

INSTRUCTIONS FOR FILLING OUT THE CHECKLISTS:

You must complete steps 1 through 3 when filling out a checklist before e-filing.

1. Right click on the applicable checklist.
2. Save the file on your local computer. Do not complete the checklist in your web browser as information will not be saved. Use the checklist saved to your local computer. If you need to access the checklist later, save the file on your local computer as you would any other pdf file.
3. When the checklist is complete save for electronic filing via the E-Filing Authority Portal.

If you do not have a case number, leave the text box for case number blank and insert the name of the estate in the corresponding text box.

INSTRUCTIONS FOR E-FILING THE CHECKLISTS:

1. The applicable checklist must be filed at the same time as the corresponding petition.
2. The checklist must be uploaded as a separate document in the filing. However, the corresponding petition **MUST** be the first document uploaded.
3. When e-filing a checklist through the e-Portal, please select the description: “Court Mandated Checklist” followed by the appropriate type of petition. For example, if you are e-filing a Petition to Determine Homestead, you should select the following description: “Court Mandated Checklist – Petition to Determine Homestead.” Please note that during the week of January 11, 2016 you might only be able to select the option “Court Mandated Checklist” for all mandatory checklists, as the Clerk’s Office is in the process of updating the description for each checklist.

Please remember that the Clerk’s Office **WILL NOT** forward any of the following petitions to the court for review until the corresponding checklist is e-filed:

- 1) Petition for Disposition of Personal Property without Administration
- 2) Petition to Determine Homestead
- 3) Petition for Formal Administration of Intestate Estate
- 4) Petition for Summary Administration of Intestate Estate
- 5) Petition for Formal Administration of Testate Estate
- 6) Petition for Summary Administration of Testate Estate
- 7) Petition for Formal Ancillary Administration
- 8) Petition for Summary Ancillary Administration
- 9) Petition for Discharge.