

E-filing Guardianship Petition

Court of Common Pleas Orphans' Court Division

Dechert
LLP

Step 1: Go to <https://fjdefile.phila.gov> and log in with your credentials



The Philadelphia Courts
Electronic Filing System

Username:
Password:
Pin:

Announcement and Advisories

Effective Thursday, February 19, 2018, the Office of Judicial Records will no longer offer the payment option of "Walk-in and Pay Over the Counter." All electronic filings that require the payment of a filing fee must be paid with a credit or debit card through the Electronic Filing System.

Posted: January 29, 2018

The Civil, Criminal and Orphans' Court E-Filing System will be modified to accommodate the UJS Public Access Policy's requirements effective January 6, 2018. Please review the policy [HERE](#) to become familiar with its requirements.

An overview of the E-Filing System changes can be accessed [HERE](#).

Some important points to consider:

1. Documents containing CONFIDENTIAL INFORMATION defined by the policy must be redacted and both the REDACTED and UNREDACTED versions of the document must be filed.
2. The policy defines certain documents as CONFIDENTIAL DOCUMENTS. These documents must be filed/uploaded separately from all other documents.
3. There is no need to file a CONFIDENTIAL DOCUMENT FORM as required by the policy. The E-Filing system will generate the required form after questions are answered on the file upload screen.
4. For Civil and Orphans' Court users: the E-Filing System will have an area for filing/uploading documents permitted to be filed UNDER SEAL pursuant to a docketed court order. Court approval is mandatory in order to file documents UNDER SEAL.

Posted: January 3, 2018

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 agreed to comply with same.

Enter

Need Help?

[Forgot your password? Click](#)

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

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

[Criminal Electronic Filing Tutorial](#)
PowerPoint required

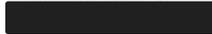
If you are not registered for an account with the Philadelphia Courts under the e-filing system, click this link and follow instructions to obtain a username.

Step 2: Click on Civil/Orphans' E-filing System.

Rectangular Snip



Welcome



Username: [Redacted]

[Update Information](#)

TODAYS DATE: January 31, 2018



- [Civil/Orphans' E-Filing System](#)
- [Criminal E-Filing System](#)
- [eSubpoena \(CP Civil\)](#)
- [eDiscovery \(Criminal\)](#)
- [Search Civil Dockets](#)
- [Search Orphans' Court Dockets](#)

[Log Off](#)



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Step 3: Start a "New Case."

January 31, 2018 01:35pm

Welcome!

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New Case

[Existing Case](#)

[Discovery Hearing](#)

[Motions](#)

[My Civil and Orphans' Court Cases](#)

[My Family Court Cases](#)

[Dockets](#)

[FJD Portal](#)

[eSubpoena \(CP Civil\)](#)

[CP Civil Help](#)

[Orphans' Help](#)

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Electronic Filing History

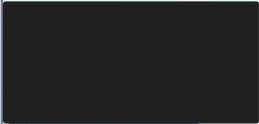
E-File #	Court	Type	Case ID	Status	Created	Ref. No.
	OC	SUBC		Filed, 01/30/18	01/29/18	
	OC	COMM		Filed, 12/07/17	12/07/17	
	OC	COMM		Filed, 12/07/17	12/07/17	
	OC	SUBC		Filed, 11/15/17	11/15/17	
	OC	COMM		Draft	11/13/17	
	OC	SUBC			11/13/17	
	OC	COMM		Filed, 11/02/17	09/19/17	
	CP	SUBC		Filed, 08/08/16	08/08/16	
	CP	SUBC		Draft	07/27/16	
	CP	SUBC		Filed, 07/27/16	07/27/16	
	CP	COMM			11/20/12	
	CP	SUBC		Draft	11/20/12	
	CP	SUBC		Draft	11/12/12	
	CP	SUBC			02/28/12	
	CP	SUBC			10/25/11	
	CP	SUBC		Draft	10/24/11	
	CP	SUBC			09/09/11	
	CP	SUBC		Filed, 08/03/11	08/03/11	
	CP	SUBC			07/19/11	
	CP	SUBC			07/19/11	

Displayed: 1 to 20 [Next](#)> [Last](#)>>

Step 4: Select Orphans' Court.

January 31, 2018 01:36pm

Welcome!



Where do you want to file this case?

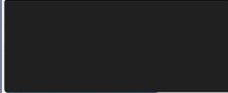
- Orphans' Court
- Trial Division - Civil

Continue >>

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-  [My Civil and Orphans' Court Cases](#)
-  [My Family Court Cases](#)
-  [Dockets](#)
-  [FJD Portal](#)
-  [eSubpoena \(CP Civil\)](#)
-  [CP Civil Help](#)
-  [Orphans' Help](#)
-  [Log Off](#)

Step 5: Fill out Estate Information with the last name, and first name of the AIP. Select "Type of Estate" requested, and enter petitioner/client's information under name of filing party. Select type of filing party, type of pleading filed, and answer whether or not an emergency. Click "continue".

