on your case must be paid prior to submission of new pleadings. To pay back costs owed on cases over the phone via credit or debit card, or for questions about case billing, contact the Clerk's Office at (216) 443-8896 and press '0' after the prompt. After back costs are paid, refresh the Payment screen and the SUBMIT button will once again be available for your new submission.**

*Your credit/debit card will be charged only AFTER your E-Filing has been accepted.
The name on the credit/debit card MUST match the Registered E-File Account Name.
Third party payments will NOT be accepted without prior arrangement with E-File staff.*

Click SUBMIT – Retain a copy of the **Filing Confirmation** for your records.

The Court will send an email to users indicating a filing has been Accepted or Rejected.

If the filing is Rejected, reasons for rejection will be listed in the email. Corrected filings may be resubmitted within 72 hours. If you do not correct the rejected filing within 72 hours, you must start the filing again with a new confirmation number.

For questions about filings: Have your confirmation number or case number or rejection email available for reference.

E-File Help Desk: (216) 443-8948 or probate_efile@cuyahogacounty.us.

Inventories, Accounts, Certificates, and other Estate Applications

Below are instructions to assist users with uploading groups of filings or filings specified for review by multiple departments at court. Following these instructions will increase efficiency in the review process and provide clarity on the Court's electronic docket.

Whenever possible, select dedicated codes from the dropdown menu on the ADD DOCUMENTS screen. The codes are listed alphabetically and generally match form captions. Contact the E-File Help Desk for further assistance or general questions about E-Filing.

For specific questions regarding required filings by fiduciaries, please contact the appropriate department and have your case number available to reference. A list of Probate Court department phone numbers follows this list.

Certificate of Notice of Probate of Will (Form 2.4)

- ☐ **Upload the Certificate ([Form 2.4](#)) as the top page of a single PDF file, with any combination of waivers or proof of service of notice to all interested parties (those listed on the front and reverse of Form 1.0 as it appears on the Court's docket). The Certificate should have attached any combination of the following:**
 - signed waivers ([Form 2.1](#) or copies of waivers submitted on Form 2.0), and/or
 - proof of service of Notice to parties submitted as copies of [Form 2.2](#) and accompanying certified mail "green" cards or USPS online records showing proof of delivery, and/or
 - proof of notice by ordinary U.S. mail (following a granted motion filed with the Court demonstrating undelivered or unclaimed certified mail), and/or
 - proof of notice by publication in the Daily Legal News returned and filed with the Court.

ALL parties listed on Form 1.0 must be accounted for or the filing will be rejected.

See page 5 regarding acceptable signatures for submission of waivers.

See Ohio Revised Code 2107.19 governing Notice of Admission of the Will and Ohio Civil Rule 73 for methods of service of notice.

Appointment of Appraiser (Form 3.0)

Note: File **after** fiduciary has been appointed **and prior to** submitting the Inventory, Form 6.0.

- ☐ Upload the signed and completed [Appointment of Appraiser, Form 3.0](#).

SEND FORM 3.0 UNDER ITS OWN CONFIRMATION NUMBER.

DO NOT ATTACH OR SEND WITH ANY ACCOUNTING DOCUMENTS.

Confidential Disclosure of Personal Identifiers (Form 45D)

- ☐ Upload the signed and completed [CDPI \(Form 45D\)](#) using its own code and send under the same Confirmation Number as the pleadings it references.

Inventories (Form 6.0 – 6.3AA)

Note: Appraiser Form 3.0 must be filed **prior to** submitting the Inventory

Submit the following documents as individual PDFs, using the available codes in the menu and instructions below. [See also the Inventory guideline on our Topics pages on the web.](#)

SEND ALL UPLOADS TOGETHER UNDER THE SAME CONFIRMATION SUBMISSION.

- ☐ Upload the signed and completed Inventory and Appraisal ([Form 6.0](#)) and Schedule of Assets (Form 6.1) as one PDF file using code **INVENTORY AND APPRAISAL FILED**. All assets should be listed with complete identifying details (account numbers, VINS, etc.).

