

First Judicial District of Pennsylvania
Court of Common Pleas of Philadelphia County
Orphans' Court Division



ORPHANS' COURT
ELECTRONIC FILING SYSTEM
USER MANUAL

Honorable Matthew D. Carrafiello
Administrative Judge
Orphans' Court Division

Honorable Ronald R. Donatucci
Clerk of the
Orphans' Court Division

Revised March 1, 2017

1. INTRODUCTION

This User Manual provides instructions for using the Orphans' Court Electronic Filing System (OCEFS) to file documents with the Clerk of the Orphans' Court Division of Philadelphia County, to view documents filed beginning in 2005, and thereafter, in connection with all Orphans' Court cases in the system in which you are a party or represent a party, as well as view docket reports. There are three basic requirements to access OCEFS: Internet access and Adobe Acrobat or similar program necessary to convert, save and view the electronic pleading from its word processing format (i.e. Word or WordPerfect) to a Portable Document Format (pdf).

OCEFS System Capabilities – The OCEFS can be accessed through the First Judicial District of Pennsylvania's (FJD) website as follows:

Access the FJD Web Page at <http://www.courts.phila.gov> . Open the "Online Services" tab on the tool bar. Click the "Civil, Criminal & Orphans' E-Filing" link to begin the process of accessing OCEFS.

To view or download the most recent version of the OCEFS *User Manual*, click that link at the bottom of the User Log On screen.

To Apply for a User Name, password and PIN which is needed to log on to electronically file pleadings and documents in Orphans' Court cases, click that link at the bottom of the User Log On screen.

To update changes to your User e-mail, address or phone number, click on Update Information on the User Log On Screen or on the Welcome Screen.

If you forgot your Password or User Name, click that link at the bottom of the User Log On screen. You will need to enter your PIN. Your User Name, Password and PIN will be emailed to your registered email address. If you do not remember your PIN, send an email to ocsupport@courts.phila.gov requesting the desired information.

To view the Orphans' Court Electronic Filing User Manual, which provides a brief overview of the Electronic Filing System; click that link at the bottom of the User Log On screen.

The state and local Orphans' Court rules which implement electronic filing are also available from links on the User Log On screen. The rules are also attached to this *User Manual as Appendix 1*.

User Registration

Access to the OCEFS requires a User Name, Password and PIN which are issued by the Orphans' Court. See *Section 2*.

PDF Document Submissions

Pa.O.C. Rule 4.7 (b) requires that legal papers be filed in pdf format. The OCEFS application does not permit the attachment or submission of documents which are not in PDF format. Nonetheless, please view the pdf formatted document before it is e-filed to ensure that it appears in its entirety and in the proper form.

PLEASE NOTE: DO NOT CREATE A PDF VERSION BY PRINTING THE DOCUMENT AND SCANNING IT. The electronic document will become much larger and will lose some of the functionality needed to properly process it in the OCEFS.

2. THE ORPHANS' COURT ELECTRONIC FILING SYSTEM

First Judicial District's Homepage – At your computer go to your internet browser available through your Internet Service Provider (ISP). In the address window at the top of the screen, type in <http://www.courts.phila.gov> to access the First Judicial District's Website.

<p>Orphans' Court Electronic Filing System – On the FJD Home page, <i>click</i> on the Online Services link at the top right of the home page screen. Under the Electronic Filing Systems heading <i>click</i> on the Civil, Criminal & Orphans' E-Filing link.</p>	 <p>The screenshot shows the homepage of The Philadelphia Courts, First Judicial District of Pennsylvania. The header includes the court's logo and name. A navigation bar contains links for HOME, CONTACT US, COURTS OF THE DISTRICT, JURY SERVICE, ONLINE SERVICES, SEARCH COURT RECORDS, and MOBILE. The main content area features a large image of the Philadelphia skyline with the text "Welcome to the Philadelphia Courts First Judicial District of Pennsylvania". To the right, a sidebar lists various services, including "ELECTRONIC FILING SYSTEMS" with a sub-link for "Civil, Criminal & Orphans' E-Filing".</p>
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Current Users

User Log On Screen – Enter your Username, Password and Pin then click on the Enter button to access the system.

This screen also includes a link you can click for assistance if you forgot your password.

The Philadelphia Courts
Electronic Filing System

Username:

Password:

Pin:

Enter

Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules [Pa.O.C.R. 1.3 and 4.7](#) and [Phila.O.C.R. 4.7.A](#), [Pa.R.C.P. 205.4](#), [Phila.R.C.P. *205.4](#) and [Phila.R.C.P. 204.1](#) and [Phila.R.Crim.P.576](#) and agrees to comply with same.

Enter

Need Help?

[Forgot your password? Click here](#)

[To Apply for a User Name, click here](#)

[FJD Civil Electronic Filing User Manual](#)

[Orphans' Court Electronic Filing User Manual](#)

[To update your information, click here](#)

[Criminal Electronic Filing Tutorial](#)

PowerPoint required

New Users

User Name Application Process - Click on the link in the lower right hand corner to apply for Username

The Philadelphia Courts
Electronic Filing System

Username:

Password:

Pin:

Enter

Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules [Pa.O.C.R. 1.3 and 4.7](#) and [Phila.O.C.R. 4.7.A](#), [Pa.R.C.P. 205.4](#), [Phila.R.C.P. *205.4](#) and [Phila.R.C.P. 204.1](#) and [Phila.R.Crim.P.576](#) and agrees to comply with same.

Enter

Need Help?

[Forgot your password? Click here](#)

[To Apply for a User Name, click here](#)

[FJD Civil Electronic Filing User Manual](#)



[Orphans' Court Electronic Filing User Manual](#)



[To update your information, click here](#)

[Criminal Electronic Filing Tutorial](#)



PowerPoint required

If you are an attorney

<p>Step 1</p> <p>Choose "I am an attorney licensed to practice in Pennsylvania."</p>	 <p>The Philadelphia Courts Electronic Filing System</p> <p>Create New User Name</p> <p>Choose one:</p> <p><input type="radio"/> I am an attorney licensed to practice in Pennsylvania.</p> <p><input type="radio"/> I am not an attorney. I represent myself in the litigation for which I am requesting a User Name and Password ("PRO SE").</p> 
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<p>Step 2</p> <p>Enter your "PA Attorney Number" (<i>Do not include leading zeros</i>), and your "Date of Birth."</p>	 <p>The Philadelphia Courts Electronic Filing System</p> <p>Create New User Name</p> <p>For security purposes, we need to verify your identification. Please enter the following information.</p> <p>PA Attorney Number <input type="text"/> <small>Leading zeros will be truncated.</small></p> <p>Date of Birth <input type="text" value="Day"/> <input type="text" value="Month"/> <input type="text" value="Year"/></p> <p><input type="button" value="Submit"/></p> 
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If you are not an attorney

<p>Step 1</p> <p>Choose "I am not an attorney. I represent myself in the litigation for which I am requesting a User Name and password ("PRO SE")."</p>	<div data-bbox="483 346 1372 945"><h3>The Philadelphia Courts Electronic Filing System</h3><p>Create New User Name</p><p>Choose one:</p><p><input type="radio"/> I am an attorney licensed to practice in Pennsylvania.</p><div data-bbox="537 703 1295 814"><p><input type="radio"/> I am not an attorney. I represent myself in the litigation for which I am requesting a User Name and Password ("PRO SE").</p></div></div>
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<p>Step 2</p> <p>Enter your personal information.</p>	<div data-bbox="470 1081 1364 1753"><p>Create New User Name</p><p>Please enter all information, then click on "Submit". Your user name, pin number, password and ProSe number (if not an attorney) will be emailed to the email address you entered.</p><p>You can enter an optional additional two email addresses below. All correspondences, receipts and confirmation emails will also be sent to them.</p><p>I verify that the statements made herein are true and correct, and that false statements herein are made subject to the penalties of 18 Pa. C.S. §4904, relating to unsworn falsification to authorities.</p><p><input type="checkbox"/> By clicking "Submit" I request that you issue a username and password which I will use to access the Electronic Filing System and agree to comply with all applicable rules.</p><p><input type="text" value="Additional Email Address 1"/></p><p><input type="text" value="Additional Email Address 2"/></p><p><input type="button" value="Submit"/></p></div>
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Upon submission the following screen will be displayed advising the user that an email will be sent immediately to the registered email address:

IMPORTANT NOTICE!


Spam Filters. The Password issuance process is fully automated, and an email is generated within minutes of your request for a User Name. This email contains the User Name, Password and PIN. However, we have received numerous calls and emails from Users who have not received their User Name, Password and PIN. Should you not receive an email with your user name information within 30 minutes of your submission request, the most likely culprit is a spam filter, most likely installed by your Internet Service Provider or your network administrator, which intercepts this email. The email may be in your "Trash" or similar email folder. Ask your ISP or network administrator to review your spam filters. Should you be unable to retrieve this email contact ocsupport@courts.phila.gov.

