

Franklin County Probate Court: Estates E-Filing Guide

For ALL decedent's estates, including testate and intestate, full administration, releases from administration, summary releases, real estate only

For ALL estate types

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PART 1: FRANKLIN COUNTY E-FILING - GENERAL GUIDELINES FOR ALL ESTATES

Franklin County e-Filing – General Guidelines

Judge Mackey has issued an administrative order regarding the technical requirements of e-filing, available on the Franklin County Probate Court (“FCPC”) website at: <https://probate.franklincountyohio.gov/PBCT-website/media/Documents/PDF/Administrative-Order-Regarding-E-Filing.pdf>. **This guide is intended only to serve as “helpful hints” for those unfamiliar with the FCPC e-Filing system.**

The FCPC e-filing system does not allow court staff to partially accept or reject a “package” of documents that are filed as a part of the same upload: each and every document must be acceptable for filing, or all will need to be rejected.

Accordingly, please be aware that every submitted pleading in a particular package must be able to be APPROVED FOR FILING. In some instances, the system may allow a filer to submit documents that are not be able to be approved in a particular case, or at a particular time. In such a situation, the clerks may reject back pleadings that are substantively able to be approved.

NOTE: THE COURT’S **ACCEPTANCE** OF A DOCUMENT FOR FILING
DOES NOT SIGNIFY **APPROVAL** OF THE SUBSTANCE OF THE DOCUMENT.

The FCPC strongly encourages filers to put down a deposit in case types that allow for one. The system will not prompt for a deposit; rather, a filer must manually add additional funds to the case. Instructions to do so are included in the “Court Costs” section hereafter.

Forms for all Estate Filings

GENERALLY: The Probate Court web pages list Ohio Supreme Court standard probate forms and additional documents accepted by the Franklin County Probate Court in the administration of estates. The standard probate forms are acceptable for filing so long as they are completed in accordance with the court’s standards; however, many have been modified to make them more readily acceptable for Franklin County e-filing.

- The modified forms, as well as supplemental forms specific to Franklin County that may be required by Local Rule and/or are preferred by the court, are available on the Court’s website at: <https://probate.franklincountyohio.gov/forms/>
- The major modification to most forms is the need for a proposed Entry to be filed separately from an Application. Accordingly, many pleadings that were previously on one page have now been divided into two separate pages. **Please note that every proposed Entry must have the words “Signature Page Attached” included above the Judge’s signature line.**
- **FORM 1.0:** The Probate Court provides a sample COMPLETED form 1.0, “Surviving Spouse, Children, Legatees and Devisees” as a resource for the acceptable preparation and submission of the form. A copy is included in this Filing Guide for convenience, and it is available on the Court’s website.

Document Signatures

Generally, signatures on forms and pleadings may be submitted in the following ways:

1. As an ink signature, with 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 **of an individual who has created a profile in the court's e-Filing system** (this is NOT acceptable for individuals who do not have their own unique profiles in the e-Filing system), or
3. As an electronically signed PDF copy, using software with audit tracking capability (e.g., DocuSign, RightSignature, Adobe Sign). Submit electronically signed forms and attach to each its audit track in the same PDF file, behind the form itself.

NOTE: Waivers may NOT be signed in the e-Signature format described in Option 2, above. Signed waivers for 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.

A further explanation of the court's signature standards is available on the website, at the following link:

<https://probate.franklincountyohio.gov/PBCT-website/media/Documents/PDF/Signature-Standards-FAQ.pdf>

Certified Copies

The following specific documents will be automatically certified upon the initial issuance by the court; and one certified copy will be mailed to the filer unless otherwise prearranged with the court:

- Letter of Authority
- Entry Relieving Estate from Administration
- Entry Transferring Title to Motor Vehicle
- Certificate of Transfer

If additional copies are needed, a filer should upload a Request for Certified Copies form together with the document of which the copies are requested.

A certified copy of a court filing may be requested at any time by filing a Request for Certified Copies form, a sample of which is included hereafter.

