

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 7. 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 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.

Individual numbered forms are available in the **Search by Form Number** menu.

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

Web address: <http://probate.cuyahogacounty.us/forms.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

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 mailed to the Court within thirty (30) days of the order and before letters of Executor or Administrator will be issued.

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

See page twenty (p.20) of this guide for mailing instructions for bonds.

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 hearing options (e.g., phone, Zoom, WebEx, Teams).

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, based upon the determination of the Judge or Magistrate.

If you received an email or mail notice of hearing, your hearing remains on Zoom, please do not appear in person. If you have questions, please contact the Court to verify the status of your hearing.

All individuals entering the courthouse must wear a face covering and will be subject to temperature screening. Please refer to the Administrative Order effective June 16, 2021 for further information.

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.
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 Clerks 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 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 with ink signatures or **E-Signatures**

- 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)

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

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

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.

Submit the filing On Behalf of **the APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Mail the original Will to Probate Court per Instructions page 7

Bring ALL original documents listed above to your hearing

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 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 with ink signatures or **E-Signatures**

- 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)

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

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

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.

Submit the filing On Behalf of **the APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Mail the lost/spoliated/destroyed Will to Probate Court per Instructions page 7

Bring ALL original documents listed above to your hearing

E-Filing Steps for Release of Financial Information

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 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 with ink signatures or **E-Signatures**

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:

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.

Submit the filing On Behalf of the **APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Bring ALL original documents listed above to your hearing

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 (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 with ink signatures or **E-Signatures**

- 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:**
- Upload any Waivers of Right to Administer (Form 4.3)

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

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

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.

Submit the filing On Behalf of the **APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Mail the original Will to Probate Court per Instructions page 7

Bring ALL original documents listed above to your hearing

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 with ink signatures or **E-Signatures**

- 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:**
- Upload any Waivers of Right to Administer (Form 4.3)

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

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

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.

Submit the filing On Behalf of the **APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Bring ALL original documents listed above to your hearing

Full Administration – Executor – With Will

*To pursue Wrongful Death Action

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

Select ESTATE

Select EST. FULL ADM. WR. DEATH WITH 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 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 with ink signatures or **E-Signatures**

- 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:**
- Upload any Waivers of Right to Administer (Form 4.3)

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

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

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.

Submit the filing On Behalf of **the APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Mail the original Will to Probate Court per Instructions page 7

Bring ALL original documents listed above to your hearing

Full Administration – Administrator – No Will

*To pursue Wrongful Death Action

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

Select ESTATE

Select EST. FULL ADM. WR. DEATH 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*.

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 with ink signatures or **E-Signatures**

- 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:**
- Upload any Waivers of Right to Administer (Form 4.3)

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

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

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.

Submit the filing On Behalf of the APPLICANT

Print a copy of the **Filing Confirmation** for your records.

Bring ALL original documents listed above to your hearing

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*.

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>Special Administrator 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 with ink signatures or **E-Signatures**

- 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](#))

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

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

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.

Submit the filing On Behalf of **the APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Mail the original Will to Probate Court per Instructions page 7

Bring ALL original documents listed above to your hearing

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*.

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>Special Administrator 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 with ink signatures or **E-Signatures**

- 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:

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.

Submit the filing On Behalf of the **APPLICANT**

Print a copy of the **Filing Confirmation** for your records.

Bring ALL original documents listed above to your hearing

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
<i>Continued next page</i>	

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

Tip: In general, submit Accounts and Inventory filings under separate confirmation numbers from other pleadings (e.g., Motion to Correct Form 1.0).

***See pages 19-21 for Special 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)

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.

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 to increase efficiency in the review process and provide clarity on the Court's electronic docket.

Whenever possible, select codes provided for pleadings on the ADD DOCUMENTS screen. 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.

Appointment of Appraiser

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

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.

SEND ALL UPLOADS TOGETHER UNDER THE SAME CONFIRMATION SUBMISSION.

- Upload the signed and completed Inventory and Appraisal ([Forms 6.0](#)) and Schedule of Assets ([Form 6.1](#)) as one PDF file using code **INVENTORY AND APPRAISAL FILED**.
- 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.

Continued next page

Partial or Final Accounts

*Accounts may be rejected if unpaid costs are owed on the case.
Contact the **Clerks Office** at **(216) 443-8786** to inquire about payment.

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.

Original or Additional Bonds

- 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 Clerks Office, Room 119, 1 Lakeside Ave., Cleveland, Ohio, 44113.

Report of Newly Discovered Assets

- Upload under its own confirmation number. Form 45D (*Confidential Disclosure of Personal Identifiers*) may be submitted under the same confirmation number but uploaded separately as its own PDF and using the code dedicated to Form 45D.

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Certificates

- Upload Certificates of Notice with any related signed Waivers or related proof of Notice attached as one PDF file, with the Certificate as the first page. See page 4 for instructions for submission of waivers.

Application for Release of Financial Information – See page 10.

Applications for Cert. of Transfer, and other Estate Application packets **(DOES NOT INCLUDE RELEASE OF ASSETS OR SUMMARY RELEASE OF ASSETS)**

- Upload Applications using standard Ohio Supreme Court Estate forms located on our Court's website. Attach any related forms that are part of the packet as one PDF file, with the Application as the first page. All forms requiring signature of the fiduciary or applicant must be signed.
- Upload related Waivers to Applications separately. Waivers may be ink-signed or signed electronically using document signature software which includes audit tracking capability (e.g., DocuSign). **Electronically signed waivers must include an audit track verifying signatures attached with the waiver.** Whenever possible, provide a typed name below or beside signatures.

Motions to Amend/Correct 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."

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 entry page PDF using code "Proposed Order Filed."

Questions about uploading documents?

Uncertain about an instruction in your Rejection email?

Email the E-File Help Desk at probate_efile@cuyahogacounty.us

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) 443-8776.

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.