Upon successful logon the following screens will display for access into the system:

<p>Select Civil/Orphans' E-Filing System</p> <div style="text-align: center;"><p>Welcome</p><p>Username: <input type="text"/></p><p>Update Information</p><p>TODAYS DATE: <input type="text"/></p><ul style="list-style-type: none"><input type="button" value="Civil/Orphans' E-Filing System"/><input type="button" value="Criminal E-Filing System"/><input type="button" value="eSubpoena (CP Civil)"/><input type="button" value="eDiscovery (Criminal)"/><input type="button" value="Search Civil Dockets"/><input type="button" value="Search Orphans' Court Dockets"/><p>Log Off</p></div>	<p>Read and Accept Disclaimer</p> <div style="border: 1px solid black; padding: 10px;"><p style="text-align: center;">DISCLAIMER IMPORTANT INFORMATION</p><p>1) A Username, Password and PIN are necessary to access the Electronic Filing System to file or view legal papers or pleadings to which a user is entitled. To apply for a Username, Password and PIN, go to the First Judicial District's Website at http://www.courts.phila.gov and click on the "On-Line Services" tab.</p><p>2) Court rules contain important provisions which govern Electronic Filing procedures. You must be familiar with the following rules:</p><ul style="list-style-type: none">(a) For Civil Cases: Pennsylvania Rule of Civil Procedure No. 205.4 and Philadelphia Civil Rule *205.4.(b) For Criminal Cases: Philadelphia Local Criminal Rule 576.(c) For Orphans' Court Cases: Pennsylvania Orphans' Court Rule 1.3 and 4.7 and Philadelphia Orphans' Court Rule 4.7.A.<p>3) All legal papers, including exhibits, must be submitted in a <i>pdf (portable document format) format and limited to 5 megabytes per legal paper</i>. Please consult the <i>User Manual</i> for tips on how to save or convert a legal paper or exhibit to pdf format.</p><p>4) The filer must attach to all legal papers (whether filed electronically or in a paper format) a scanned copy of the signed affidavit or verification required by Pa.R.C.P.No. 1024, Pa.R.Crim.P. 575 and Pa.O.C.Rule 3.13, as well as any other legal paper that requires or contains multiple signatures.</p><p style="text-align: center;"><input type="button" value="Accept"/> <input type="button" value="Decline"/></p></div>
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After you've selected the Civil/Orphans' E-Filing option and accepted the Disclaimer you'll move to the Electronic Filing Welcome Screen. This screen allows you to file a new case and file a pleading or document in an existing case. This screen also houses your filing history which tracks all of your electronic filing submissions. There are four statuses:

1. Drafts: Filing started but not submitted to the court for review.
2. Pending: Filing submitted to the court but not yet approved.
3. Accepted: Filing reviewed and accepted, filed and docketed by the court.
4. Rejected: Filing reviewed but returned for correction of a defect.


The Philadelphia Courts
Electronic Filing System

November 22, 2016 02:33pm 🔔

Welcome!

Username
[Update Information](#)

New Case

Existing Case

Discovery Hearing

Motions

My Civil and Orphans' Court Cases

My Family Court Cases

Dockets

FJD Portal

eSubpoena (CP CMI)

CP Civil Help

Orphans' Help

Log Off

E-Filing Summary
 Pending: 0
 Rejected: 12
 Accepted: 323
 Draft: 36

Electronic Filing History

E-File #	Court	Type	Case ID	Status	Created	Ref. No.
1611016533	OC	SUBC	2015 XXXXXX	Filed, 11/09/16	11/07/16	
1611016047	OC	SUBC	2015 XXXXXX	Filed, 11/07/16	11/07/16	
1610004926	OC	SUBC	2016 XXXXXX	Filed, 10/04/16	10/04/16	
1609052934	OC	SUBC	2016 XXXXXX	Filed, 09/23/16	09/23/16	
1609031968	OC	SUBC	2016 XXXXXX	Filed, 09/15/16	09/15/16	
1609027002	OC	SUBC	2013 XXXXXX	Filed, 09/13/16	09/13/16	
1609026948	OC	SUBC	2013 XXXXXX	Filed, 09/13/16	09/13/16	
1609017132	OC	SUBC	2013 XXXXXX	Filed, 09/09/16	09/09/16	
1608071740	OC	SUBC	2013 XXXXXX	Filed, 09/13/16	08/31/16	
1608071687	OC	SUBC	2013 XXXXXX	Filed, 09/13/16	08/31/16	
1608059170	OC	SUBC	2013 XXXXXX	Filed, 08/25/16	08/25/16	
1608059132	OC	SUBC	2013 XXXXXX	Filed, 08/25/16	08/25/16	
1608059089	OC	SUBC	2013 XXXXXX	Filed, 08/25/16	08/25/16	
1608059047	OC	SUBC	2013 XXXXXX	Filed, 08/25/16	08/25/16	
1608058948	OC	SUBC	2013 XXXXXX	Filed, 08/25/16	08/25/16	
1608045054	OC	SUBC	2016 XXXXXX	Filed, 08/18/16	08/18/16	
1608029559	OC	SUBC	2013 XXXXXX	Filed, 08/12/16	08/12/16	
1608024048	OC	SUBC	2016 XXXXXX	Filed, 08/10/16	08/10/16	
1607055274	OC	COMM	2016 XXXXXX	Filed, 07/26/16	07/26/16	
1606058870	OC	COMM	2016 XXXXXX	Filed, 06/24/16	06/24/16	

New Case: If no papers, documents or pleadings have been filed with the Clerk of the Orphans' Court in connection with an Estate (even if the Estate is a Decedent's Estate which was commenced in the Office of the Register of Wills), and an Orphans' Court number has not been assigned to the Estate, you must click the "New Case" option in the Command Box located at the left of the Electronic Filing History screen.

<p>New Case Filing</p> <p>Select new case from the main menu.</p> <p>Select Orphans' Court then continue onto page 1.</p>	
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<p>Page 1 - Enter Estate Information</p>	<p>Page 2 - Continue</p>
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Page 3 - Continue

You are in Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

***Is notice required?**

No. There are no interested parties.

Yes. Notice to plead is affixed or attached to this pleading.
Date of Notice:

Yes. All joinders/consents are attached to this pleading.

***If citation is requested:**

1. Was Citation against Respondent previously issued? Yes No

2. If yes, date of service:

*Has another petition been decided in this case? Yes No

*Is another petition pending? Yes No

If yes, identify the Judge:

If this is a new case, please enter the applicable information below

Date of Birth If Unknown, check here

Date of Death

Register of Wills Number - -

Date of Deed of Trust

SSN / EIN Supply EIN if Deed of Trust

The Filing Party must complete the information above. The information will only be used by the Clerk. The Clerk will not release this information to the general public

Page 4 - Continue

You are in Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

***TO THE CLERK OF ORPHANS' COURT**

Kindly enter my appearance I have entered my appearance

on behalf of (check all the names below that apply)

Party Name

Party Name

Electronic Service will be sent to email address listed below.
To update any information, [click here](#).

Name of Filing Attorney or Party	Name of Filing Party
Address	Address City State Zip Code
Phone Number	XXX-XXX-XXXX
Fax Number	XXX-XXX-XXXX
Supreme Court Identification No.	Attorney ID No.
E-Mail Address	XXX@XXXXX.XXX
<input type="button" value="Update Information"/>	

Page 5 – Upload Document

You are in Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

***File Attachment**

Please limit the maximum file size for each document to 10MB

Choose a file to attach: (must be a PDF file)

Add file to the list:

[Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
<small>A file format created by Adobe®</small>		

Page 6 – Select Payment Type

You are in Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

Total fee for this filing: \$ 65.50

Credit Card Payment

Pay by Mail

Walk-in and pay over the counter

Are you filing In Forma Pauperis and without payment of filing fees?

Court Ordered Waiver of Filing Fee

Summary Page

You are in Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

Final Review
All entries provided here are not considered final until the review process has been completed. Read all necessary names, parties and other information for accuracy and click on Submit.

[Refresh this page](#)

If you went back and made changes, it is important that you refresh this page.