Court Costs; Adding Funds to a Deposit

When opening a new case, a filer will be charged for applicable court costs as the final step before proposed pleadings are submitted to the court. Cases for which the FCPC has historically accepted deposits will remain so; and flat-fee cases also remain unchanged. Information about court costs is available on the court's website at <https://probate.franklincountyohio.gov/about/the-court/court-costs>

Note that a Motion / proposed Entry to Release Information and an Application / proposed Entry for Release of Assets under \$200 have no associated filing fees, and remain free.

The court will not accept cash.

A charge of \$2 has been assessed in all case types to cover the cost of mailing.

Full estates / "deposit" cases:

A case may be opened with the minimum statutory amount (which for full estates is \$125).

While the e-filing system will prompt for the minimum statutory amount, the FCPC continues to recommend a deposit of \$250 to cover subsequent pleadings; any remaining balance will be refunded when the case closes.

An additional deposit may be added at any time by navigating to the "Document Type" drop-down and selecting "Additional Deposit." The system will prompt the user to enter an amount to be collected. There is no associated form or other paperwork.

Small estates / "flat fee" cases: Any flat-fee case will be charged one time, when the court accepts the initial case pleadings for filing and assigns a case number.

Bond

The Probate Court may order a fiduciary's bond be posted by Executors or Administrators prior to appointment. Additional bonds may be ordered any time after an original bond has been posted.

- Any bonds – original or adjusted – must be filed using Form 4.2 signed by both the proposed fiduciary and by the surety.
- A copy of the surety's power of attorney must accompany the Form 4.2.
- The Form 4.2 and surety's power of attorney should be uploaded using the document title "4.2B Copies of Bond Documents."

The bond will not become effective until approved by the court. To approve a bond, Form 4.2e – Proposed Entry Approving Fiduciary's Bond – must be uploaded for review and signature by the court. **If a hearing is required, the bond will not be approved prior to the hearing; accordingly, a Form 4.2e should not be uploaded in advance of hearing.**

Hearings

An Application to administer an estate, or to relieve an estate from administration, may require a hearing. If so, the filer/Applicant will 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).

- The filer/Applicant is responsible for ensuring that all required parties receive notice of the hearing in accordance with all applicable rules and laws.
- The filer/Applicant should upload all proof of service of notice in advance of a scheduled hearing for review by the hearing officer.

Hearings may be conducted remotely or in-person, as determined by the Judge or Magistrate assigned to the case, but will generally be held via Zoom.

- 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.

If you have a scheduling conflict for a particular hearing date, please email the court's legal staff at probate.legal@franklincountyohio.gov and/or upload an Application for Continuance of Hearing. The court will make every reasonable effort to accommodate a convenient date and time for all parties.

Hearings to appoint an Executor or Administrator

- If a hearing is required to appoint an Executor or Administrator, then **after the case has been opened**, counsel for the estate may schedule the hearing via the court's e-Hearing Locator, available at the court's

website at <https://probate.franklincountyohio.gov/about/e-hearing-locator>. **Fiduciary appointment hearings are currently available for e-scheduling on Wednesdays and Thursdays, in both the morning and afternoon.**

- After reserving a desired time, the filer/Applicant may upload a proposed Entry Setting Hearing reflecting the reserved time slot.
 - A hearing may not be approved unless it is scheduled in a time slot designated for **“FIDUCIARY APPTS.”**
 - A hearing is not officially scheduled until the court approves the proposed Entry Setting Hearing, and notice may not be properly provided before approval of the desired time slot.
- For these hearings, Applicants must send Notice and Citation of Hearing on Appointment of Fiduciary (Form 4.4) per O.R.C. 2113.06 and 2113.07, or file Waivers of Right to Administer (Form 4.3) from applicable parties. When any such form requires a court signature and issuance, **it is the responsibility of the Applicant to prepare a proposed document and upload to the court for consideration.**
 - The Court may require additional waivers, hearings, and notice of hearing to interested parties for Wills presented for probate and Applications to Administer.

