PROBATE COURT OF CUYAHOGA COUNTY, OHIO

GUIDELINES – E-FILE TRUSTS

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Updated 4/23/25

General Guidelines and Documents

For Testamentary Trusts and related Estates (with Last Will and Testament)

After the decedent's Will has been admitted to probate, a Testamentary Trust Application (Form 25.0 with 25.1A) may be filed under a new Trust case number.

Please list the related estate case number on the line provided in the body of the Testamentary Trust Application. DO NOT list the estate case number on the Trust Application Case Number line.

For Wrongful Death, R.C. 2111, and Medicaid Payback/Special Needs Trusts

A Trust Application (form 25.0A with 25.1A) may be filed under a new Trust case number after a settlement order has been issued on an underlying case authorizing the establishment of the trust.

List the related estate or guardian case number on the line provided in the body of the Trust Application. DO NOT list these numbers on the Trust Application Case Number line.

Underlying and Related Cases

Whenever possible, please list known related Probate Court cases on the Application forms on lines provided. For other pleadings, please list the related case number under or near to the caption of the pleading. We also encourage you to use the E-File *Note for Clerk* field on the Gateway review screen to list related cases.

DO NOT list related cases on the Trust forms Case Number line. Leave this line blank for the Court to populate with the new Trust case number.

Only after all required documents have been filed will the Court proceed to review Applications to appoint a Trustee.

The Probate Court will index its database of cases for all new filings and may contact E-File users prior to acceptance if any search results may affect a particular submission or require clarification.

The Court may require additional waivers, hearings, and notice of hearing to interested parties after the Application is filed.

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

Forms for Trust Filings

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

Navigate to the website forms, here: *Forms>Trust Forms*
Web address: https://probate.cuyahogacounty.gov/trsforms.aspx.

Document Preparation and Signatures

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

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

1) As an ink signature, the signed document then converted to a scanned PDF copy, or

2) As an E-Signature, formatted by typing /S/ in front of the typed name on signature lines, or

3) As an electronically signed or captured signature using software with audit tracking capability (e.g., DocuSign, RightSignature, Adobe Sign).

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

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

Preparation and Submission of Waivers

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

1) As scanned PDF copies with original ink signatures, or

2) As electronically signed PDF copies, using signature capture software which includes audit tracking capability (e.g., DocuSign, RightSignature, Adobe Sign).

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

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

Information about Filing Original and Additional Bonds

The Probate Court may order a bond posted by Trustees prior to appointment. Additional bonds may be ordered any time after an original bond has been posted.

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

Additional notarized hard-copy bonds must be filed at Court within ten (10) days of the order. **BONDS CANNOT BE E-FILED**.

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

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

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

Information about Hearings

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

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

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

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.

E-Filing Steps for New Trusts Cases

Testamentary Trust Setup – with Copy of Will

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

Case Party Role on Web	Application Fields
Applicant	*Applicant*
Decedent, include all known AKAs	*Decedent, include all known AKAs*
Beneficiary *(one per each Trust case)*	*Party to benefit from Trust* *(as named in Trust declaration/agreement)*

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

   - ☐ **Upload the Application for Appoint of Testamentary Trustee (Form 25.0 with 25.1A)**
   - ☐ **Upload a copy of the Will admitted to probate using the 'Supplemental Document' code – your copy must match the Will admitted at Court**
   - ☐ **Upload the list of Trust Beneficiaries (Form 25.1)**
   - ☐ **Upload the list of Next of Kin of Minor Beneficiaries (Form 25.15) if necessary**

4. **FILING REVIEW:** Review your data and documents for accuracy. EDIT for corrections.