E-Filing # Displays E-Filing Number		SUMMARY
Generated: Displays date and time summary sheet was generated		
NAME OF ESTATE: Displays Information Entered From Previous Pages		
TYPE OF ESTATE: Displays Information Entered From Previous Pages		
FILING PARTY'S RELATIONSHIP TO ESTATE: Displays Information Entered From Previous Pages		
PLEADING OR DOCUMENT FILED: Displays Information Entered From Previous Pages		
NAME OF FILING PARTY (NOT COUNSEL FOR THE PARTY): Displays Filing Party Name	ADDRESS: 1111 Any Street City, State Zip Code	
TO THE CLERK OF ORPHANS' COURT:		
NAME OF FILING ATTORNEY OR PARTY: Displays Attorney Name	ADDRESS: 1111 Any Street City, State Zip Code	
PHONE NUMBER: XXX-XXX-XXXX	FAX NUMBER: XXX-XXX-XXXX	
SUPREME COURT ID. NO.: XXXXXX	E-MAIL ADDRESS: XXXXX.XXXX@XXXXX.XXX	
OTHER PARTIES:		

Summary Page Continued

Court Use Only Information	
DATE OF BIRTH:	IS NOTICE REQUIRED?
DATE OF DEATH:	IF CITATION IS REQUESTED: WAS CITATION AGAINST RESPONDENT PREVIOUSLY ISSUED?
REGISTER OF WILLS NO.:	HAS ANOTHER PETITION BEEN DECIDED IN THIS CASE?
DATE OF DEED OF TRUST:	IS ANOTHER PETITION PENDING?
SSN / EIN:	

Documents
Displays Uploaded Document(s) File Name & Size

Payment Information
Displays Payment Type Selected

I have read the information supplied above and verify that subject to penalties relating to unsworn falsification to authorities, the above information is true and correct.

Check to acknowledge

[<< Back](#) [Submit](#)

Confirmation of Submission

Congratulations! [View Preliminary Cover Sheet](#)

Your case was submitted successfully, please record the e-file control number for your records.

Date Submitted to Clerk: November 18, 2016 14:41

E-File No.: 1611100151

Confirmation No.: 4B1B207B6

Filing Fee: If applicable

You will be notified by e-mail when your pleading or legal paper has been approved or rejected by the Clerk. If rejected, the e-mail will provide the reasons.

If you do not receive an approval or rejection within six (6) business hours and the filing fee has been paid contact the Clerk at (215) 686-2230.

You are reminded that Pa.O.C Rule 4.7(c) requires that a hard copy of the legal paper you have filed electronically shall be signed and, as applicable, verified concurrently with the electronic filing of the legal paper, and shall be maintained by you for five (5) years after the final disposition of the case.

You must file the original of a legal paper or exhibit with the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa. O. C. Rule 4.7(b)(2).

[Go back to main menu](#)

E-mail from Court Submitted for Review

Dear *email_recipient,

Your Orphans' Court Division electronically filed pleading or legal paper has been submitted successfully to the Clerk of the Orphans' Court of Philadelphia County.

The following information is for your records:

Date Submitted to the Clerk: *email_date_filed

Type of Pleading: *email_plead_type

E-File No.: *email_efileno

Confirmation No.: *email_conf_no

You will be notified by e-mail when your pleading or legal paper has been approved or rejected by the Clerk. If you do not receive an approval or rejection within six (6) business hours contact the Clerk's Office at (215) 686-2230.

You may check the status of your electronic filing by logging in to our Electronic Filing Web Site. Upon logging in, you may change your password, electronic and street addresses and other information.

You are reminded that Pa.O.C.R. 4.7(c) requires that a hard copy of the legal paper you have filed electronically shall be signed and, as applicable, verified concurrently with the electronic filing of the legal paper, and shall be maintained by you for five (5) years after the later of: (i) the disposition of the case; (ii) the entry of an order resolving the issue raised by the legal paper; or (iii) the disposition by an appellate court of the issue raised by the legal paper. You must produce the original or a hard copy of a legal paper or exhibit with the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa.O.C.R. 4.7(b)(2).

Thank You!

First Judicial District of Pennsylvania & Clerk of Orphans' Court

Disclaimer:

The First Judicial District will use your electronic mail address and personal information only for purpose of Electronic Filing pursuant to Pa.O.C.R. 4.7 and GCR 2004-01.

Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules and Disclaimer and agrees to comply with same.

This is an automated e-mail, please do not respond!

E-mail from Court Filing Accepted

Dear ~email_recipient,

Your Orphans' Court Division electronically filed pleading or legal paper has been accepted by the Clerk of the Orphans' Court of Philadelphia County and is now deemed filed.

The following information is for your records:

Date Submitted to the Clerk: ~email_date_filed

Date Accepted: ~email_date_accepted

Type of Pleading: ~email_plead_type

E-File No.: ~email_efilen0

You are reminded that Pa.O.C.R. 4.7(c) requires that a hard copy of the legal paper you have filed electronically shall be signed and, as applicable, verified concurrently with the electronic filing of the legal paper, and shall be maintained by you for five (5) years after the later of: (i) the disposition of the case; (ii) the entry of an order resolving the issue raised by the legal paper; or (iii) the disposition by an appellate court of the issue raised by the legal paper.

You must produce the original or a hard copy of a legal paper or exhibit with the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa.O.C.R. 4.7(b)(2)

If you have questions contact the Clerk at (215) 686-2230.

For more information about your electronic filing, log in to our Electronic Filing Web Site. Upon logging in, you may change your password, electronic and street addresses and other information.

Thank You.

First Judicial District of Pennsylvania & Clerk of Orphans' Court

Disclaimer:

The First Judicial District will use your electronic mail address and personal information only for purpose of Electronic Filing pursuant to Pa.O.C.R. 4.7 and GCR 2004-01.

Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules and Disclaimer and agrees to comply with same.

This is an automated e-mail, please do not respond!

Existing Case: If you have an Orphans' Court number and need to file a document or pleading on that matter select existing case from the main menu. The only difference between this screen and the screen generated for new cases is the case information box at the top of page 1 which requires you enter the OC number before continuing with filling and, when applicable, a control number.

Existing Case Filings

Select existing case from the main menu.

Select Orphans' Court then continue onto page 1.

The screenshot shows a web interface for filing a case. At the top, there is a pink header with 'Welcome!' in blue. Below this is a blue box containing 'Username:' and a link to 'Update Information'. To the right, the text 'Where do you want to file this case?' is followed by two radio button options: 'Orphans' Court' (which is selected) and 'Trial Division - Civil'. At the bottom left, there is a blue button with a white arrow and the text 'Existing Case'. At the bottom right, there is a dark blue button with white text 'Continue >>'.

Page 1 – Enter Case ID and complete Information

You are in Page 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |

Case Information *For subsequent pleadings only, the case and control number entered here must match an existing case previously filed.*

Orphans' Court Case Number of Control No.

Estate Information

*Last Name First Name Middle Suffix

*Entity Name, if applicable (if not an individual, maximum of 60 characters, abbreviate if necessary)

Is there an Alternative Name/A.K.A.? Yes No

*Type of Estate Select from list ---

*Name of Filing Party (Not Counsel for the Party)

Last Name First Name Middle Suffix

Entity Name, if applicable (if not an individual, maximum of 60 characters, abbreviate if necessary)

Is there an Alternative Name/A.K.A.? Yes No

Street Address City State Zip Code

*Select Filing Party Type Select from list ---

*Pleading or Document Filed Select from list ---

Continue >>

Page 2 - Continue

You are in Page 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |

Other Parties

*Last Name First Name Middle Suffix

*Entity Name, if applicable (if not an individual, maximum of 60 characters, abbreviate if necessary)

Is there an Alternative Name/A.K.A.? Yes No

*Party Type Select from list ---

*Street Address *City *State Zip Code

Add **Reset**

*Suffix Name (Example: Jr, Sr, MD, III, PhD etc.)

-- Number of Other Parties entered: 0 --

Delete

<< Back **Continue >>**

Page 3 – Continue

You are in Page 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |

***Is notice required?**

No. There are no interested parties.

Yes. Notice to plead is affixed or attached to this pleading.

Date of Notice:

Yes. All joinders/consents are attached to this pleading.

***If citation is requested:**

1. Was Citation against Respondent previously issued? Yes No

2. If yes, date of service:

*Has another petition been decided in this case? Yes No

*Is another petition pending? Yes No

If yes, identify the Judge: Select from List ---

If this is a new case, please enter the applicable information below

Date of Birth If Unknown, check here

Date of Death

Register of Wills Number - -

Date of Deed of Trust

SSN / EIN Supply EIN if Deed of Trust

The Filing Party must complete the information above. The information will only be used by the Clerk. The Clerk will not release this information to the general public

<< Back **Continue >>**

Page 4 - Continue

You are in Page 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |

***TO THE CLERK OF ORPHANS' COURT**

Kindly enter my appearance I have entered my appearance

on behalf of (check all the names below that apply)

Party Name Party Name

Electronic Service will be sent to email address listed below.
To update any information, [click here](#).