Hearings for a Release from Administration

- After reserving a desired time, counsel for the Applicant may upload a proposed Entry Setting Hearing reflecting the reserved time slot.
 - A hearing may not be approved unless it is scheduled in a time slot designated for **“RELEASE FROM ADMIN.”**
 - A hearing is not officially scheduled until the court approves the proposed Entry Setting Hearing, and notice may not be properly provided before approval of the desired time slot.
- If a hearing is required to relieve an estate from administration, then **after the case has been opened**, counsel for the Applicant may schedule the hearing via the court’s e-Hearing Locator, available at the court’s website at <https://probate.franklincountyohio.gov/about/e-hearing-locator>. **Release hearings are currently available for e-scheduling on Tuesday mornings.**
 - For hearings to relieve an estate from administration, Applicants must send Notice of Application to Relieve Estate from Administration (Form 5.3), or file Waivers of Notice of Application to Relieve Estate from Administration (Form 5.2) from interested parties. When any such form requires a court signature and issuance, **it is the responsibility of the Applicant to prepare a proposed document and upload to the court for consideration.**
 - Applicants may be required to attend multiple hearings, submit additional documents, and file supplemental documents in accordance with law.

Case Association

Pro se filers (individuals representing themselves without an attorney) can request access to case filings through the e-filing system. Pro se filers must file a Notice of Case Association in order to receive e-notices and view nonconfidential filings through the online docket.

If you are a pro se filer seeking access to a case you did not open, please file a Notice of Case Association through the e-filing system. For questions, you may contact efiling-probate@franklincountyohio.gov.

PART 2: Submitting a Will to the Franklin County Probate Court

e-Filing a Will

When a case is opened with the intention of probating a Will – including a lost will – a copy of the Will that will be offered for probate must be uploaded with a **Notice of Presentation of Will** (a Franklin County Probate Court form available on the website; sample copy included hereafter).

E-file users must submit the original Will to Probate Court within fourteen (14) calendar days from the date the Application is accepted.

- **FOR FULL ESTATES:** The Court will review Applications to Administer the Estate (Form 4.0) and appoint an Executor or Administrator WWA **only** after the original Will is filed and admitted to probate, or upon hearing.
- **FOR SMALL ESTATES:** The Court will review Applications to Relieve Estate from Administration (Form 5.0) and/or and relieve the estate from administration **only** after the original Will is filed and admitted to probate, or upon hearing.
- E-filed Applications to Probate Will (Form 2.0) may be reviewed on the fourteenth day from the date the Application is accepted.

The original Will must be received by the fourteenth day or the Application may be dismissed. Alternatively, if a copy of an alleged Will is properly submitted together with the Notice of Presentation of Will at case initiation, the matter may be scheduled and treated as a “lost will” proceeding.

Submitting an Original Will

Submit an ORIGINAL Last Will and Testament **only** via one of the following methods:

1. Hand delivery
2. Certified U.S. mail
3. Commercial mail carrier that requires signature.

Please ensure that the court will receive the original Will within fourteen (14) days of the acceptance of your accepted Application to Probate Will. **DO NOT SUBMIT ORIGINAL WILLS VIA ORDINARY MAIL.**

Keep a copy of the Will and tracking number for your records.

Wills on Deposit with the Court

Each Applicant must review the Probate Court’s index of Wills on Deposit for all new filings, even those that the filer believes to be intestate. The Court will also review its index.

- When a Will located at the Court is found to match with a decedent, the Court will notify the Applicant.

- If a later-dated Will is located at the court, the Applicant may file a new Application to Probate Will (Form 2.0); or may withdraw the Application to Administer in order to allow the Executor named in the Will to petition to administer the decedent's estate.
- Generally, a Will may be filed for record (and not offered to probate) if no other action is being taken in that case or if the Applicant is seeking a Summary Release from Administration. A Will in any other estate case type will generally need to be offered for probate.