Welcome!



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Court: OC

* Required Field.

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Estate Information

Last Name First Name Middle Suffix²

AIP Last Name AIP First Name

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

Name of Filing Party (Not Counsel for the Party)

Last Name First Name Middle Suffix²

Petitioner Last Name Petitioner FN

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

Petitioner Address --- Select from list ---

Select Filing Party Type

Is the Petition you are submitting an Emergency? Yes No

Pleading or Document Filed

²Suffix Name (Example: Jr, Sr, MD, III, PhD etc.)

Continue >>



Step 6: Complete forms as shown below for each interested party for the AIP. Interested parties to be served are any proposed co-Guardians, any adults who could be intestate heirs if the AIP died as of the time of filing, and any person or entity providing residential services to the AIP. When all interested parties have been added, click “continue”.

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Other Parties

*Last Name First Name Middle Suffix²
See training materials

*Entity Name, if applicable

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

*Party Type

*Street Address

*City

*State

Zip Code

² Suffix Name (Example: Jr, Sr, MD, III, PhD etc.)

-- Number of Other Parties entered: 0 --

Click “Add” after each interested party is entered.



Step 7: Fill out the form as shown below. The Clerk's Office has informed us that notice is not required – just accept this. The information in the gray box is the information of your AIP. The Social Security Number should be listed in your intake packet from the referral organization.

Welcome!

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Court: OC

***Is notice required?**
 No
 Yes. Copy of notice attached to pleading
 Date of Notice:
 Yes. All joinders are attached.

***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

* Required Field.
User Accepts/Agrees to [Rules/Agreement](#)



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

Information in this box is that of the AIP's



Step 8: The information on the bottom of page should pre-populate. Click “kindly enter my appearance”.

Under on behalf of, check your client's (the petitioner's) name.

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Court: OC

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)

AIP FIRST NAME AIP LAST NAME

PETITIONER FN PETITIONER LAST NAME (PETITIONER/RELATIVE)

SEE TRAINING MATERIALS (INTERESTED PARTY)

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

Name of Filing Attorney or Party	
Address	
Phone Number	
Fax Number	
Supreme Court Identification No.	
E-Mail Address	
<input type="button" value="Update Information"/>	

* Required Field.

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Step 9: Here, ensure that you have these two PDFs prior to moving onto the next step:

- PDF 1 – the Petition Package (in this order: preliminary decree, final decree, petition, verification, consent)
- PDF 2 – the IFP Affidavit

February 09, 2018 09:46am

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[Redacted]

* Required Field.

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File Attachment

*** NOTICE ***

Please review the [UJS Public Access Policy](#). In accordance with the policy, please follow the instructions and answer all questions carefully.

If your filing contains **CONFIDENTIAL INFORMATION** as defined in [Section 7.0 of the UJS Public Access Policy](#), you must upload a **Redacted Version** and an **Unredacted Version** of the filing in the **REDACTED DOCUMENTS FILE UPLOAD AREA** and the **UNREDACTED DOCUMENTS FILE UPLOAD AREA** respectively after answering the questions below.

If your filing includes **CONFIDENTIAL DOCUMENTS** or **EXHIBITS** as defined in [Section 8.0 of the UJS Public Access Policy](#), you must upload those documents separately from all other documents in the **CONFIDENTIAL DOCUMENTS/EXHIBITS FILE UPLOAD AREA** after answering the questions below.

If your filing or any portion of your filing, is being filed **UNDER SEAL** pursuant to a docketed court order, those documents must be uploaded in the **DOCUMENTS FILED UNDER SEAL FILE UPLOAD AREA** separately from all other documents.

Please respond accordingly below:

*Does your filing contain Confidential Information? Yes No

Note: If your filing contains Confidential Information, a **Redacted Version** and an **Un-Redacted Version** of your filing must be uploaded. Click [here](#) for a list of information considered confidential as defined by the UJS Public Access Policy.

*Does your filing contain Confidential Documents/Exhibits? Yes No

Note: Click [here](#) for a list of documents considered confidential as defined by the UJS Public Access Policy.

*Is any portion of your filing being filed **UNDER SEAL** pursuant to a court order? Yes No

Please note: None of the information in the Petition is “confidential” as defined in section 7.0 of the UJS Public Access Policy. Assuming we are dealing with adults, everything we are filing is non-confidential. Financial or medical documents are not filed along with the petition. Therefore, no redaction of the Petition. See next page for more guidance on this screen.

Step 10: Select “No” for the three questions asked below, and then click on “Upload Documents”. See training materials regarding issue of confidentiality.