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

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

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

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Wrongful Death Trust Setup

1. **AFTER LOGIN: Select File a New Case from the blue E-Filing tab**
   Select TRUST
   Select WRONGFUL DEATH TRUST
   Case Title: type the full name of the Beneficiary
   *[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 *Wrongful Death Trusts:*

Case Party Role on Web	Application Fields (Form 25.0A)
Applicant	*Applicant*
Decedent, include all known AKAs	*Decedent, include all known AKAs*
Beneficiary *(one per each Trust case)*	*Party to benefit from Trust* *(as named in Trust declaration/agreement)*

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

   - ☐ **Upload the Application for Appointment of Trustee (Form 25.0A with 25.1A)**
   - ☐ **Upload the list of Trust Beneficiaries (Form 25.1)**
   - ☐ **Upload the list of Next of Kin of Minor Beneficiaries (Form 25.15) if necessary**
   - ☐ **Upload a copy of the proposed Trust Agreement/Declaration signed by Applicant with blank signature line for the Probate Judge using code 'Proposed Trust Agreement/Declaration of Trust, filed' code**

4. **FILING REVIEW:** Review your data and documents for accuracy. EDIT for corrections.

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

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

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

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

R.C. 2111.182 Trust Setup

1. **AFTER LOGIN:** **Select File a New Case from the blue E-Filing tab**
   Select TRUST
   Select 2111 TRUST
   Case Title: type the full name of the Beneficiary
   *[Click **Save and Proceed** to advance each screen]*

2. **ADD CASE PARTIES:**

   Party Role information must match the information on the *Application* and *Motion*.
   Enter all names complete without abbreviations or initials.
   Enter any Alias Names (AKAs) in the alias fields provided.

   The following roles are REQUIRED for *R.C. 2111.182 Trusts:*

Case Party Role on Web	Application Fields (Form 25.0A)
Applicant	*Applicant*
Beneficiary *(one per each Trust case)*	*Beneficiary* *(as named in Trust declaration/agreement)*

3. **ADD DOCUMENTS:**

   Fill-in forms MUST be typed complete and signed.

   - ☐ **Upload the Application for Appointment of Trustee (Form 25.0A with 25.1A)**
   - ☐ **Upload the list of Trust Beneficiaries (Form 25.1)**
   - ☐ **Upload the list of Next of Kin of Minor Beneficiaries (Form 25.15) if necessary**
   - ☐ **Upload a copy of the proposed Trust Agreement/Declaration signed by Applicant with blank signature line for the Probate Judge using code 'Proposed Trust Agreement/Declaration of Trust, filed' code**

4. **FILING REVIEW:** Review your data and documents for accuracy. EDIT for corrections.

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

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

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

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

Medicaid Payback/Special Needs Trust Setup

1. **AFTER LOGIN:** **Select File a New Case from the blue E-Filing tab**
   Select TRUST
   Select MEDICAID PAYBACK TRUST
   Case Title: type the full name of the Beneficiary
   *[Click **Save and Proceed** to advance each screen]*

2. **ADD CASE PARTIES:**

   Party Role information must match the information on the *Application* and *Motion*.
   Enter all names complete without abbreviations or initials.
   Enter any Alias Names (AKAs) in the alias fields provided.

   The following roles are REQUIRED for *Special Needs/Medicaid Payback Trusts:*

Case Party Role on Web	Application Fields (Form 25.0A)
Applicant	*Applicant*
Beneficiary *(one per each Trust case)*	*Beneficiary* *(as named in Trust declaration/agreement)*

3. **ADD DOCUMENTS:**

   Fill-in forms MUST be typed complete and signed.

   - ☐ **Upload the Application for Appointment of Trustee (Form 25.0A with 25.1A)**
   - ☐ **Upload the list of Trust Beneficiaries (Form 25.1)**
   - ☐ **Upload the list of Next of Kin of Minor Beneficiaries (Form 25.15) if necessary**
   - ☐ **Upload a copy of the proposed Trust Agreement/Declaration signed by Applicant with blank signature line for the Probate Judge using code 'Proposed Trust Agreement/Declaration of Trust, filed' code**

4. **FILING REVIEW:** Review your data and documents for accuracy. EDIT for corrections.

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

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

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

Print a copy of the Submission Confirmation for your records.

Keep originals of uploaded documents for review at hearings.

E-Filing on Existing Trust 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 Trustee	Click **CLAIM PARTY** next to your name
To **ADD** yourself as a new Applicant or Interested 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 Interested Party	Complete all fields; click **SAVE PARTY**
If your party is already represented and claimed *(Your name highlighted above party)*	Click **SAVE and PROCEED** to move directly to **ADD DOCUMENTS**
	Continued next page

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

> ***Tip***: In general, submit unrelated filings under separate confirmation numbers. (e.g., Do not send an Account with an Application to Expend Funds.)
>
> ***See pages 11-15 for instructions for specific types of pleadings.**

5. **FILING REVIEW:** Review your data and documents for accuracy. **EDIT** for corrections.