PART 3: PROCESS OVERVIEW

Clerks' Initial Review – Case Opening

In ALL estate case types, when the FCPC has received an uploaded package of forms intended to open a new estate, the clerks will first provide a threshold review to determine whether the minimum requirements have been satisfied for a case to be opened in Franklin County. The clerks' initial review is solely to determine whether a case should be opened.

The minimum requirements for to open a case differ based on case type.

Clerks' Substantive Review – Notice of Deficiency / Notice of Compliance

After the case has been opened: the clerks will provide a substantive review to confirm whether the pleadings are complete, correct on their face, and appear sufficient to support the appointment of a fiduciary.

Any time a new pleading is filed, the clerks will do their best to review the totality of new pleadings AND of the paperwork that has already been accepted for filing.

An example of the clerks' review checklists for each particular case type are included solely for filers' reference.

- If the relevant checklist has not yet been satisfied, the clerk will issue a Notice of Deficiency.
- If the checklist has been satisfied, then the clerk will instead issue a Notice of Compliance.

NOTICES OF DEFICIENCY - CLERK:

When the clerks believe that the paperwork is not yet completely in order (such that Letters of Authority cannot properly be issued), then the clerks will prepare a Clerk's Notice of Deficiency.

A Clerk's Notice of Deficiency is meant to summarize all of the outstanding deficiencies in paperwork that need to be addressed before Letters of Authority may be issued. Therefore, multiple Notices of Deficiency may be issued in a particular case. **Please reference the most recent Notice of Deficiency to note all current outstanding issues.**

When all apparent issues have been addressed by the pleadings (and/or the matter is set for a notice hearing, if necessary), then the clerks will issue a Notice of Compliance.

NOTICES OF COMPLIANCE:

The FCPC has two different – and equally important – form Notices of Compliance designed to keep the filer apprised of the status of the court's internal review.

1. **A Notice of Compliance - CLERK** signifies that the minimum paperwork to appoint a fiduciary has been accepted for filing.

2. **A Legal Notice of Compliance - LEGAL** is issued by the legal staff and will direct filers to upload one or more proposed Entries.

A **Notice of Compliance – Clerk** will alert the filer that the case appears to have met the minimum clerical requirements and has therefore been submitted to the FCPC legal team for a substantive review.

- In intestate estates, the legal team will review all documents that have then been filed.
- In testate estates, the Clerk's Notice of Compliance will also serve to notify the legal team to check the court's records to determine if an original Will has been submitted and/or is on deposit with the court.
 - Whether or not fourteen days have passed since the case was opened, the legal staff will check the records that are available as of the date that the Clerk's Notice of Compliance is issued.
 - If no Will has yet been received and fourteen days have not yet passed since the case was opened, the legal staff will check the records again when the time frame has run.

An **Entry Setting Hearing** or **Magistrate's Order** will issue if one or more matters of legal substance must be addressed before the case can move forward.

A **Notice of Compliance – Legal** will alert the filer to upload one or more proposed Entries.

Filers may be asked to hold any proposed Entries until after a Notice of Compliance – Legal has issued in order to streamline the estate administration process.

PART 4: E-FILING STEPS TO OPEN A CASE

Creating an e-Filing Account

Each user must have their own unique e-filing account to submit filings to the FCPC. Note that a paralegal may not file “on behalf of” an attorney: each attorney must utilize their own account.

To create an account, navigate to <https://efile.franklincountyoh.tyberacloud.net/> and select “Request Account.”



Franklin County
eFiling

Electronic Filing
powered by eFile from tybera

Welcome to eFiling

Please Log In

Username
mkbeaver

Password

Notice
☐ I have read and agree to the Notice of Redaction Responsibility.

[Log In](#)

[Forgot Your Password?](#)

[Forgot Your User Name?](#)

New Users
If you have not signed in before, please request a user account.

[Request Account](#)

We encourage you to stay informed about our eFiling updates and explore the new interface. For the latest information, [visit our resources page](#).