Name of Filing Attorney or Party	Name of Filing Party
Address	Address
Phone Number	City State Zip Code
Fax Number	XXX-XXX-XXXX
Supreme Court Identification No.	XXX-XXX-XXXX
E-Mail Address	Attorney ID No.
	XXX@XXXXX.XXX
Update Information	

<< Back **Continue >>**

Page 5 – Upload Document

You are in Page | 1 | 2 | 3 | 4 | **5** | 6 | 7 |


***File Attachment**
Please limit the maximum file size for each document to 10Mb

Choose a file to attach: (must be a PDF file)

Add file to the list:

[Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
<small>A file format created by Adobe®</small>		

Page 6 – Select Payment Type (If applicable) – Page will not display if no filing fee is required.

You are in Page | 1 | 2 | 3 | 4 | 5 | **6** | 7 |

Total fee for this filing: \$ 65.50

Credit Card Payment

Pay by Mail

Walk-in and pay over the counter

Are you filing In Forma Pauperis and without payment of filing fees?

Court Ordered Waiver of Filing Fee

Summary Page

You are in Page | 1 | 2 | 3 | 4 | 5 | 6 | **7** |

Final Review
All entries provided here are not considered final until the review process has been completed. Read all necessary names, parties and other information for accuracy and click on Submit.

If you went back and made changes, it is important that you refresh this page.

E-Filing # Displays E-Filing Number **SUMMARY**

Generated: Displays date and time summary sheet was generated

NAME OF ESTATE: Displays Information Entered From Previous Pages	
TYPE OF ESTATE: Displays Information Entered From Previous Pages	
FILING PARTY'S RELATIONSHIP TO ESTATE: Displays Information Entered From Previous Pages	
PLEADING OR DOCUMENT FILED: Displays Information Entered From Previous Pages	
NAME OF FILING PARTY (NOT COUNSEL FOR THE PARTY): Displays Filing Party Name	ADDRESS: 1111 Any Street City, State Zip Code
TO THE CLERK OF ORPHANS' COURT:	
NAME OF FILING ATTORNEY OR PARTY: Displays Attorney Name	ADDRESS: 1111 Any Street City, State Zip Code
PHONE NUMBER: XXX-XXX-XXXX	FAX NUMBER: XXX-XXX-XXXX
SUPREME COURT ID. NO.: XXXXXX	E-MAIL ADDRESS: XXXXX.XXXX@XXXXX.XXX
OTHER PARTIES:	

Summary Page Continued

Court Use Only Information	
DATE OF BIRTH:	IS NOTICE REQUIRED?
DATE OF DEATH:	IF CITATION IS REQUESTED: WAS CITATION AGAINST RESPONDENT PREVIOUSLY ISSUED?
REGISTER OF WILLS NO.:	HAS ANOTHER PETITION BEEN DECIDED IN THIS CASE?
DATE OF DEED OF TRUST:	IS ANOTHER PETITION PENDING?
SSN / EIN:	

Documents

Displays Uploaded Document(s) File Name & Size

Payment Information

Displays Payment Type Selected

I have read the information supplied above and verify that subject to penalties relating to unsworn falsification to authorities, the above information is true and correct.

Check to acknowledge

Confirmation of Submission

Congratulations!

[View Preliminary Cover Sheet](#)

Your case was submitted successfully, please record the e-file control number for your records.

Date Submitted to Clerk: **November 18, 2016 14:41**

E-File No.: **1611100151**

Confirmation No.: **4B1B207B6**

Filing Fee: **If applicable**

You will be notified by e-mail when your pleading or legal paper has been approved or rejected by the Clerk. If rejected, the e-mail will provide the reasons.

If you do not receive an approval or rejection within six (6) business hours and the filing fee has been paid contact the Clerk at (215) 686-2230.

You are reminded that Pa.O.C Rule 4.7(c) requires that a hard copy of the legal paper you have filed electronically shall be signed and, as applicable, verified concurrently with the electronic filing of the legal paper, and shall be maintained by you for five (5) years after the final disposition of the case.

You must file the original of a legal paper or exhibit with the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa. O.C. Rule 4.7(b)(2).

[Go back to main menu](#)

E-mail from Court Submitted for Review

Dear ~email_recipient,

Your Orphans' Court Division electronically filed pleading or legal paper has been submitted successfully to the Clerk of the Orphans' Court of Philadelphia County.

The following information is for your records:

Date Submitted to the Clerk: ~email_date_filed

Type of Pleading: ~email_plead_type

E-File No.: ~email_efileno

Confirmation No.: ~email_conf_no

You will be notified by e-mail when your pleading or legal paper has been approved or rejected by the Clerk. If you do not receive an approval or rejection within six (6) business hours contact the Clerk's Office at (215) 686-2230.

You may check the status of your electronic filing by logging in to our Electronic Filing Web Site. Upon logging in, you may change your password, electronic and street addresses and other information.

You are reminded that Pa.O.C.R. 4.7(c) requires that a hard copy of the legal paper you have filed electronically shall be signed and, as applicable, verified concurrently with the electronic filing of the legal paper, and shall be maintained by you for five (5) years after the later of: (i) the disposition of the case; (ii) the entry of an order resolving the issue raised by the legal paper; or (iii) the disposition by an appellate court of the issue raised by the legal paper. You must produce the original or a hard copy of a legal paper or exhibit with the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa.O.C.R. 4.7(b)(2).

Thank You!

First Judicial District of Pennsylvania & Clerk of Orphans' Court

Disclaimer:

The First Judicial District will use your electronic mail address and personal information only for purpose of Electronic Filing pursuant to Pa.O.C.R. 4.7 and GCR 2004-01.

Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules and Disclaimer and agrees to comply with same.

This is an automated e-mail, please do not respond!

E-mail from Court Filing Accepted

Dear ~email_recipient,

Your Orphans' Court Division electronically filed pleading or legal paper has been accepted by the Clerk of the Orphans' Court of Philadelphia County and is now deemed filed.

The following information is provided for your records:

Caption: ~email_caption

Case Number: ~email_case_id

Date Submitted to the Clerk: ~email_date_submitted

Date Reviewed, Accepted and Deemed Filed: ~email_date_approved

Type of Pleading/Legal Paper: ~email_plead_type

E-File No.: ~email_efileno

Confirmation No.: ~email_conf_no

Personal Reference No.: ~email_personal_ref_no

Filing Fee: \$ ~email_filing_fee

To retrieve the legal paper filed and any related notice, order or legal paper, log in to the Electronic Filing Web Site at <http://courts.phila.gov> using the Court-issued User Name and Password.

You may also go directly to the legal paper/document by copying and pasting the following web address(es) into your browser or by clicking the link(s) below to view the related document(s). Each link represents a separate document filed in connection with this matter. Utilizing the link(s) below will only take you to the actual document. You will not be logged into the Orphans' Court's electronic filing system. ~email_doc_url

As provided in Pa.O.C. Rule 4.3(d), service of subsequent legal papers may be effectuated by electronic transmissions as provided by that rule.

As noted below, an email message is being sent to the unrepresented parties or counsel listed below informing them that the above legal paper has been filed and is available (together with any related notice, order or legal paper) for review and retrieval on the Orphans' Court

Electronic Filing System's website: ~email_notify_txt1 ~email_notify_txt2

Therefore, counsel and unrepresented parties who are served through the Orphans' Court Electronic Filing System as disclosed above are deemed to have been served by the filing party. However, the filing party must serve the legal paper as required by applicable rules of court on all other parties to the case who were not served electronically as disclosed above, and an appropriate certificate or proof of service must be filed.

You are reminded that Pa.O.C. Rule 4.7(c) requires the filing party to maintain a signed and verified hard copy of the legal paper which is electronically filed electronically for five (5) years after the later of: (i) the disposition of the case; (ii) the entry of an order resolving the issue raised by the legal paper; or (iii) the disposition by an appellate court of the issue raised by the legal paper.

You as the filing party must produce this signed/verified hard copy of the legal paper to the Clerk within fourteen (14) days after service of a notice filed by any party pursuant to Pa.O.C. Rule 4.7(b)(2).

If you have questions contact the Clerk at (215) 686-2230.

E-mail to case parties of new filing

Dear ~email_recipient,

A legal paper has been filed electronically in connection with an Orphans' Court case in which you are counsel of record for a party, or you are an unrepresented party, and have consented to be served electronically with any pleading (other than original process) as provided in Pa.O.C. Rule 4.5. You are now deemed to have been served with the pleading below.

The following information is provided for your records:

Caption: ~email_caption

Case Number: ~email_case_id

Date Submitted to the Clerk: ~email_date_submitted

Date Reviewed, Accepted and Deemed Filed: ~email_date_approved

Type of Pleading/Legal Paper: ~email_plead_type

E-File No.: ~email_efileno

To retrieve the legal paper filed and any related notice, order or legal paper, log in to the Electronic Filing Web Site at <http://courts.phila.gov> using the Court-issued User Name and Password.