6. **PAYMENT**: **Add Credit or Debit Card billing information**:
   Select to file on behalf of the Trustee (most filings)
   Select to file on behalf of BENEFICIARY or OTHER (Objections, Exceptions)

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

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

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

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

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

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

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

Inventories, Accounts, and other Trust Documents

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

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

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

Trustee's Inventory (Form 25.4)

See also the Accounts and Inventories Topic page on the web for the Inventory checklists.

All assets should be listed with complete identifying details (account numbers, VINS, etc.).

- ☐ Upload the signed and completed inventory (Form 25.4) as one PDF file using code **TRUSTEE'S INVENTORY (FORM 25.4), FILED**.
- ☐ Upload supporting documents with exact values of the assets (e.g., Auditor valuations of property, Kelly Blue Book vehicle valuations) using code **INVENTORY – SUPPORTING DOCUMENTS, FILED**.

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

- ☐ Upload the **Confidential Disclosure of Personal Identifiers** (Form 45D) using the dedicated code in the document menu and send it in the same E-File confirmation submission with the Inventory.

SEND INVENTORY UPLOADS TOGETHER UNDER THE SAME CONFIRMATION SUBMISSION. DO NOT ADD OTHER MOTIONS OR APPLICATIONS TO THE INVENTORY SUBMISSION.

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Trustee's Partial Account (Forms 25.5 – 25.7 and related forms)

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

See also the Accounts and Inventories Topic page for the Account checklists.

SUBMIT ACCOUNT DOCUMENTS UNDER A SINGLE CONFIRMATION SUBMISSION.
DO NOT ADD OTHER MOTIONS OR APPLICATIONS TO THE ACCOUNT SUBMISSION.

Submit the following required documents for an Account to be **FILED** using available codes in the menu and instructions below:

- ☐ Upload the signed and completed Trustee's Account (Form 25.5 front and reverse).

  Choose Docket Code: **TRUSTEE'S PARTIAL ACCOUNT**.
- ☐ Upload Receipts and Disbursements (Form 25.6), Assets Remaining in Trustee's Hands (Form 25.7), and any spreadsheets or receipt/disbursement worksheets as one PDF file using code **ADDITIONAL PAGES OF ACCOUNTING (FORMS 25.6, 25.7, AND WORKSHEETS)**.

These supplemental documents are not mandatory for the Court to accept a Partial Account for filing but are required for the account to be **APPROVED**. You are strongly encouraged to include these documents with your account submission:

- ☐ Upload Vouchers or proof of disbursements and distributions to supplement the Receipts and Disbursements (Form 25.6) using code **VOUCHERS, FILED**.
- ☐ Upload the **Certificate of Service of Account** (Form 25.5C) using its code, if applicable.
- ☐ Upload a **Confidential Disclosure of Personal Identifiers** (Form 45D) with complete account or asset identifiers, if you have used any abbreviated identifiers on Forms 25.5, 25.6 and 25.7.
- ☐ Bank statements, HUD/Settlement Statements, Attorney or Trustee Computations, and receipts or proof of disbursements and distributions at the time of filing, using the code **ACCOUNT – SUPPORTING DOCUMENTS, FILED**.
- ☐ Upload in one PDF any signed **Waivers of Notice of Hearing and Consent to Account** (Form 25.5W) if applicable.

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Trustee's Final Account (Forms 25.5 – 25.7 and related forms)

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

See also the Accounts and Inventories Topic page for the Account checklists.

SUBMIT ACCOUNT DOCUMENTS UNDER A SINGLE CONFIRMATION SUBMISSION.
DO NOT ADD OTHER MOTIONS OR APPLICATIONS TO THE ACCOUNT SUBMISSION.

Submit the following required documents for an Account to be **FILED** using available codes in the menu and instructions below:

☐ Upload the signed and completed Trustee's Account (Form 25.5 front and reverse).

Choose Docket Code: **TRUSTEE'S FINAL ACCOUNT**.