Selecting a Role

When creating an account in the e-filing system, it is important for individuals representing themselves (without an attorney) to correctly identify themselves as **pro se filers**. Selecting the correct filer role ensures you have access to the appropriate filing options and system features.

[User Agreement](#) ⇒ Select User Role

USER ROLES

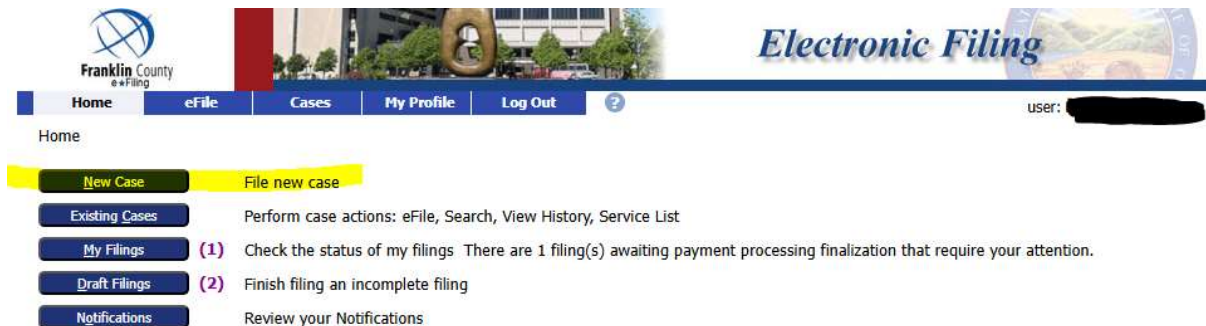
Select your user role:

- ☐ Agency / Facility
- ☐ Agency / Facility ADMINISTRATION
- ☐ Attorney
- ☐ Attorney-CSEA
- ☐ Court Reporter External
- ☐ Financial Institution
- ☐ Forensic
- ☐ Government Agency
- ☐ Media
- ☐ Parenting Coordinator/Custody Evaluator
- ☐ Pro Hac Vice
- ☒ Pro Se
- ☐ Probate ADAMH Bd Review
- ☐ Probate Doctor
- ☐ Probate Paralegal Proxy
- ☐ Probate Prescreener
- ☐ Process Server
- ☐ Proxy Filer

[Cancel](#) [Next](#)

Opening a Case

After logging in, a filer may request to open a new case by clicking the “New Case” button.



The filer will next be prompted to select the FCPC from the list of available courts:



Selecting the Case Type and Sub-Type

Selecting a Case Type:

When opening a new case, a filer will need to choose a case type from a list of drop downs. It is very important for a filer to select the correct case type and sub-type when initiating a new case. Please complete review all case type options in advance. **If you are unsure of the most appropriate case type or sub-type, please contact the court for assistance.**

A list of available case types is shown below:

Case Type

Description
Adoption
Civil
Estates
Guardianship Adult
Guardianship Minor
Mental Health
Miscellaneous
Name Change
Name Conformity - Adult
Name Conformity - Minor
Restricted Cases
Trust

For estates, the available sub-types are as follows:

- Ancillary Administration
- Beneficiary Placeholder¹
- Disclaimer
- Foreign Record
- Full Administration w/ Alleged Will
- Full Administration with Will
- Full Administration Without Will
- Inventory Safe Deposit Box
- Miscellaneous - Estate
- No Administration Will FRO²
- No Administration with Will
- No Administration Without Will
- Probate Only³
- Real Estate Transfer Only³
- Release Decedent's Medical Records
- Right of Action
- Right of Action with Will
- Summary Administration w/ Will
- Summary Administration w/ Will FRO²
- Summary Administration w/o Will
- Will Filed for Record Only
- Wrongful Death Only
- Wrongful Death Only with Will
- Wrongful Death w/ Will - Probate Assets
- Wrongful Death with Probate Assets