You may also go directly to the legal paper/document by copying and pasting the following web address(es) into your browser or by clicking the link(s) below to view the related document(s). Each link represents a separate document filed in connection with this matter. Utilizing the link(s) below will only take you to the actual document. You will not be logged into the Orphans' Court's electronic filing system. ~email_doc_url

New and Existing Filings:

Inserting pertinent information on pages 1 through 4:

There are three data fields on page 1 the user must complete before adding additional information on pages 2 through 4.

1. **Type of Estate** (such as Minor's Estate, Decedent's Estate etc.);
2. **Filing Party's Relationship to Estate** (such as Personal Representative, Beneficiary etc.);
3. **Pleading or Document Type** (such as Account, Petition etc.).

A complete list is attached to this User Manual as Appendix 2.

Attaching documents on page 5:

Click the "Browse Button" at the top of the page find and highlight the PDF file/document you wish to add then click the "Add File Now" button, the file name will appear in the "Current File Attachments" box. If you are attaching scanned documents or exhibits, follow the same procedure.

You may electronically insert the exhibits at the end of the electronically prepared document and submit the document as one merged file. The Standard and Professional versions of Adobe Acrobat provide an option to insert pages to a pdf document through the *Document (Pages, Insert)* menu line in the Adobe Acrobat software. Alternatively, you may attach the exhibits as a separate document; however, all exhibits should be submitted as one document.

The electronically filed document does not need to contain signatures since, as provided by Pa.O.C. Rule 4.7(c), the electronic filing of a legal paper constitutes a certification by the filing party that the original document was signed and, where applicable, verified. However, the electronic document must contain the date it was signed, and the name of the person who signed it shall be typed, preceded by "/s/" indicating that the original has been signed. Moreover, Rule 4.7(c) also requires the filing party to maintain the original signed document for a period of five (5) years.

Payment Options on page 6:

The filing fees are automatically calculated and the user must select the method of payment.

The preferred method of payment is by "Credit Card". The Court will accept three major credit cards: Visa, Mastercard and Discover. The Court will be using *VeriSign* to handle

the credit card verification process through a secured site. It should be noted that the Court will not retain any of the cardholder's credit card information in the system. The user will be required to re-enter their credit card information with each new filing.

If you select "Pay by Mail" or "Walk in and Pay Over the Counter." This means that you may submit your filing to the court, but the filing will not be reviewed by the court until the requisite filing fees have been paid within five (5) business days of submission. Failure to make payment within the specific period of time will result in rejection of the pleading and/or legal document.

If you select the In Forma Pauperis (Initial Request) payment option, it requires the completion of detailed screens which will generate a *Petition to Proceed In Forma Pauperis*. Judicial approval is required, and if the *Petition to Proceed In Forma Pauperis* is denied, you will be ordered to pay the required filing fees. If the filing fees are not paid, your filing will be rejected or dismissed. Counsel rendering pro bono service shall file an "Attorney IFP Praecipe Pursuant to Rule 240" as a separate E-Filing submission, and will thereafter be permitted to file additional pleadings without the payment of filing fees.

The final option "Court Ordered Waiver of Filing Fee" can only be selected if you attach a copy of the signed order waiving filing fees. Please note that a previously approved In Forma Pauperis Order does not constitute the waiver of filing fees going forward with existing litigation. Unless granted for the entire case each time you are filing a document or pleading that requires the submission of a filing fee you must file a new In Forma Pauperis Petition.

Final Review on page 7: This page gives you an opportunity to review the information entered on the previous pages. At the end of the page, you are required to check off that you reviewed the data and verify that it is true and correct. After verifying the information click on the "Submit" button. A pop-up box will ask a final time if you want to continue to "Submit" the filing. If you click on the "OK" button, the filing will be submitted to the court for review.



E-mail Notifications:

Immediately upon submission, you will receive an email acknowledging that the filing has been successfully submitted.

Upon review, you will receive a 2nd email notice that the filing has been accepted or rejected.

If accepted: The email will provide the case number and control number if applicable, a list of parties the court electronically served, a list of parties the court did not serve, a link to the accepted document and instructions on how to view the completed cover sheet.

If rejected: The email from the clerk and the OCEFS acknowledgement will indicate the reason for the rejection. You do not need to recreate the filing to resubmit the pleading. From EFS on the welcome page in the history section click on the e-file number of the rejected document/pleading to open the rejection reason screen. Once you open the rejection reason screen click on the "Continue" button at the bottom of the page. Make the appropriate changes to the filing then resubmit it. As provided in Phila.O.C. Rule 4.7.A(5)(d), if you disagree with the reason for the rejection, you may file a petition requesting that the legal paper be deemed filed as of the submission date. Such petition shall state the date and time of the alleged failure or rejection. A petition alleging failure of the Court's website shall state why the legal paper could not be timely filed in person in the Clerk's office. A petition alleging erroneous rejection of a legal paper shall state why the rejection was erroneous and why the legal paper could not be timely resubmitted.

<h3>E-mail acknowledgement</h3> <p>Dear</p> <p>Your Orphans' Court Division electronically filed pleading or legal paper has been rejected by the Clerk of the Orphans' Court of Philadelphia County.</p> <p>The following information is for your records:</p> <p>Date Submitted to the Clerk: January 13, 2017 12:43 EDT/DST Date Rejected: January 13, 2017 12:46 EDT/DST Type of Pleading: PET FOR APPT OF LIMITED ESTPER E-File No.: 1701100171</p> <p>To determine the specific reason why your filing was rejected, log on to the Electronic Filing Web Site.</p> <p>Please Note: Due to the fact that your pleading has not been accepted for filing, your credit card has NOT been charged. Your credit card is only charged when a pleading is accepted for filing.</p> <p>Thank You.</p> <p>First Judicial District of Pennsylvania & Clerk of Orphans' Court</p> <hr/> <p>Disclaimer:</p> <p>The First Judicial District will use your electronic mail address and personal information only for purpose of Electronic Filing pursuant to Pa.O.C.R. 4.7 and GCR 2004-01.</p> <p>Use of the Electronic Filing System constitutes an acknowledgment that the user has read the Electronic Filing Rules and Disclaimer and agrees to comply with same.</p> <hr/> <p>This is an automated e-mail, please do not respond!</p>	<h3>Welcome/History Screen</h3>  <p>January 13, 2017 12:47pm</p> <p>USER TESTING SITE</p> <p>Welcome!</p> <p>Electronic Filing History</p> <table border="1"> <thead> <tr> <th>E-File #</th> <th>Court</th> <th>Type</th> <th>Case ID</th> <th>Status</th> <th>Created</th> <th>Ref. No.</th> </tr> </thead> <tbody> <tr> <td>1701100171</td> <td>OC</td> <td>COMM</td> <td>--</td> <td>Rejected, 01/13/17</td> <td>01/13/17</td> <td></td> </tr> <tr> <td>1612100162</td> <td>CP</td> <td>MOTN</td> <td>140600098</td> <td>Draft </td> <td>12/08/16</td> <td></td> </tr> <tr> <td>1611100155</td> <td>CP</td> <td>SUBC</td> <td>140600098</td> <td>Draft </td> <td>11/29/16</td> <td></td> </tr> <tr> <td>1611100154</td> <td>CP</td> <td>SUBC</td> <td>150600135</td> <td>Draft </td> <td>11/29/16</td> <td></td> </tr> <tr> <td>1611100151</td> <td>OC</td> <td>COMM</td> <td>201605009AI</td> <td>Filed, 11/18/16</td> <td>11/18/16</td> <td></td> </tr> <tr> <td>1611100146</td> <td>OC</td> <td>SUBC</td> <td></td> <td></td> <td>11/18/16</td> <td></td> </tr> <tr> <td>1611100145</td> <td>OC</td> <td>SUBC</td> <td></td> <td></td> <td>11/18/16</td> <td></td> </tr> <tr> <td>1610100130</td> <td>CP</td> <td>COMM</td> <td></td> <td></td> <td>10/28/16</td> <td></td> </tr> <tr> <td>1610100129</td> <td>CP</td> <td>COMM</td> <td>160600225</td> <td>Filed, 10/28/16</td> <td>10/28/16</td> <td></td> </tr> <tr> <td>1610100118</td> <td>OC</td> <td>SUBC</td> <td></td> <td></td> <td>10/19/16</td> <td></td> </tr> <tr> <td>1610100117</td> <td>OC</td> <td>SUBC</td> <td></td> <td></td> <td>10/19/16</td> <td></td> </tr> <tr> <td>1610100116</td> <td>OC</td> <td>COMM</td> <td></td> <td></td> <td>10/18/16</td> <td></td> </tr> <tr> <td>1608100051</td> <td>OC</td> <td>SUBC</td> <td>20165005SN</td> <td>Draft </td> <td>08/01/16</td> <td></td> </tr> <tr> <td>1608100050</td> <td>OC</td> <td>SUBC</td> <td></td> <td></td> <td>08/01/16</td> <td></td> </tr> <tr> <td>1607100046</td> <td>CP</td> <td>SUBC</td> <td>150600135</td> <td>Draft </td> <td>07/28/16</td> <td></td> </tr> </tbody> </table> <h3>Rejection Reason Screen</h3>  <p>January 13, 2017 12:48pm</p> <p>USER TESTING SITE</p> <p>Rejected</p> <p>Your legal paper or pleading is rejected because of the following reasons:</p> <p>Please Note: Due to the fact that your pleading has not been accepted for filing, your credit card has NOT been charged. Your credit card is only charged when a pleading is accepted for filing.</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. Missing or incomplete affidavit or verification. <input checked="" type="checkbox"/> 2. Missing decree page. <input type="checkbox"/> 3. Failed to include consents of all parties in interest OR copies of twenty day notice letters (Orphans' Court Rule 1.2A). <input type="checkbox"/> 4. The proper fee was not paid. The proper fee is \$ <u>0.00</u> <input type="checkbox"/> 5. This matter should not be filed in Orphans' Court. <input type="checkbox"/> 6. A parent CANNOT be appointed as sole guardian of a minor's estate (20 Pa C.S.A.5112(3)). <input type="checkbox"/> 7. <p>* Required Field</p> <p>User Accepts/Agrees to Rules/Agreements</p> <p>Documents: Preliminary CoverSheet 1-4-17 orders.pdf</p> <p><input type="checkbox"/> Check here if you want to re-submit this pleading as part of an "Existing Case"</p> <p><< Back Continue >></p>	E-File #	Court	Type	Case ID	Status	Created	Ref. No.	1701100171	OC	COMM	--	Rejected, 01/13/17	01/13/17		1612100162	CP	MOTN	140600098	Draft	12/08/16		1611100155	CP	SUBC	140600098	Draft	11/29/16		1611100154	CP	SUBC	150600135	Draft	11/29/16		1611100151	OC	COMM	201605009AI	Filed, 11/18/16	11/18/16		1611100146	OC	SUBC			11/18/16		1611100145	OC	SUBC			11/18/16		1610100130	CP	COMM			10/28/16		1610100129	CP	COMM	160600225	Filed, 10/28/16	10/28/16		1610100118	OC	SUBC			10/19/16		1610100117	OC	SUBC			10/19/16		1610100116	OC	COMM			10/18/16		1608100051	OC	SUBC	20165005SN	Draft	08/01/16		1608100050	OC	SUBC			08/01/16		1607100046	CP	SUBC	150600135	Draft	07/28/16	
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1607100046	CP	SUBC	150600135	Draft	07/28/16																																																																																																												