☐ Upload Receipts and Disbursements (Form 25.6), Assets Remaining in Trustee's Hands (Form 25.7), and any spreadsheets or receipt/disbursement worksheets as one PDF file using code **ADDITIONAL PAGES OF ACCOUNTING (FORMS 25.6, 25.7, AND WORKSHEETS)**.

These supplemental documents are not mandatory for the Court to accept a Final Account for filing but are required for the account to be **APPROVED**. You are strongly encouraged to include these documents with your account submission:

☐ Upload Vouchers or proof of disbursements and distributions to supplement the Receipts and Disbursements (Form 25.6) using code **VOUCHERS, FILED**.

☐ Upload the **Certificate of Service of Account** (Form 25.5C) using its code, if applicable.

☐ Upload a **Confidential Disclosure of Personal Identifiers** (Form 45D) with complete account or asset identifiers, if you have used any abbreviated identifiers on Forms 25.5, 25.6 and 25.7.

☐ Bank statements, HUD/Settlement Statements, Attorney or Trustee Computations, and receipts or proof of disbursements and distributions at the time of filing, using the code **ACCOUNT – SUPPORTING DOCUMENTS, FILED**.

☐ Upload in one PDF any signed **Waivers of Notice of Hearing and Consent to Account** (Form 25.5W) if applicable.

☐ **Notice of Hearing on Account** (Form 25.5N) required with some Final Accounts for any interested parties who did not sign a Waiver of Notice of Hearing and Consent to Account (Form 13.7B). Upload copies of the Notice for each party and attach proof of delivery of notice with accompanying certified mail "green" cards or USPS online records showing proof of delivery, or other proof of receipt of notice as governed by Ohio Civil Rule 73 and Local Rule 64.2. Use the Account approval dates listed on our website to complete the Notice form.

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Documents Supporting an Account

For an Account already *filed and pending approval, or per a Magistrate's Order*

- ☐ Upload documentation or evidence of disbursements or distributions to supplement the Account's RECEIPTS and DISBURSEMENTS (Form 25.6) using code **ACCOUNT – SUPPORTING DOCUMENTS, FILED.**

  Note: Multiple PDFs may be attached under one submission to separate proof of receipts and disbursements.

Documents Supporting an Inventory

For an Inventory already *filed and pending approval, or per a Magistrate's Order*

- ☐ Upload documentation of asset values or appraisals of assets to supplement the Inventory and SCHEDULE of ASSETS (Form 25.4) using code **INVENTORY – SUPPORTING DOCUMENTS, FILED.**

  Note: Multiple PDFs may be attached and sent under one submission to separate proof of assets.

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Amended Pleadings – Motion Not Required

Petitions, Applications, and some required filings by the trustee that have been accepted for filing (appear on the Court's docket) may be set for hearing or pending decision. By Judge or Magistrate's request or order, these filings pending decision may be amended without motion by the filing party following instructions listed below. All amended petitions, applications, or other filings required amended by a Judge or Magistrate's order must be completed and signed as originals.

Trustee's Amended Inventory (Form 25.4 and related forms)

Motion Not Required – because the Inventory has not yet been approved/signed by the Judge

Include ALL the forms of the prior Inventory and proof of service of notice to interested parties, if applicable. The ONLY items that do not need to be re-submitted are valuations or legal descriptions unchanged by the amending of the inventory.

- ☐ Upload the signed amended Inventory, **Form 25.4** (front and reverse) using code: **AMENDED INVENTORY (FORM 25.4), FILED**.
- ☐ Upload any changed or new valuations or legal descriptions using code: **INVENTORY – SUPPORTING DOCUMENTS, FILED**.

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Trustee's Amended Accounts (Forms 25.5 – 25.7 and related forms)

Motion Not Required – because the Account has not yet been approved/signed by the Judge

Include ALL the forms and proof of service of the prior Account. The ONLY items that do not need to be re-submitted are receipts and/or other supporting documents that were unchanged by the amending of the account.

Amended Partial Account

- ☐ Upload the signed and completed Trustee's Account (Form 25.5 front and reverse).