Note: Fiduciaries who wish to keep full account numbers and identifying financial details confidential, must submit a separate completed Form 45D with the Inventory.

Upload the **Confidential Disclosure of Personal Identifiers** ([Form 45D](#)) using the dedicated code in the document menu.

- ☐ Upload in one PDF any signed **Waivers of Notice of Hearing on Inventory** ([Form 6.2](#)), if applicable.
- ☐ Upload the **Certificate of Service of Notice of Hearing on Inventory**, ([Form 6.3AA](#)), if applicable.
- ☐ Upload copies of the **Notice of Hearing on Inventory** ([Form 6.3](#)), if applicable.
- ☐ Upload copies of the **Notice of Hearing on Inventory** ([Form 6.3](#)), if applicable.

Notice to Administrator of Medicaid Estate Recovery Program (Form 7.0 and 7.0(A))

Applicant/Fiduciary must send notice form 7.0A by certified mail to the address printed on the form.

- ☐ Upload the Certificate ([Form 7.0](#)) as top page to a single PDF including proof of return of certified mail (e.g., signed “green card”) or other proof of delivery by commercial carrier. A copy of a letter from the Medicaid Administrator indicating no claim will be filed for the decedent’s estate is also acceptable. Use the code available for this form.

Continued next page

Application for Family Allowance (Form 7.1)

- ☐ Upload the signed **Application** ([Form 7.1](#)) available from the document menu. Check applicable boxes and list details about the asset with appraised values.

Do not use this form if there are minor children of the decedent who are not the children of the surviving spouse, or if there is no surviving spouse and more than one minor child. Use Form 7.2 instead.

Application for Apportionment of Family Allowance (Form 7.2(A))

- ☐ Upload the signed **Application** ([Form 7.2](#)) available from the document menu. Include names and addresses of the surviving spouse and any minor children, or if no surviving spouse, the names and addresses of any minor children and the parent or custodian of the minor(s). Whenever possible, include proposed distributions in the Entry portion of the form.

Election of Surviving Spouse to Take Under/Against Will (Form 8.1 OR Form 8.2)

- ☐ Upload either the **Election of Surviving Spouse to Take Under the Will** ([Form 8.1](#)) or, in the alternative, the **Election of Surviving Spouse to Take Against the Will** ([Form 8.2](#)), available from the document menu. The forms must be signed. It is advisable to consult with an Ohio licensed attorney prior to filing these forms.

Waiver of Service to Surviving Spouse of the Citation to Elect (Form 8.6)

- ☐ Upload the ink-signed **Waiver of Service to Surviving Spouse of the Citation to Elect** ([Form 8.6](#)) available from the document menu. It is advisable to consult with an Ohio licensed attorney prior to filing this form. This waiver **CANNOT** be signed using a conformed signature (/S/).

Application to Sell Personal Property (Form 9.0 – 9.2)

Note: Inventory Form 6.0 must be approved **before** Form 9.0 can be granted.

- ☐ Upload the signed **Application** ([Form 9.0](#)) available from the document menu. Check appropriate boxes and fill all required blanks on the front and reverse of the form. Items to be sold should be listed with identifying detail (e.g., Year and model, VINs, Serial numbers, Product IDs, Brand names, etc.)

Leave BLANK the Entry portion of the form and/or the Entry page (Form 9.1).

Consents signed on the bottom of Form 9.0 may be signed in ink, or if electronically signed using signature capture software, the audit track for each signature must be attached to the Application file.

Consents and waivers of notice of hearing may also be filed individually using the menu code “Waivers and Consent.”

Form 9.2 may be used to notify parties if requested by the hearing officer on your case.

Application to Distribute in Kind (Forms 10.0 – 10.2)

- ☐ Upload the signed **Application** ([Form 10.0](#)) available from the document menu. Check appropriate boxes and fill all required blanks on the front and reverse of the form.

Leave BLANK the Entry portion of the form and/or the Entry page (Form 10.1).

Consents signed on the reverse side of Form 10.0 may be signed in ink, or if electronically signed using signature capture software, the audit track for each signature must be attached to the Application file.