Service of Pleadings and Electronic Service (E-Service):

New Case Filing: The filing party is responsible for serving the electronically filed pleading, as provided by rules of court, on all interested parties, and shall file a certification of service, proof of service, or an affidavit of service, as may be required by the applicable rules.

Existing Case Filing: Service of all electronically filed pleadings will be effected through the OCEFS on those parties, and counsel for the parties, who have agreed to accept service by electronic transmission or who have filed an entry of appearance or other legal paper containing an electronic mail address. Your email will indicate which parties have been served electronically by the OCEFS and which parties must be served through other means by the filing party.

Important Reminders:

Accounts: Must be filed together with a Petition for Adjudication. The Account should be filed as the primary pleading so that Accounts can be properly tracked and OCEFS can calculate the applicable filing fee. The Petition for Adjudication should be uploaded as a separate PDF. Accordingly, only one electronic submission is necessary, containing both the Account and the Petition for Adjudication.

Redaction: As required by Phila.O.C. Rule 4.7.A.(4), the Clerk will redact the following datafields from electronically filed documents (excluding exhibits): the name of the minor in minors' estates; social security numbers; dates of birth; financial account numbers; and home addresses. The Clerk will display these redacted documents to the general public, and shall display the unredacted documents to the Court and parties to the case.

If you have any questions about the above materials or encounter any problems or issues you wish to bring to our attention, please email us at:

ocsupport@courts.phila.gov.

Appendix 1

Electronic Filing Rules

(Effective date: September 1, 2016)

Pennsylvania Orphans' Court Rules

Pa. O.C. Rule 1.3. Definitions

Pa. O.C. Rule 3.13. Verifications

Pa. O.C. Rule 4.7. Electronic Filing

Philadelphia Orphans' Court Division Rules

Phila. O.C. Rule 4.7A. Electronic Filing and Service of Legal Papers

Pennsylvania Orphans' Court Rules

Rule 1.3. Definitions

The following words and phrases when used in these Rules shall have the following meanings, respectively, unless the context clearly indicates otherwise or the particular word or phrase is expressly defined in the Chapter in which the particular Rule is included:

- “Accountant”**--a fiduciary or other party who has filed an Account;
- “Account”**--a financial report by a fiduciary of the principal and income transactions in the form prescribed by Rule 2.1, excluding the annual reports of Guardians;
- “Adult”**--an individual eighteen years of age or over;
- “Clerk”**--the Clerk of the Orphans' Court Division or its equivalent;
- “Commonwealth”**--the Commonwealth of Pennsylvania;
- “Court”**--the Orphans' Court Division of the Court of Common Pleas or any judge thereof having jurisdiction;
- “Electronic Filing”**--the electronic transmission via the internet of a legal paper to the clerk;
- “Facsimile copy”**--a copy of a document transmitted and received by facsimile equipment;
- “Fiduciary”**--an agent under a power of attorney, custodian under the Uniform Transfers to Minors Act, personal representative, guardian, trustee, guardian *ad litem*, or trustee *ad litem*, and any other person acting in any similar capacity, whether domiciliary or ancillary, individual or corporate, subject to the jurisdiction of the court;
- “Filing Party”**--a party, or an attorney acting on behalf of a party, who files a legal paper;
- “Guardian”**--a fiduciary who has the care and management of the estate, the person, or both, of a minor or an incapacitated person;
- “Guardian *ad litem* or Trustee *ad litem*”**--a fiduciary who is appointed by a court in a legal proceeding to represent an individual or class of individuals under a legal disability;
- “Incapacitated Person”**--a person determined to be incapacitated under the provisions of Chapter 55 of Title 20 (relating to incapacitated persons);
- “Interested Party”**--one or more individuals or entities having or claiming an interest in the estate, trust, person or other entity that is the subject of the legal proceeding;
- “Legal Paper”**--a document that is filed with the court;
- “Local Rule”**--every Rule promulgated in accordance with Rule 1.5;
- “Majority”**--when used in reference to age, means of the age of eighteen years or over;
- “Minor”**--an individual under the age of eighteen years;
- “Motion”**--if in writing, a legal paper that must be signed, but does not need to be verified, does not plead any facts not of record, and does not require the court to obtain jurisdiction over an Interested Party;

“Objector”--an individual or entity filing objections to an Account and/or Petition for Adjudication/Statement of Proposed Distribution pursuant to Rule 2.7;

“Personal Representative”--the executor or administrator of any description of a decedent's estate;

“Petition for Adjudication/Statement of Proposed Distribution”--a uniform, statewide form promulgated by the Supreme Court used in conjunction with the filing of an Account (see Appendix of forms);

“Pleading”--a type of legal paper that must be signed and verified in accordance with Rules 3.12 and 3.13 and includes, but is not limited to, petitions, answers, replies, and certain preliminary objections;

“Publication”--the publication in a newspaper of general circulation where such newspaper is originally issued and circulated;

“Register of Wills” or “Register”--the Register of Wills or its equivalent having jurisdiction or authority to probate wills and grant letters as provided by 20 Pa.C.S. § 901;

“Supreme Court”--the Supreme Court of the Commonwealth;

“Verified”--when used in reference to a written statement of fact, means supported by the signer's oath or affirmation or made subject to the penalties of 18 Pa.C.S. § 4904 relating to unsworn falsification to authorities.

Note: This definitional section is new; but, some of the definitions are substantively identical to the definitions in former Rule 2.3 and other definitions are taken from and are similar to Pa.R.C.P. No. 76.

Adopted Dec. 1, 2015, effective Sept. 1, 2016.

Rule 3.13. Verification

(a) Every pleading shall be verified, averring as true every fact not appearing of record in the action or containing a denial of fact based upon the signer's personal knowledge or information and belief. A pleading may be verified upon personal knowledge as to a part and upon information and belief as to the remainder. The signer need not aver the source of the information or expectation of ability to prove the averment or denial at the trial.

