PUBLIC NOTICE

NOTICE OF PROPOSED LOCAL RULE 3.03

In accordance with Ohio Civ.R. 83(B), notice is hereby given of the proposed Local Rule 3.03 to the Local Rules of the Cuyahoga County Court of Common Pleas, Probate Division. The proposed rule is listed below and would be effective December 1, 2026.

Comments regarding the proposed rule can be forwarded in writing for consideration to Courtney Verardi, Staff Attorney for Judge Anthony J. Russo and Judge Laura J. Gallagher at the Probate Court, 1 W. Lakeside Avenue, Cleveland, Ohio 44113, on or before November 23, 2026.

RULES GOVERNING THE COURTS OF OHIO
CUYAHOGA COUNTY – RULES OF THE COURT OF COMMON PLEAS
Probate Division

Rule 3.03 **Court Technology Plan**

In accordance with Sup. Rule 4.12(B)(18)(c) and 3.03, the Court has adopted and maintains a Court technology plan which includes the following:

(A) A comprehensive strategy for implementing and maintaining technology solutions for conducting remote hearings, electronic service, the acceptance of electronic signatures, and any other technology-related solutions utilized by the Court or division; and

(B) Procedures for notifying and providing instructions to the public on how to use the technology solutions implemented by the Court and how the solutions will comply with any accessibility accommodation requirements, including any applicable requirements of the "Americans with Disabilities Act."

The Court's technology plan is set forth in Appendix A.

(History: Effective 12-1-26)

APPENDIX A

CUYAHOGA COUNTY COURT OF COMMON PLEAS
PROBATE DIVISION

TECHNOLOGY PLAN

In accordance with Sup. Rule 4.12(B)(18)(c) and 3.03, this Technology Plan provides an overview of the Cuyahoga County Probate Court's utilization of technology in the delivery of court services and maintenance of judicial operations. The applications outlined in this Technology Plan include both public-facing technologies serving litigants, attorneys, members of the public, and other justice system stakeholders, as well as internal technology systems utilized by judicial officers and Court staff. IT infrastructure information is not included in this list for safety and security reasons, including firewall, storage system, backup, anti-virus, disaster recovery, and cyber security.

The purpose of this Plan is to:

- Define how the Court uses technology to support case management, case filing, recordkeeping, communications, and administrative functions for the benefit of attorneys, parties, and the public served by the Court.
- Provide a list of the Court's IT functions and applications that support serving the public
- Identify opportunities for improved efficiency and cost savings supported by technological solutions
- Promote the alignment of IT initiatives with the goals of the Court

The following applications are used in the performance of:

- Case Management
- Clerk Functions
- Filing
- Fiscal
- Hearings
- Interfacing with Other Entities
- Records Management/Retention
- Special Accommodations
- Website

A. Case Management

The Court uses the following applications for manage its docket and related case records:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Probate CMS	Case management software utilized by Court staff	Vendor training materials and IT staff	Court staff

The Court utilizes *Probate CMS*, a case management system provided by Proware, to manage court operations and case-related information. Probate CMS provides functions such as docketing, case financial management, and data reporting capabilities. The system is utilized by Court staff and is integrated with the Court's website to provide public access features, including the Online Docket and Index. All employees receive training on the use of Probate CMS as part of the onboarding process.

B. Clerk Functions

The Court uses the following applications to perform its clerk-related functions:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Probate CMS	Case management software utilized by Court Staff	Vendor training materials and IT staff	Court staff
Microsoft Outlook	Electronic mail software used for general communication with the public and Court parties	IT staff	Court staff
Microsoft 365	Workflow document generation; outgoing mail correspondence	IT staff and Department Supervisors	Court staff
Telephones	Hardware used for general communication with the public and Court staff	IT staff	Court staff
Microsoft Teams	Secure communication across all Court departments	IT staff	Court staff
Kodak Scanners/Kofax Software	This program scans in paper documents and images them into our CMS application as well as for publishing to the public web docket for viewing/copying	Vendor training materials and IT staff	Imaging Department, IT Staff
Extract Systems ID Shield	This program takes all digital case file images and runs them through a redaction process that will redact Court defined sensitive data	Vendor training materials and IT staff	Imaging Department, IT staff
RightFax FaxUtil	Provides method of sending and receiving documents between patrons and Court Staff	Clerks, IT staff	Court staff, County DoIt

The Court uses the *Probate CMS* to manage case docketing, send notices to parties and attorneys, and maintain current contact information. The system is integrated with the Court's website to provide public access to case information and the Online Docket and Index.

The Court utilizes *Microsoft Outlook, the telephone system, and Microsoft Teams* as its primary communication tools for internal and external operations. These platforms support communication with

the public, attorneys, partner agencies, and Court staff while facilitating email correspondence, calendar management, meeting scheduling, and the exchange of information.