Consents and waivers of notice of hearing may also be filed individually using the menu code “Waivers and Consent.”

Form 10.2 may be used to notify parties if requested by the hearing officer on your case.

Consent to Power to Sell Real Estate (Form 11.0)

Note: Inventory Form 6.0 must be filed, and the Inventory approved before filing Form 11.0

- ☐ Upload the Consent ([Form 11.0](#)) with ink or electronically captured signatures of consenting parties. **Electronically captured signatures must include an audit track for each signature submitted. Attach audit tracks as last pages to the PDF.**

No power of sale is effective if a devisee or heir is a minor.

No person may give consent of a minor.

Check the box on the front side of the form that indicates consent is general or limited.

If listing parcels on the reverse side of form, type the street address, full legal description, and permanent parcel number for each parcel.

If needed for space, attach multiple copies of Form 11.0 together in one PDF.

Application for Certificate of Transfer (Form 12.0 and 12.1)

- ☐ Upload the Application ([Form 12.0](#)) with all fields completed, appropriate boxes checked, and the reverse side of the Application signed.

Attach the Certificate ([Form 12.1](#)) in the same PDF with the Application as first page.

The Prior Instrument Reference (e.g., volume and page or AFN) and the Permanent Parcel Number MUST be completed on the reverse side of Form 12.1, or the filing will be rejected.

Legal descriptions must be typed, or an image of the description affixed, on the reverse side of Form 12.1. If additional space is needed, you must first use ALL the space on Form 12.1 and then continue with attached pages as needed. DO NOT leave the reverse side of Form 12.1 blank or use the space to reference attachments. Blank Certificates citing only attachments will not be accepted by the County Recorder's office.

For multiple parcels in Cuyahoga County – Use a single Application Form 12.0 with separate Certificate forms for each parcel attached in the same PDF.

Number ALL Certificates and list the corresponding numbers on the front side of Form 12.0 on the line provided.

Application and proposed Certificate numbers must match and be consistent throughout both forms (e.g., Certificate of Transfer 1 or Certificate of Transfer 1 & 2).

For multiple parcels in multiple counties – Use a separate Application for each county and upload the accompanying Certificate of Transfer in the same PDF.

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Partial or Final Accounts (Forms 13.0 – 13.9)

*Accounts may be rejected if unpaid costs are owed on the case. Contact the **Clerk's Office** at **(216) 443-8896** and press **'0'** after the prompt for payment or payment inquiries.

Submit the following documents as individual PDFs, using the available codes in the menu and instructions below. [See also the Accounts and Inventories Topic page on the web.](#)

SEND ALL UPLOADS TOGETHER UNDER THE SAME CONFIRMATION SUBMISSION.

- ☐ Upload the signed [Fiduciary's Account \(Form 13.0 front and reverse\)](#).
Choose Docket Code: **FIDUCIARY'S PARTIAL ACCOUNT**, or
FIDUCIARY'S FINAL ACCOUNT.
- ☐ Upload Forms 13.1 and 13.2 and any spreadsheets or handwritten accounting sheets as one PDF file using code **ADDITIONAL PAGES OF ACCOUNTING**.
- ☐ Upload Funeral bills, Bank statements, HUD/Settlement Statements, Attorney or Fiduciary Computations, and Receipts for Specific Bequests using code **SUPPLEMENTAL DOCUMENTS**.
- ☐ Upload in one PDF any signed **Waivers of Notice of Hearing and Consent to Account** ([Form 13.7B](#)) if applicable.
- ☐ Upload the **Application to Extend Administration** ([Form 13.8](#)) if applicable.
- ☐ Upload the **Certificate of Service of Account** ([Form 13.9](#)) if applicable.
- ☐ Upload a **Confidential Disclosure of Personal Identifiers** ([Form 45D](#)) as needed.
- ☐ **Notice of Hearing on Account** ([Form 13.5](#)) required with some Final Accounts for any interested parties who did not sign a Waiver of Notice of Hearing and Consent to Account (Form 13.7B). Upload copies of the Notice for each party and attach proof of delivery of notice with accompanying certified mail "green" cards or USPS online records showing proof of delivery, or other proof of receipt of notice as governed by Ohio Civil Rule 73 and Local Rule 64.2. Use the Account approval dates listed on our website to complete the Notice form. See note below for approval dates.