Case ID: ZU_XXXX
Status: Draft
Started: 02/09/18
Court: OC

* Required Field.
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CONFIDENTIAL DOCUMENTS/EXHIBITS FILE UPLOAD AREA after answering the questions below.
If your filing or any portion of your filing, is being filed **UNDER SEAL** pursuant to a docketed court order, those documents must be uploaded in the **DOCUMENTS FILED UNDER SEAL FILE UPLOAD AREA** separately from all other documents.

Please respond accordingly below:

Does your filing contain Confidential Information? Yes No
Note: If your filing contains Confidential Information, a Redacted Version and an Un-Redacted Version of your filing must be uploaded. Click [here](#) for a list of information considered confidential as defined by the UJS Public Access Policy.

Does your filing contain Confidential Documents/Exhibits? Yes No
Note: Click [here](#) for a list of documents considered confidential as defined by the UJS Public Access Policy.

Is any portion of your filing being filed **UNDER SEAL** pursuant to a court order? Yes No

Click to open Upload Screen, ensure the block pop-up window option is not checked

Upload Documents

Documents Which are Not Confidential and Which Do Not Contain Confidential Information

File Name	Size
No uploaded document(s) found! It is required you upload to this section.	

Total Documents Uploaded: 0

Certification Regarding Compliance with UJS Public Access Policy:
I certify that the filing complies with the provisions of the *Public Access Policy of the Unified Judicial System of Pennsylvania Case Records of the Appellate and Trial Courts* that require filing confidential information and documents differently than non-confidential information and documents.

[Click here to certify compliance with the UJS Public Access Policy](#)

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Step 11: Select “Browse” or “Choose Documents”.

PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION FILE UPLOAD AREA

In this area, only upload all documents that are neither considered CONFIDENTIAL nor contain CONFIDENTIAL INFORMATION.

Please limit the maximum file size for each document to 50Mb
and do not use these characters in the file name * ? < > | # { } ~ : &

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

Browse...

Add file to the list:

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

Current File Attachments:

	File Name	Size

To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®

Click the **FINISH** button after all PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION files have been uploaded.

Finish Note: These documents will be viewable by the public.

Step 12: Select the first document you wish to upload (Petition Package), and then click “Open”.

The screenshot shows a web browser window with a yellow 'NOTICE' box. The notice text includes: 'UJS Public Access Policy. In accordance with the policy, please follow the instructions and answer all questions carefully.', 'CONFIDENTIAL INFORMATION as defined in Section 7.0 of the UJS Public Access Policy', 'CONFIDENTIAL DOCUMENTS or EXHIBITS as defined in Section 8.0 of the UJS Public Access Policy', and 'Is any portion of your filing being filed UNDER SEAL pursuant to a court order?'. Below the notice, there are radio buttons for 'Yes' and 'No'.

Overlaid on the web page is a Windows 'Open' dialog box. The path is 'This PC > Documents > Guardianship > Training'. The file list contains one entry: 'AIP Petition Package.pdf' (42 KB, Adobe Acrobat Document). The 'File name' field contains 'AIP Petition Package.pdf' and the file type is set to 'Adobe Acrobat Document'. A red arrow points to the 'Open' button.

At the bottom of the page, there is a button labeled 'Upload Documents' and a note: 'Click to open Upload Screen, ensure the block pop-up windows option is not checked.'

Step 13: After selecting the document you wish to upload, select “Add File Now”. Do not click “Finish” until all required documents are uploaded.

PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION FILE UPLOAD AREA

In this area, only upload all documents that are neither considered CONFIDENTIAL nor contain CONFIDENTIAL INFORMATION.

Please limit the maximum file size for each document to 50Mb
and do not use these characters in the file name * ? < > | # { } ~ : &

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

Browse...

Add file to the list:

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

Current File Attachments:

File Name	Size
-----------	------

To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®

Click the FINISH button after all PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION files have been uploaded.

Finish Note: These documents will be viewable by the public.

Step 14: After clicking “Add File Now,” you should see the name of the document uploaded under “File Name”. Now, select “Browse” or “Choose Document” to find, open, and upload additional documents (the IFP Affidavit). After adding all documents, check the boxes left of the file name that you would like to be added to the system and click “Finish”.

Step 15: Your screen should now look like the below after the documents are uploaded to the system.

Please review the [UJS Public Access Policy](#). In accordance with the policy, please follow the instructions and answer all questions carefully.

If your filing contains **CONFIDENTIAL INFORMATION** as defined in [Section 7.0 of the UJS Public Access Policy](#), you must upload a **Redacted Version** and an **Unredacted Version** of the filing in the **REDACTED DOCUMENTS FILE UPLOAD AREA** and the **UNREDACTED DOCUMENTS FILE UPLOAD AREA** respectively after answering the questions below.