  Choose Docket Code: **AMENDED PARTIAL ACCOUNT (FORM 25.5), FILED**.
- ☐ Upload Receipts and Disbursements (Form 25.6), Assets Remaining in Trustee's Hands (Form 25.7), and any spreadsheets or receipt/disbursement worksheets as one PDF file using code **ADDITIONAL PAGES OF ACCOUNTING (FORMS 25.6, 25.7, AND WORKSHEETS)**.

These supplemental documents are not mandatory for the Court to accept an Amended Partial Account for filing but are required for the account to be **APPROVED**. You are strongly encouraged to include these documents with your amended account submission:

- ☐ Upload Vouchers or proof of disbursements and distributions to supplement the Receipts and Disbursements (Form 25.6) using code **VOUCHERS, FILED**.
- ☐ Upload the **Certificate of Service of Account** (Form 25.5C) using its code, if applicable.
- ☐ Upload a **Confidential Disclosure of Personal Identifiers** (Form 45D) with complete account or asset identifiers, if you have used any abbreviated identifiers on Forms 25.5, 25.6 and 25.7.
- ☐ Bank statements, HUD/Settlement Statements, Attorney or Trustee Computations, and receipts or proof of disbursements and distributions at the time of filing, using the code **ACCOUNT – SUPPORTING DOCUMENTS, FILED**.
- ☐ Upload in one PDF any signed **Waivers of Notice of Hearing and Consent to Account** (Form 25.5W) if applicable.

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Amended Final Account

- ☐ Upload the signed and completed Trustee's Account (Form 25.5 front and reverse).

  Choose Docket Code: **AMENDED FINAL ACCOUNT (FORM 25.5), FILED.**
- ☐ Upload Receipts and Disbursements (Form 25.6), Assets Remaining in Trustee's Hands (Form 25.7), and any spreadsheets or receipt/disbursement worksheets as one PDF file using code **ADDITIONAL PAGES OF ACCOUNTING (FORMS 25.6, 25.7, AND WORKSHEETS)**.

These supplemental documents are not mandatory for the Court to accept an Amended Final Account for filing but are required for the account to be **APPROVED**. You are strongly encouraged to include these documents with your account submission:

- ☐ Upload Vouchers or proof of disbursements and distributions to supplement the Receipts and Disbursements (Form 25.6) using code **VOUCHERS, FILED**.
- ☐ Upload the **Certificate of Service of Account** (Form 25.5C) using its code, if applicable.
- ☐ Upload a **Confidential Disclosure of Personal Identifiers** (Form 45D) with complete account or asset identifiers, if you have used any abbreviated identifiers on Forms 25.5, 25.6 and 25.7.
- ☐ Bank statements, HUD/Settlement Statements, Attorney or Trustee Computations, and receipts or proof of disbursements and distributions at the time of filing, using the code **ACCOUNT – SUPPORTING DOCUMENTS, FILED**.
- ☐ Upload in one PDF any signed **Waivers of Notice of Hearing and Consent to Account** (Form 25.5W) if applicable.
- ☐ **Notice of Hearing on Account** (Form 25.5N) required with some Final Accounts for any interested parties who did not sign a Waiver of Notice of Hearing and Consent to Account (Form 13.7B). Upload copies of the Notice for each party and attach proof of delivery of notice with accompanying certified mail "green" cards or USPS online records showing proof of delivery, or other proof of receipt of notice as governed by Ohio Civil Rule 73 and Local Rule 64.2. Use the Account approval dates listed on our website to complete the Notice form.

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Amended Pleadings - Motion Required

Documents that have been accepted for filing (appear on the Court's docket) and approved by a Judge or that were part of any ruling by Magistrate or Judge may, in most instances, be corrected/amended by motion with supporting documents. Judges and Magistrates may also request or order such corrections. The motion must include the proposed amended document attached to the motion for review by a hearing officer. For all motions to correct/amend, the proposed amended document shall be a COPY of the document, completed and signed.

Motion to Correct Form 25.1 (Trust Beneficiaries) or Form 25.15 (Next of Kin of Proposed Minor Beneficiaries)

- ☐ Attach your motion with a Certificate of Service, and the signed proposed corrected form 25.1 or 25.15 behind your motion, in one PDF file. Use code: **Motion to Correct the Record** or **Motion, Filed** from the menu on the Add Documents screen.
- ☐ Upload the entry page PDF using code "Proposed Order Filed."