Note: Pre-set approval dates for Inventories and Accounts can be found on the Probate Court's website in the following locations: under the [Accounts and Inventories Topics page](#), within the E-File Estate Guideline, and on the Miscellaneous Forms page.

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Certificate of Termination (Form 13.6.)

*In place of a Final Account, R.C. 2109.301 allows for a **Certificate of Termination** (Form 13.6) to be filed thirty days after completing the administration of the estate. Refer to the Ohio Revised Code or a licensed Ohio attorney before filing the Certificate in place of a Final Accounting.*

- ☐ Upload the Certificate ([Form 13.6](#)) and attach a copy of the **decedent's paid funeral bill** as one PDF file using code **CERTIFICATE OF TERMINATION**.

Note: If applicable, also attach to the PDF **copies of the computation of fees** if fees are to be taken by the fiduciary and/or by the attorney.

Report of Newly Discovered Assets

- ☐ Upload the [REPORT OF NEWLY DISCOVERED ASSETS](#) under its own code from the menu. Upload as a separate PDF the blank **Judgement Entry** page using the PROPOSED ORDER code. Also, if applicable, upload Form 45D (*Confidential Disclosure of Personal Identifiers*) as its own PDF using the code dedicated to Form 45D. Send all uploads under the same confirmation number.

Wrongful Death, Personal Injury, and other Litigation Actions

- ☐ Upload the **Application** ([Form 14.0](#)) and the proposed **Entry Approving Settlement** (Form 14.2) as one PDF using code APPLICATION TO APPROVE SETTLEMENT AND DISTRIBUTION OF WRONGFUL DEATH AND SURVIVAL CLAIMS.
- ☐ Upload separately in one PDF any signed **Waivers and Consent to the Wrongful Death and Survival Claims** ([Form 14.1](#)), if applicable.
- ☐ After approval, file the Report of Distribution ([guideline for assistance, here](#)).

Continued next page

Motions to Amend/Correct Data or Forms on the Existing Court Docket

- ☐ Attach the corrected form behind your motion in one PDF file.
- ☐ Upload the entry page PDF using code “Proposed Order Filed.”

Motion for Continuance (of a scheduled hearing)

Please give as much advanced notice as possible when filing this motion.

Include a **‘Note to Clerk’** on the E-File Final Review Screen **indicating your pleading is urgent or time-sensitive**. You can also contact the E-File staff by phone (216-443-8948) to check the status of your motion or to let them know well in advance of the urgency before you file.

- ☐ Attach the Motion for Continuance PDF using the dedicated code MOTION FOR CONTINUANCE available in the upload menu.
- ☐ Upload the entry page PDF using code “Proposed Order Filed.”

Other Motions and Pleadings

- ☐ Attach the Motion PDF file using dedicated motion codes available in the upload menu.
- ☐ Upload the entry page PDF separately using code “Proposed Order Filed.”

Proposed Orders and Agreed Judgment Entries

- ☐ Upload the proposed entry page PDF using code “Proposed Order Filed.”

Representation of Insolvency Actions (Forms 24.0 – 24.6)

Note: Inventory Form 6.0 must be filed prior to submitting Representation of Insolvency.

Upload in one PDF the following forms using the code **REPRESENTATION OF INSOLVENCY**:

- ☐ Representation of Insolvency ([Form 24.0](#)) typed and signed by fiduciary.
- ☐ Insolvency Schedule of Claims ([Form 24.4](#)).
- ☐ Continuation Insolvency Schedule of Claims ([Form 24.5](#)) (as needed)

*The Court will set a hearing on the matter and notice must be served to interested parties. Prior to the hearing for Insolvency, the fiduciary must file **Verification of Service**:*

- ☐ Upload **Verification of Service of Notice of Hearing on Representation of Insolvency and Schedule of Claims** ([Form 24.3](#)) as the top page of a single PDF file, with any combination of waivers or proof of service of notice, attached:
 - signed waivers of notice, and/or
 - proof of service of **Notice of Hearing on Representation of Insolvency and Schedule of Claims** to parties submitted as copies of [Form 24.2](#) for each party and accompanying certified mail “green” cards or USPS online records showing proof of delivery, and/or
 - proof of notice by publication in the Daily Legal News returned and filed with the Court.