The Court utilizes *Kodak scanners* with Kofax software to digitize paper documents and securely upload them into the Court's case management system for internal use and public web docket access. *Extract Systems ID Shield* is used to automatically identify and redact confidential information from digital case records, in an effort to comply with privacy and public access concerns.

The Court utilizes *RightFax FaxUtil* which allows Court employees to securely send, receive, review, and manage faxed documents from court patrons, attorneys, agencies, and other external parties as part of daily court operations.

C. Filing
The Court uses the following applications to manage the filing of court documents:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Probate CMS	Case Management System used to file and store paper filings	Email, Telephone, Court website, and guides	Proware, IT staff
Electronic Filing Gateway	Online gateway system to submit and store electronic filings	Email, Telephone, Court website, and guides	Proware, IT staff

The Court utilizes *Probate CMS* to docket and store images of paper filings submitted to the Court. Court staff use Probate CMS to maintain case records, manage filing information, and ensure the accurate retention of documents within the official case file.

The Court also utilizes the *Electronic Filing Gateway*, an online filing system used to submit documents for filing. The Electronic Filing Gateway allows registered patrons and attorneys to electronically file documents with the Court, providing a secure and efficient method for filing and maintaining case records.

D. Fiscal
The Court uses the following applications for financial management and accounting:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
INFOR	Used to manage the Court’s core financial operations, budgeting, payroll, and contract payments	Vendor training materials	Court Administration and Finance Deputy Director
Probate CMS	Manages all methods of payments, refunds, and reporting for Court filings and cases	Clerk’s Office Finance staff	Clerk’s Office

Point-N-Pay	Web application used to receive and verify payments and/or refunds for credit and debit card purchases at Court	Clerk's Office Finance staff; Vendor training materials	Clerk's Office
Microsoft Excel	Used to collect and organize data	Vendor training materials	Court Administration

The Court utilizes *INFOR,* Cuyahoga County's financial management system, to manage core financial operations, including budgeting, payroll processing, accounts payable, purchasing, and contract payments. The system is used by authorized Court personnel to ensure accurate financial reporting and compliance with County fiscal requirements.

The Court utilizes *Microsoft Excel* to collect, organize, analyze, and maintain data. Excel is used by Court staff for reporting, tracking operational metrics, and managing financial and administrative information.

E. Hearings

The Court uses the following applications to conduct hearings and related proceedings (e.g., remote hearings and digital recording software):

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
BIS equipment and DCR software	Recording hardware and software used to record, store, and transcribe audio from Court hearings	Vendor training materials and IT staff	Judges, Magistrates, Administrative Assistants and IT staff
Telephone	Conduct hearings for remote parties	Telephone	Court staff
Zoom	Conduct and record hearings for remote parties	E-mail or notices	Court staff

The Court utilizes *BIS equipment and DCR software* to record, store, and manage audio recordings of Court hearings and proceedings. These systems support the creation, retention, and transcription of the official record as needed.

The Court utilizes its *telephone system* and *Zoom* to conduct and record remote hearings and allow remote participation in court hearings and proceedings when authorized by the Court.

F. Interfacing with Other Entities

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Ohio Courts Network (OCN)	Conduct background checks	Vendor training materials and IT staff	Judges and Magistrates

Ohio Supreme Court eStats Portal	Submission of quarterly case statistics	Vendor training	Court Administration
Bureau of Criminal Investigation (BCI)	Report findings of Mental Illness	Vendor training materials	Psychiatric Department
IGOR- Ohio Supreme Court	Request visiting Judge	Vendor training materials and IT staff	Court Administration
LiveScan Fingerprint Scanner	Collect fingerprints for qualifying offenses for electronic submission to Ohio Bureau of Criminal Investigation (BCI)	Vendor training materials and IT staff	Clerks Office, IT staff
Trumpia	Text message interface which allows communications via text	Court website; opt in through authorization form	Court staff
Point-N-Pay	Program used to collect and process payments for Court related costs	Vendor training materials	Court staff

The Court utilizes the *Ohio Courts Network (OCN)* to conduct authorized background checks and access information necessary for court proceedings and statutory responsibilities. The Court requires individuals who are seeking to change or conform their name to submit a Release for Criminal Background Check.

The Court utilizes the *Ohio Supreme Court eStats Portal* to compile and submit required quarterly case statistics and caseload data to the Supreme Court of Ohio as required pursuant to Sup.R. 5.30.

The Court utilizes the *Bureau of Criminal Investigation (BCI)* reporting system to submit reports and findings related to mental illness adjudications and other matters as required by law and Probate Court Local Rule 5.

The Court utilizes *IGOR*, a system maintained by the Supreme Court of Ohio, to request the assignment of visiting judges when needed to assist with court operations and case management.