(b) If a pleading contains averments that are inconsistent in fact, the verification shall state that the signer has been unable after reasonable investigation to ascertain which of the inconsistent averments, specifying them, are true but that the signer has knowledge or information sufficient to form a belief that one of them is true.

(c) The verification shall be made by one or more of the parties filing the pleading unless all the parties (1) lack sufficient knowledge or information, or (2) are outside the jurisdiction of the court and the verification of none of them can be obtained within the time allowed for filing the pleading. In such cases, the verification may be made by any person having sufficient knowledge or information and belief and shall set forth the source of the person's information as to matters not stated upon his or her own knowledge and the reason why the verification is not made by a party.

Note: Rule 3.13 has no counterpart in former Orphans' Court Rules, but is derived from Pa.R.C.P. No. 1024.

Adopted Dec. 1, 2015, effective Sept. 1, 2016.

Rule 4.7. Electronic Filing

(a) Authorization for Electronic Filing. A court may permit or require electronic filing of legal paper. Any court that implements electronic filing shall establish procedures governing such filing by local rule, which shall not be inconsistent with the procedures set forth herein.

(b) Electronic Filing of Legal Paper.

(1) If implemented by court, a filing party may file a legal paper with the clerk by means of electronic filing.

(2) Any party may require the filing party to file the original of a legal paper or exhibit by filing a notice to file with the clerk and serving a copy of the notice upon the filing party. The filing party shall file the specified document with the clerk within 14 days after service of the notice. The court for any reason may direct any party to file the original of a legal paper or exhibit with the clerk within the time specified in the order. Upon disposition of the matter before the court, an original document may be returned to the party who filed it or retained by the court, as the court may determine.

(c) Signature, Verification and Retention of Legal Paper.

(1) The original legal paper shall be properly signed, and where required, verified.

(2) The electronic filing of a legal paper constitutes a certification by the filing party that the original document was signed, and where applicable, verified.

(3) Unless retained by the court, the filing party shall maintain the original of all documents so certified, together with any exhibits filed, for 5 years after the final disposition of the case.

(d) Website and Filing Date.

(1) The court shall designate a website for the electronic filing of legal paper. A user name and password shall be issued to authorized users.

(2) The court shall provide electronic filing access at all times. The time and date of the filing shall be that registered by the court's computer system.

(3) The court shall provide, through its website, an acknowledgement from the clerk that the filing has been processed. Such acknowledgement shall include the date and time of filing in a form which can be printed for retention by the filing party.

(e) Delay in Filing. A filing party shall be responsible for any delay, disruption, or interruption of electronic transmission, and for the legibility of the document electronically filed, except for delays caused by the failure of the court's website. The filing party may petition the court to resolve any dispute concerning an alleged failure of the court's website.

(f) Fees.

(1) A filing party shall pay the fee for electronically filing a legal paper as provided by the court.

(2) The court may assess an additional automation fee for each legal paper electronically filed which shall be used for the development, implementation, maintenance, and training in the use of the court's electronic filing system and other related uses.

Note: Rule 4.7 is substantively identical to former Rule 3.7, but has been relocated to Chapter IV of these Rules.

Adopted Dec. 1, 2015, effective Sept. 1, 2016.

EXPLANATORY COMMENT

This Rule is designed as a general enabling mechanism by which local judicial districts can, if they so choose, implement electronic filing. Implementation procedures not inconsistent with this Rule will be determined by local rules of court.

Those jurisdictions which require e-filing must also provide the necessary technical assistance to those parties who lack the capacity to electronically file legal paper.

Nothing in this Rule is intended to change the procedural requirements of Orphans' Court practice, as embodied in the statutes and rules of court. Rather, this Rule is intended to facilitate the delivery of legal paper to the court and the parties, as well as to reduce record management burdens in the office of the clerk. The terms "electronic filing," "filing party," and "legal paper" are defined in Rule 1.3.

The court may, from time to time, modify the approved electronic filing system to take into consideration the costs and security of the system and the maintenance of electronic data and images.

Pa.O.C. Rule 4.7, 20 Pa.C.S.A. foll. Ch. 7, PA ST ORPHANS CT Rule 4.7

Current with amendments received through December 1, 2016.

Philadelphia Orphans' Court Rule

Rule 4.7A. Electronic Filing and Service of Legal Papers.

(1) Electronic Filing. Parties shall file all legal papers with the Clerk by means of electronic filing.

(2) Website, Username and Password.

(a) Website. The Orphans' Court Electronic Filing System shall be available at all times at the Court's website address, <http://courts.phila.gov>, or at such other website as the Court may designate from time to time.

(b) Username and Password. To obtain access to the Orphans' Court Electronic Filing System, counsel or a party not represented by counsel ("filing party") shall apply for a Username and Password at the Court's website.

(3) Electronic Filing of Legal Paper.

(a) A filing party shall file all legal papers and exhibits at the Court's website.

(b) The Clerk shall not maintain a hard copy of any legal paper or exhibit filed electronically under this Rule.

(c) A hard copy of the legal paper shall be signed and, as required, verified prior to the electronic filing of the legal paper, and the filing party shall retain such hard copy as required by Pa. O.C. Rule 4.7(c).

(4) Redaction and Access.

(a) All legal papers and exhibits filed electronically shall be available electronically to the filing parties, as the Court may provide from time to time. The Clerk shall maintain computer terminals in the Clerk's office for this purpose.

(b) The Clerk shall provide public access to a redacted copy of electronically-filed legal papers and exhibits, as the Court may provide from time to time. The Clerk shall maintain computer terminals in the Clerk's office for this purpose.

(c) The Clerk shall redact the following personal data identifiers from an electronically filed legal papers, including the Cover Sheet but excluding exhibits, for public access:

(i) The name of the minor in minors' estates.

(ii) Social Security numbers.

(iii) Dates of birth.

(iv) Financial account numbers.

(v) Home addresses.

(d) A filing party shall redact the personal data identifiers listed in subsection (c) from all exhibits to a legal paper. The Clerk shall not review

exhibits to determine whether personal data identifiers have been redacted.

(5) Filing Date.

(a) Immediately upon receipt of the legal paper, the Clerk shall provide the filing party with email notification that the legal paper has been received by the Court's Electronic Filing System.

(b) Within six (6) business hours of receipt of the legal paper, the Clerk shall provide the filing party with email notification that the legal paper has been accepted for filing or rejected.

(c) A legal paper accepted for filing shall be deemed to have been filed as of the date and time it was received by the Court's Electronic Filing System. If a legal paper is rejected, the Clerk shall specify the reason. Subject to the provisions of subsection (d), a rejected legal paper shall be deemed as not having been filed.

(d) Any filing party for whom the failure of the Court's website or the erroneous rejection of a legal paper resulted in an untimely filing may file a petition requesting that the legal paper be deemed filed as of the submission date. Such petition shall state the date and time of the alleged failure or rejection. A petition alleging failure of the Court's website shall state why the legal paper could not be timely filed in person in the Clerk's office. A petition alleging erroneous rejection of a legal paper shall state why the rejection was erroneous and why the legal paper could not be timely re-submitted.

(6) Automation Fee. Payment of Filing Fees.

(a) The Clerk shall collect, in addition to all other applicable fees, an automation fee of \$10.00 for each legal paper for which a filing fee is now charged.

(b) The Clerk is authorized to charge the sum of \$1.00 per page for each page of a legal document or exhibit which is not filed in pdf.

(c) All fees collected pursuant to this Rule shall be set aside by the Clerk and remitted to the First Judicial District and shall be used by the Court consistent with Pa. O.C. Rule 4.7(f)(2).

(d) The Clerk shall not accept a legal paper as filed before payment of the required filing fee.

(7) Local Procedures. The Court may develop further administrative procedures, as needed, to implement this Rule and to provide for security of the electronic filing system, as required by changing technology. All such administrative procedures shall be posted on the Court's website.