Motion to Amend/Correct Other Data or Non-Accounting Forms on the Existing Court Docket

- ☐ Attach your motion with a Certificate of Service, and the signed proposed corrected form 1.0 behind your motion, in one PDF file. Use code: **Motion to Correct the Record** or **Motion, Filed** from the menu on the Add Documents screen.
- ☐ Upload the entry page PDF using code "Proposed Order Filed."

Motion to Amend Trustee's Account or Inventory Form

This motion must be used to amend the Inventory and Appraisal (25.4 and related forms), or an Account (25.5 and related forms) if the pleading is ALREADY FILED AND APPROVED WITH A JUDGE'S SIGNATURE ON THE COURT'S DOCKET.

- ☐ Use the fill-ready Motion form from the Court's Trust forms including Certificate of Service, and attach a signed COPY of the proposed corrected account, inventory, or appointment of appraiser behind your motion in one PDF file using code **MOTION TO AMEND TRUSTEE'S ACCOUNT OR INVENTORY FORM, FILED**.

  The signed COPY of the proposed corrected item MUST include all the forms and pages of the filing as if it were submitted as the original. See the Accounts and Inventory Approval Checklists for a list of all documents necessary for approval of your inventory or account.

  Note: Do not upload a proposed order for this motion, the Court will provide the order.

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Application to Sell Personal Property (Form 9.0 – 9.2)

Note: Trustee's Inventory must be approved ***before*** Form 9.0 can be granted.

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

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

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

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

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

Application for Authority to Expend Funds from Trust

☐ Upload the Application (Form 15.7) with copies of invoices, receipts, or with additional explanation, documentation, or estimates as needed. Select the matching code from the menu.

☐ Upload the proposed order (Form 15.7JE) using the code 'Proposed Order.'

Optional: Upload a **Confidential Disclosure of Personal Identifiers** (Form 45D) as needed.

Verification of Receipt and Deposit (Form 22.3)

☐ Upload the signed Verification (Form 22.3 for minors) or (Form 22.3B for adults). Select the matching code from the menu.

Report of Newly Discovered Assets

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

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Motion to Extend Time to File Trustee's Documents

- ☐ Complete and sign the fill-ready Motion form from the Court's Trust forms, a Certificate of Service, and any supporting evidence in one PDF file using code **MOTION TO EXTEND TIME TO FILE TRUSTEE'S DOCUMENTS, FILED**.

  Note: Do not upload a proposed order for this motion, the Court will provide the order.

Motion for Continuance (of a scheduled hearing)

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

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

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

Motion for Reinstatement

- ☐ Complete and sign the fill-ready Motion form from the Court's Trust forms, a Certificate of Service, and attach a signed COPY of the proposed corrected or missing filing behind your motion in one PDF file using code **MOTION FOR REINSTATEMENT, FILED**.

  On the Gateway PAYMENT screen, file on behalf of the Removed Trustee.

  Note: Do not add a new party to the case to submit this reinstatement motion.
  Do not upload a proposed order for this motion, the Court will provide the order.

Other Motions and Pleadings

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

Proposed Orders and Agreed Judgment Entries

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

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Notice of Withdrawal of Pleading

- ☐ If a pleading filed with the Court has had no response filed by other interested parties, and is pending decision by a hearing officer (Magistrate or Judge), the filing party may withdraw his or her pleading by filing a Notice of Withdrawal of Pleading identifying the case number, the type of pleading (e.g., application, motion, request, etc.) and date it was filed. The notice will be reviewed by the Magistrate or Judge on the case and accepted or set for hearing if needed.

Waivers of Notice and Consent (if applicable)

- ☐ Upload any waivers and consents obtained after case creation separately, using code "Waivers and Consents" as many times as needed. Send all under the same confirmation number whenever possible.

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

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

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

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

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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 Trust Accounts and Inventories – (216) 443-8770.

To pay back costs owed on cases over the phone via credit or debit card, or for questions about case billing, contact the Clerk's Office – (216) 443-8896 and press '0' after the prompt.

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

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

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