Home	eFile	Cases	My Profile	Log Out	?
Home ⇒ New Case Filing: Court ⇒ New Case Filing: Case Type ⇒ Case Sub Types					
Case Sub Types					
Description					
Ancillary Administration					
Beneficiary Placeholder					
Disclaimer					
Foreign Record					
Full Administration W/ Alleged Will					
Full Administration With Will					
Full Administration Without Will					
Inventory Safe Deposit Box					
Miscellaneous - Estate					
No Administration Will FRO					
No Administration With Will					
No Administration Without Will					
Probate Only					
Real Estate Transfer Only					
Release Decedent's Medical Records					
Right of Action					
Right of Action With Will					
Summary Administration W/ Will					
Summary Administration W/ Will FRO					
Summary Administration W/O Will					
Will Filed For Record Only					
Wrongful Death Only					
Wrongful Death Only With Will					
Wrongful Death W/ Will - Probate Assets					
Wrongful Death With Probate Assets					

¹ A 'placeholder case' to allow a potential wrongful death beneficiary to file notice of their claim in accordance with R.C. 2125.02(A)(3)(b) if no estate case for the decedent has been opened yet.

² Will "For Record Only."

³ A transfer of real estate only with a will should be opened as "Probate Only," rather than "Real Estate Transfer Only."

Case Initiation

Adding Case Participants:

For each estate case type, the first screen will prompt a filer to add Case Participants.

The screenshot shows the Franklin County eFiling interface. The top navigation bar includes links for Home, eFile, Cases, My Profile, and Log Out. The breadcrumb trail reads: Home » New Case Filing: Court » New Case Filing: Case Type » Case Sub Types » Case Initiation. The main heading is "Case Initiation: Full Administration With Will". Below this, there are radio buttons for "Surviving Spouse: Yes" and "No", with "No" selected. There are two buttons: "Add My Parties" and "Add Other Parties", with a note "(Any party to be served must be added as a distinct party.)". Below these is a table with columns: Remove, Participant Name, Type, and Attorney/Agent. At the bottom are buttons for "Back", "Save to Draft", and "Next".

Select **ADD MY PARTIES** to enter contact information for the Applicant.

Select **ADD OTHER PARTIES** to enter information for the Decedent, and for a surviving spouse (if any). Ensure that the information entered for the Decedent matches the death certificate.

Adding Proposed Pleadings:

Next, the system will prompt a filer to upload documents to the court. Some, but not all, required pleadings are designated with an asterisk (*). The court will reject a request to open a case unless all of the required forms are submitted.


From DOCUMENT LOCATION, the filer will need to navigate to where the document is saved on their computer; select the file; add the Page Count, and then click ADD to Add to Submission.

The screenshot shows the Franklin County eFiling interface for adding a document. The top navigation bar is the same as the previous screen. The breadcrumb trail reads: Home » New Case Filing: Court » New Case Filing: Case Type » Case Sub Types » Case Initiation » Add a Document. The main heading is "Case Sub Types : No Administration With Will". Below this, there is a "Document Category" dropdown menu. The "Document Type *" dropdown menu is set to "Application to Probate Will *". There is an "Additional Text" text box. The "Page Count" is a text box. Below this is a note: "Acceptable File Format Type(s) (*.doc,*.docx,*.pdf)". The "Document Location" section has a "Choose File" button and the text "No file chosen". At the bottom left is an "Add to Submission" button with an "Add" label. Below this is a table with columns: Document Name, View Document, Edit Data, and Size. The table has one row: "Case Data", "View Document", "Edit Data" (with a checkmark icon), and "0.01 MB". Below the table, it says "Total Size: 0.0 MB". At the bottom are buttons for "Back", "Move to Draft", and "Next".

Note that documents are not added until they appear in the blue box under DOCUMENT NAME.

Review and Submit Filings:

The next screen will show any deficiencies in case information (in red below). The filer needs to select to "PAY BY CREDIT CARD;" confirm the list of documents that are intended to be submitted; and submit the filing to the court.



HomeeFileCasesMy ProfileLog Out?