Appendix 2

Orphans' Court Case Types

Orphans' Court Party Types

Orphans' Court Pleading Types

ORPHANS' COURT CASETYPES

	CASETYPE	DESCRIPTION	ACTIVE IND
1	AI	ALLEGED INCAPACITATED PERSONS	Y
2	AP	APPEAL FROM REGISTER	Y
3	CF	CORPORATE FIDUCIARIES	Y
4	CM	CEMETERY TRUSTS	Y
5	DE	DECEDENTS ESTATE	Y
6	IC	INCAPACITATED PERSONS	Y
7	IP	INALIENABLE PROPERTY	Y
8	IV	INTER VIVOS TRUST	Y
9	IX	INDEXED CASE	N
10	MI	MINORS	Y
11	ML	MARRIAGE APPLICATION AMENDMENT	Y
12	NP	NON PROFIT CORPORATIONS	Y
13	PD	PRESUMED DECEDENTS	Y
14	PR	POWER OF ATTORNEY	Y
15	SN	SPECIAL NEEDS TRUST	Y
16	ST	TESTAMENTARY TRUSTS	Y
17	VC	VECCHIONE GUARDIAN	Y

ORPHANS' COURT ACTIVE PARTY TYPES

	PARTY TYPE	DESCRIPTION
1	ACCT	ACCOUNTANT
2	ADTR	AUDITOR
3	AFCF	ATTORNEY IN FACT CORP FID/SURE
4	AFIN	ATTORNEY IN FACT INDIVIDUAL
5	AFPR	ATTORNEY IN FACT PERSONAL
6	AGAR	ATTORNEY FOR GUARDIAN
7	AGCY	AGENCY
8	AIPR	ALLEGED INCAPACITATED PERSON
9	AMCR	AMICUS CURIAE
10	APE	APPELLEE
11	APP	APPELLANT
12	ATTY	ATTORNEY
13	BFRY	BENEFICIARY
14	CFSR	CORPORATE FIDUCIARY/SURETY
15	CHLD	CHILD
16	CLNT	CLAIMANT
17	CRDT	CREDITOR
18	CRPV	CARE PROVIDER
19	CSPT	CUSTODIAL PARENT
20	DCDT	DECEDENT
21	EXMR	EXAMINER
22	FTHR	FATHER
23	GETA	GUARDIAN/AGENCY
24	GETI	GUARDIAN/INSTITUTION
25	GETO	GUARDIAN/OTHER ORGANIZATION
26	GETR	GUARDIAN/RELATIVE
27	GETV	GUARDIAN/OTHER INDIVIDUAL
28	GRAL	GUARDIAN AD LITEM
29	GROF	GUARDIAN OFFICER
30	ICPR	INCAPACITATED PERSON
31	INAP	INALIENABLE PROPERTY
32	INPR	INTERESTED PARTY
33	ITTH	INTESTATE HEIR
34	JUDG	JUDGE
35	MEDI	MEDIATOR
36	MINR	MINOR
37	MTHR	MOTHER
38	NNPR	NON PROFIT CORPORATION
39	PDCT	PRESUMED DECEDENT
40	PETA	PETITIONER/AGENCY
41	PETI	PETITIONER/INSTITUTION

ORPHANS' COURT ACTIVE PARTY TYPES

	PARTY TYPE	DESCRIPTION
42	PETO	PETITIONER/OTHER ORGANIZATION
43	PETR	PETITIONER/RELATIVE
44	PETV	PETITIONER/OTHER INDIVIDUAL
45	PRCF	PERSONAL REP CORP FID/SURETY
46	PRIN	PERSONAL REPRESENTATIVE INDIVI
47	PROS	PRO SE FILER
48	PRPL	PRINCIPAL
49	PRRP	PERSONAL REPRESENTATIVE
50	RES	RESPONDENT
51	SPSE	SPOUSE
52	STLR	SETTLOR
53	TRCF	TRUSTEE CORP FIDUCIARY/SURETY
54	TRIN	TRUSTEE INDIVIDUAL
55	TRST	TRUSTEE

ORPHANS' COURT ACTIVE PLEADING TYPES

	PLEADING TYPE	DESCRIPTION
1	ACCAM	AMENDED ACCOUNT
2	ACCNT	ACCOUNT
3	ADDFL	ADDENDUM
4	ADPFL	AUDIT PAPERS
5	AFDVF	AFFIDAVIT
6	ALRPT	AD LITEM REPORT
7	AMPTN	AMENDED PETITION
8	ANLRP	ANNUAL REPORT
9	ANNWM	ANSWER WITH NEW MATTER
10	ANSWR	ANSWER
11	APEOF	ELECT TO TREAT ORDER AS FINAL
12	APPRS	PRAECIPE TO STRIKE APPEAL/1701
13	APSMT	STATEMENT OF MATTERS (1925(B))
14	APSPP	APPEAL TO APPELLATE COURT
15	ATIFP	ATTORNEY IFP PRAECIPE/RULE 240
16	BRIEF	BRIEF
17	CLAIM	NOTICE OF CLAIM
18	DISCL	DISCLAIMER
19	ENAPP	ENTRY OF APPEARANCE
20	FMLAG	FAMILY AGREEMENT
21	FNLRP	FINAL REPORT
22	FNRPD	FINAL REPORT-DECEASED
23	INVNT	GUARDIAN INVENTORY
24	MEMLW	MEMORANDUM OF LAW
25	MOJPL	MOTION-JUDGMENT ON PLEADINGS
26	MORCS	MOTION FOR RECONSIDERATION
27	MOSJD	MOTION-SUMMARY JUDGMENT
28	NTAPL	ROW NOTICE OF APPEAL
29	NTCDT	SUGGESTION OF DEATH
30	OBJCT	OBJECTIONS FILED
31	OMISC	MISCELLENOUS ENTRY
32	PASNT	PETITION SPECIAL NEEDS TRUST
33	POATT	POWER OF ATTORNEY
34	PRACP	PRAECIPE
35	PRLOB	PRELIMINARY OBJECTIONS
36	PRODP	PROOF OF DEPOSIT
37	PROFC	PROPOSED FACTS & CONCLUSIONS
38	PROSR	PROOF OF SERVICE
39	PTAAL	PET FOR APPT OF AD LITEM
40	PTACT	PET FOR ORDER TO FILE ACCOUNT
41	PTADC	PET FOR ADJUD OF CAPACITY

ORPHANS' COURT ACTIVE PLEADING TYPES

	PLEADING TYPE	DESCRIPTION
42	PTAEG	PET FOR APPT OF EMERGENCY GRDN
43	PTAGM	PET APPT GUARDIAN MINOR
44	PTALB	PET FOR APPT OF LIMITED ESTPER
45	PTALL	PETITION FOR ALLOWANCE
46	PTALP	PET FOR APPT OF LIMITED PERSON
47	PTALS	PET FOR APPT OF LIMITED ESTATE
48	PTAPB	PET FOR APPT OF PLENARY ESTPER
49	PTAPC	PET FOR APPOINTMENT OF COUNSEL
50	PTAPE	PETITION TO APPOINT EVALUATOR
51	PTAPP	PET FOR APPT OF PLENARY PERSON
52	PTAPS	PET FOR APPT OF PLENARY ESTATE
53	PTASC	PET FOR APPT OF SUCC CUSTODIAN
54	PTATY	PET FOR LETTERS AFTER 21 YRS
55	PTBRE	PETITION TO BUY REAL ESTATE
56	PTCFA	PETITION FOR CIT TO FILE ACCT
57	PTCMC	PET TO COMP MINORS ACTION
58	PTCPF	PET TO ACT AS CORP FIDUCIARY
59	PTCTA	PET FOR CIT FOR ATTACHMENT
60	PTCTN	PETITION FOR CITATION
61	PTDFT	PETITION FOR DEFAULT
62	PTEXG	PET TO EXTEND GRDN OF PERSON
63	PTFIT	PET FOR CIT TO FILE INHER TAX
64	PTFND	PETITION FOR FINDING OF DEATH
65	PTGDD	PET FOR GUARDIANS DISCHARGE
66	PTINJ	PRELIMINARY INJUNCTION
67	PTION	PETITION
68	PTIPC	PETITION FOR IPS COMPROMISE
69	PTPCE	PETITION FOR EVALUATORS COSTS
70	PTRVH	PETITION FOR REVIEW HEARING
71	PTSBG	PET FOR SUBSTITUTE GUARDIAN
72	PTSRE	PETITION TO SELL REAL ESTATE
73	PTSSE	PET TO SETTLE SMALL ESTATE
74	PTWDS	PETITION TO COMPROMISE WD&SA
75	PTWRA	PET FOR WRIT OF ATTACHMENT
76	RPNMA	REPLY TO NEW MATTER
77	SCHDF	SCHEDULE OF DISTRIBUTION
78	SETAG	SETTLEMENT AGREEMENT
79	SPELE	SPOUSAL ELECTION AGAINST WILL
80	SRENT	SECURITY (BOND)
81	STPFL	STIPULATION
82	STSAW	SATISFACTION OF AWARD

ORPHANS' COURT ACTIVE PLEADING TYPES

	PLEADING TYPE	DESCRIPTION
83	STSCCL	SATISFACTION OF CLAIM
84	SUPAD	SUPPLEMENT TO ADJUDICATION
85	WTAPO	WITHDRAWAL OF APPEARANCE
86	WTAPP	WITHDRAWAL/ENTRY OF APPEARANCE
87	WTDPT	WITHDRAWAL OF PETITION
88	WTOBJ	WITHDRAWAL OF OBJECTIONS