The Court utilizes a *LiveScan Fingerprint Scanner* to collect fingerprints from employees and Court patrons when required by law or court process and to electronically submit fingerprint records to the Ohio Bureau of Criminal Investigation (BCI) in accordance with statutory requirements. Fingerprints are collected only for individuals who are parties to a proceeding or whose fingerprints are legally required for a case to proceed to disposition.

The Court utilizes *Trumpia*, a text messaging platform, to communicate with parties and attorneys through automated and manual text message notifications and reminders. Participation in the text messaging program is voluntary, and parties and attorneys must affirmatively opt in by completing an authorization form before receiving text messages from the Court.

The Court utilizes *Point-N-Pay*, an electronic payment processing system, to collect and process credit or debit card payments for Court related costs.

H. Records Management/Retention
The Court uses the following applications to manage and retain records:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Zoom	Hearings can be recorded and stored locally or in the cloud	IT staff	Court staff
ScanPro/E-Image Data	Microfilm reader that allows historical microfilm rolls to be viewed and images printout for filing or copies	Vendor training materials and IT staff	Court staff

The Court utilizes *Zoom*, a video conferencing platform, to conduct remote hearings, conferences, and meetings. Hearings may be recorded and securely stored either locally or in a cloud-based environment in accordance with applicable records retention and court policies.

The Court utilizes *ScanPro/E-ImageData*, a microfilm viewing and imaging system, to access, view, print, and reproduce historical records maintained on microfilm. The system allows Court staff to retrieve archived records for filing, record preservation, and the production of copies in response to requests.

I. Special Accommodations
The Court uses the following applications to provide services for participants needing special accommodations:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Language Line-Ohio Supreme Court	Foreign Language Interpreter services by telephone	Vendor training materials and IT staff	Court staff
BIS equipment and DCR software	Devices for hearing assistance if required	Vendor training materials and IT staff	Judges, Magistrates, Administrative Assistants and IT staff

The Court utilizes *Language Line*, an interpreter service approved by the Supreme Court of Ohio, to provide telephonic foreign language interpretation services for Court communications. The service helps ensure meaningful access to court services for individuals with limited English proficiency or that are hard of hearing.

The Court utilizes *BIS equipment and DCR software* to support accessibility during Court proceedings, including the use of hearing assistance devices and related technology for individuals who are hard of hearing.

J. Website

The Court uses the following application in the development and maintenance of its website:

Application	Purpose	How Users Receive Instructions	Department/Role Responsible
Court Website	Provides general information to the public about the Court, forms, and services	General information on the website	IT staff
Probate CMS	Manage and maintain content and messaging for designated areas of the Court's website and a means to request and pay for certified copies of case filings	Vendor training materials and IT staff	Court staff
Public Access/Web docket	Online docket based off the data in the Court's Case Management System	Email, Telephone, Court website	Court staff
Adobe Acrobat	Produce WGAC2.1 Complaint fillable PDFs to submit to the Court via E-File	Guides	IT and Court staff

The Court utilizes its *Court Website* to provide the public with access to general information regarding the Court, its programs and services, court forms, local rules, contact information, and other resources intended to assist court users.

The Court utilizes *Probate CMS* to manage and maintain designated content displayed on the Court's website, including public-facing information and messaging. Probate CMS also supports online requests for certified copies of case filings and facilitates the collection of associated fees.

The Court utilizes the *Public Access/Web Docket*, which is integrated with Probate CMS, to provide online access to docket information and case records maintained by the Court. The system allows the public to search and review case-related information in accordance with applicable laws, rules, and access restrictions.

Future Implementation Plan

Using the operational categories set forth above, the Court intends to acquire and/or implement the following technologies over the next 3-5 years.

A. Public Access

New Application	Purpose	How Users Receive Instructions	Department/ Role Responsible
ProbateAccess	Mobile App which provides select public records maintained by the Court, contact information, and links to the Court website.	Terms of use	IT staff
ABBYY Fine Reader	Application processes all public facing PDF documents to ensure ADA compliance up to standard WCAG2.1	Vendor training materials	IT staff

PUBLIC NOTICE

NOTICE OF PROPOSED LOCAL RULE 73.9

In accordance with Ohio Civ.R. 83(B), notice is hereby given of the proposed Local Rule 73.9 to the Local Rules of the Cuyahoga County Court of Common Pleas, Probate Division. The proposed rule is listed below and would be effective December 1, 2026.

Comments regarding the proposed rule can be forwarded in writing for consideration to Courtney Verardi, Staff Attorney for Judge Anthony J. Russo and Judge Laura J. Gallagher at the Probate Court, 1 W. Lakeside Avenue, Cleveland, Ohio 44113, on or before November 23, 2026.

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Rule 73.9 **Deposit for Court Costs**

Deposits shall be required upon the initial filing of any proceeding. The deposit may be applied toward costs as documents are filed in the proceeding, and the Court may require additional deposits as necessary. The Court shall maintain and make available on its website the current schedule of all Court costs.

(History: Effective 12-1-26)