Home ⇒ New Case Filing: Court ⇒ New Case Filing: Case Type ⇒ Case Sub Types ⇒ Case Initiation ⇒ Add a Document ⇒ Review and Submit Filing

Review and Submit Filing

Case Sub Types : No Administration With Will

Client #

Error: DATE OF DEATH IS REQUIRED FOR DECEDENT

Estimated Fees: \$40.00

☒ Pay by Credit Card

☐ Special Waiver

☐ Government Agency

Generated Case Data:

Document(s) to be Submitted:

Document Name	View Document
Application to Probate Will	1 TEST Page.pdf
Application to Relieve Estate From Administration	1 TEST Page.pdf
Notice of Presentation of Will	1 TEST Page.pdf
Surviving Spouse, Next of Kin, Legatee-Devisee	1 TEST Page.pdf

Special Filing Instructions for the Clerk:

PART 5: FULL ESTATES- APPOINTING A FIDUCIARY

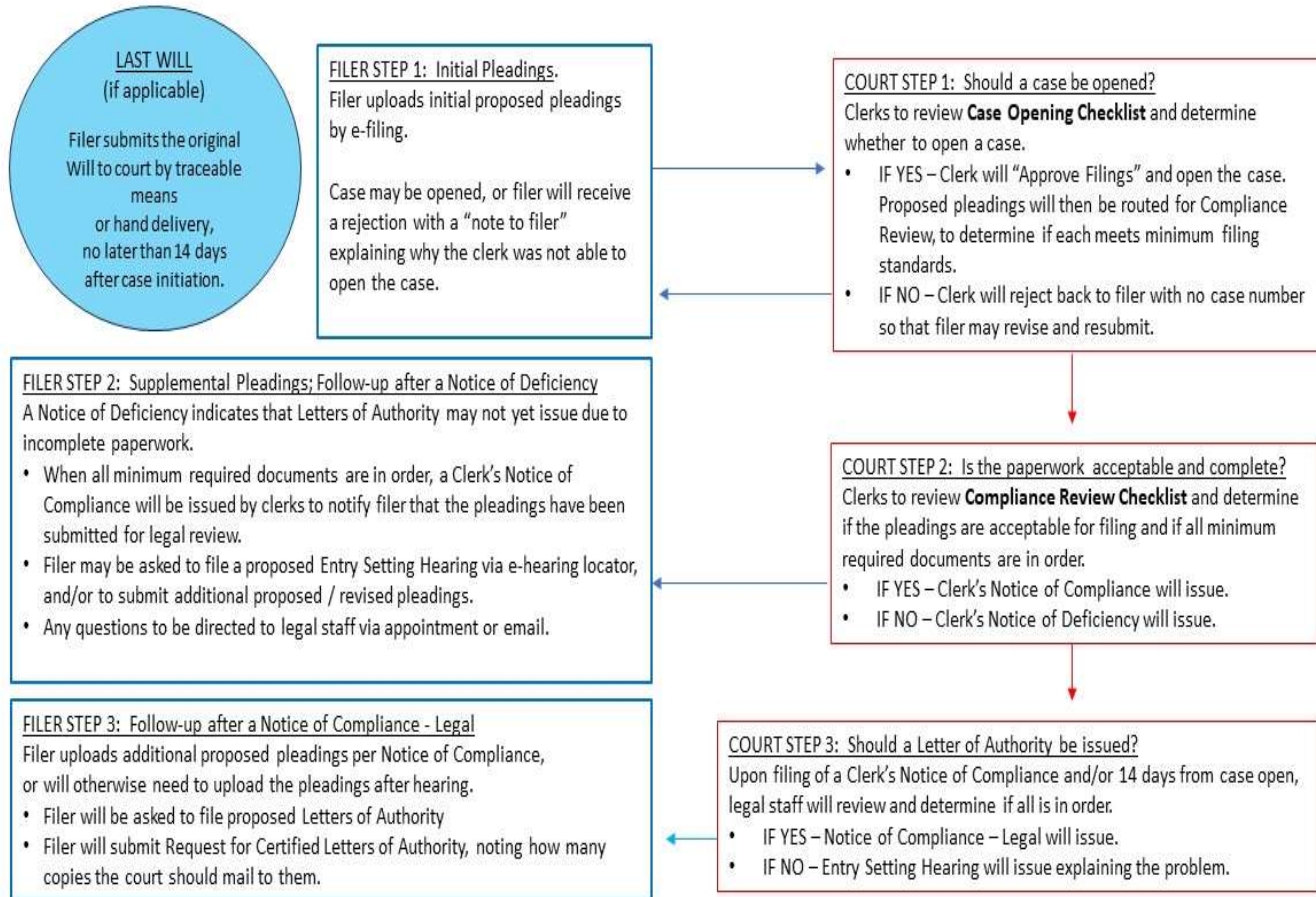
Overview: Full Estate - Fiduciary Appointment Procedures