Amended Representations of Insolvency may be E-Filed.

- ☐ Upload Forms 24.0, 24.4, and 24.5 in one PDF and clear indication on all forms the filing is “Amended.” Use the code **REPRESENTATION OF INSOLVENCY**. Amended filings may require further hearings and notice to parties. The Probate Court recommends all fiduciaries consult a licensed probate attorney prior to submitting filings.

Creditor’s Notice of Claim and/or Presentation of Claim

Please see [the separate E-File Guide for filing claims](#) on Estate cases.

Fiduciary’s Application for Allowance of Claim

Please see [the separate E-File Guide for filing this Application for Allowance of Claim](#).

Original or Additional Bonds (Bonds may NOT be E-Filed)

- ☐ Bonds may be filed in person at the Clerk’s Office, Rm. 119, or mailed to Court:
If mailed, attach a cover-letter with contact information and your case number, the ink-signed original/additional bond, and the bond agent’s power of attorney, then send to:

Probate Court Clerk’s Office, Room 119, 1 Lakeside Ave. West, Cleveland, Ohio, 44113.

Application to Reopen an Estate Administration and (Re)Appoint a Fiduciary

1. **AFTER LOGIN:** **Select File on an Existing Case from the blue E-Filing tab**
Search your existing estate case by decedent's name, or
Search using the case number (exclude the year and EST indicator).
Select the case from your Search Results, then select the green "E" to E-File on your case.

2. **ADD PARTIES:** The following roles are REQUIRED to *Reopen an Estate*.

| Case Party Role on Web | Application Fields (Form 4.0) |
|------------------------|-------------------------------|
| Applicant(s)* | Applicant(s) |

***Do NOT claim a previously discharged Fiduciary party role; add a new Applicant for this Application.**

Party Role information must match the information on the *Application*.

Enter all names complete without abbreviations or initials.

Enter any Alias Names (AKAs) in the alias fields provided.

3. **ADD DOCUMENTS:** Fill-in forms **MUST** be typed complete and signed.

IF THE FIDUCIARY IS THE SAME from the last administration:

- ☐ Upload the Application to Reopen Estate and Appoint Fiduciary ([Form 13.12](#))
- ☐ Upload an updated Next of Kin, Legatees, Devisees ([Form 1.0](#))
Form 4.0 is not required.

IF THE FIDUCIARY IS NOT THE SAME from the last administration:

- ☐ Upload the Application to Reopen Estate and Appoint Fiduciary ([Form 13.12](#))
- ☐ Upload the Application for Authority to Administer ([Form 4.0](#))
- ☐ Upload an updated Next of Kin, Legatees, Devisees ([Form 1.0](#))

4. **FILING REVIEW:** Review your data and documents for accuracy. [EDIT](#) for corrections.

5. **PAYMENT:** Add Credit or Debit Card billing information:

Submit the filing on behalf of the **APPLICANT**

Your credit/debit card will be charged only AFTER your E-Filing has been accepted.

The name on the credit/debit card MUST match the Registered E-File Account Name.

Third party payments will NOT be accepted without prior arrangement with E-File staff.

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Probate Court of Cuyahoga County Department Phone Contacts

To speak to a Magistrate in the Court's general Front Office – (216) 443-8979.

For procedural questions on Estate Accounts and Inventories – (216) 443-8770.

To pay back costs owed on cases over the phone via credit or debit card, or for questions about case billing, contact the Clerk's Office – (216) 443-8785 and press '0' after the prompt to speak to a clerk.

For questions about copies or the issuance of Letters of Appointment – (216) 443-8793.

For all questions related to E-File User Accounts and E-Filing – (216) 443-8948.

Users may also email the E-File Help Desk at probate_efile@cuyahogacounty.us