If your filing includes **CONFIDENTIAL DOCUMENTS or EXHIBITS** as defined in [Section 8.0 of the UJS Public Access Policy](#), you must upload those documents separately from all other documents in the **CONFIDENTIAL DOCUMENTS/EXHIBITS FILE UPLOAD AREA** after answering the questions below.

If your filing or any portion of your filing, is being filed **UNDER SEAL** pursuant to a docketed court order, those documents must be uploaded in the **DOCUMENTS FILED UNDER SEAL FILE UPLOAD AREA** separately from all other documents.

Please respond accordingly below:

Does your filing contain Confidential Information? Yes No
Note: If your filing contains Confidential Information, a Redacted Version and an Un-Redacted Version of your filing must be uploaded. Click [here](#) for a list of information considered confidential as defined by the UJS Public Access Policy.

Does your filing contain Confidential Documents/Exhibits? Yes No
Note: Click [here](#) for a list of documents considered confidential as defined by the UJS Public Access Policy.

Is any portion of your filing being filed UNDER SEAL pursuant to a court order? Yes No

Click to open Upload Screen, ensure the block pop-up windows option is not checked

[Upload Documents](#)

 Documents Which are Not Confidential and Which Do Not Contain Confidential Information

File Name	Size
AIP Petition Package.pdf	42,201 bytes
IFP Affidavit.pdf	42,201 bytes

Step 16: Check off the box below, and click “Continue”.

Certification Regarding Compliance with UJS Public Access Policy:

I certify that the filing complies with the provisions of the *Public Access Policy of the Unified Judicial System of Pennsylvania Case Records of the Appellate and Trial Courts* that require filing confidential information and documents differently than non-confidential information and documents.

[Click here to certify compliance with the UJS Public Access Policy](#)

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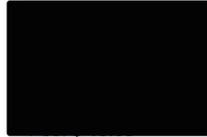
Step 17: Select the IFP option, and click “continue”.

February 09, 2018 09:51am

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Welcome!

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* Required Field.

User Accepts/Agrees to [Rules/Agreement](#).

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Total fee for this filing: \$ 15.00

- 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?
- In Forma Pauperis Pending or Previously Granted

2.3.5.5. *In Forma Pauperis (Subsequent Filings)* When *In Forma Pauperis* status has been previously granted for the entire case, you must attach a copy of the Decree granting the Status. Return to page 5 of the EFS and upload that Court Decree or Praecipe to Proceed In Forma Pauperis.

2.3.5.5.1. Where *In Forma Pauperis* status has been previously granted for a single filing, including but not limited to Annual Reports and Inventories, a new *In Forma Pauperis* Petition and/or Rule 240 Attorney Praecipe must be completed for the new filing.

- Court Ordered Waiver of Filing Fee

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Refresh this page

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

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Court: OC
Fee: \$ 0.00

* Required Field.

User Accepts/Agrees to [Rules/Agreement](#)

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SUMMARY

NAME OF ESTATE: AIP FIRST NAME AIP LAST NAME, AN ALLEGED INC PER	
TYPE OF ESTATE: ALLEGED INCAPACITATED PERSONS	
FILING PARTY'S RELATIONSHIP TO ESTATE: PETITIONER/RELATIVE	
PLEADING OR DOCUMENT FILED: PET FOR APPT OF PLENARY ESTPER	
NAME OF FILING PARTY (NOT COUNSEL FOR THE PARTY): PETITIONER FN PETITIONER LAST NAME	ADDRESS: PETITIONER ADDRESS XX
TO THE CLERK OF ORPHANS' COURT: Kindly enter my appearance on behalf of PETITIONER FN PETITIONER LAST NAME	
[REDACTED]	
OTHER PARTIES: 1. SEE TRAINING MATERIALS, INTERESTED PARTY ADDRESS, PHILADELPHIA PA 19104	

Court Use Only Information

DATE OF BIRTH: 01/01/1997	IS NOTICE REQUIRED? No
DATE OF DEATH: none entered	IF CITATION IS REQUESTED: WAS CITATION AGAINST RESPONDENT PREVIOUSLY ISSUED? No
REGISTER OF WILLS NO.: none entered	HAS ANOTHER PETITION BEEN DECIDED IN THIS CASE? No
DATE OF DEED OF TRUST: none entered	IS ANOTHER PETITION PENDING? No
SSN / EIN: 123456878	

Documents

AIP Petition_IFP Letter.pdf 79,111 bytes
AIP Petition.pdf 79,212 bytes

Payment Information

Counsel has filed a Praecipe to Proceed In Forma Pauperis. Filing Fees are hereby waived.
--

Step 18: Look over the final confirmation page to ensure all details are accurate; check acknowledgement at bottom and click "submit".

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