TO APPOINT A FIDUCIARY OF A NEW LARGE/FULL ESTATE:

1. An Application for Authority to Administer Estate is e-filed. The following documents are required before a case number will be assigned (otherwise, the complete package will be rejected back to the filer):
 - Form 4.0 – Application for Authority to Administer Estate
 - Form 4.0A – Fiduciary’s Acceptance (Franklin County form)
 - Form 1.0 – Next of Kin
 - Proof of death – death certificate or Notice of Opening Estate Without Death Certificate
 - Notice of Presentation of Will and Form 2.0, Application to Probate Will – if relevant
2. A clerk will review the initial pleadings for completeness. Upon review, the clerk will issue one of the following:
 - a NOTICE OF DEFICIENCY outlining what paperwork remains outstanding before Letters of Authority may be issued; or
 - a NOTICE OF COMPLIANCE, indicating that the paperwork is being finally reviewed by legal staff.
3. Legal staff will ensure that an appointment is proper and may require a hearing or the presentation of additional information. Legal staff will issue one of the following:
 - an Order/Entry detailing additional information or requiring a hearing; or
 - a NOTICE OF COMPLIANCE, confirming that a Letter of Authority may be issued without hearing, and requesting any other proposed form Entries that are then appropriate.
4. The filer is responsible for uploading the following:
 - a proposed Letter of Authority;
 - any other proposed Entries listed in the NOTICE OF COMPLIANCE; and
 - a Request for Certified Copies form requesting certified copies of the Letter of Authority.

Flowchart: Full Estate - Fiduciary Appointment Procedures

APPOINTING AN ESTATE FIDUCIARY IN FRANKLIN COUNTY E-FILING



PART 6: RELIEVING AN ESTATE FROM ADMINISTRATION (SMALL ESTATES)

1. An Application for Summary Release from Administration or an Application to Relieve Estate from Administration is e-filed. **The following documents are required before a case number will be assigned** (otherwise, the complete package will be rejected back to the filer):

SUMMARY RELEASE

- Form 5.10a – Application for Summary Release from Administration
- Form 1.0 – Next of Kin
- Proof of death – death certificate or Notice of Opening Estate Without Death Certificate
- Copy of the Applicant’s photo ID

FULL RELEASE

- Form 5.0 – Application to Relieve Estate from Administration
 - Form 1.0 – Next of Kin
 - Form 5.0F – Release from Administration Statement of Knowledge
 - Proof of death – death certificate or Notice of Opening Estate Without Death Certificate
 - Copy of the Applicant’s photo ID
2. A clerk will review the initial pleadings for completeness. Upon review, the clerk will issue one of the following:
 - a NOTICE OF DEFICIENCY outlining what paperwork remains outstanding, an Entry Relieving Estate from Administration may be issued; or
 - a NOTICE OF COMPLIANCE, indicating that the paperwork is being finally reviewed by legal staff.
 3. Legal staff will ensure that an Entry Granting Summary Release from Administration or an Entry Relieving Estate from Administration is proper, and may require a hearing or the presentation of additional information. Legal staff will issue one of the following:
 - an Order/Entry detailing additional information or requiring a hearing; or
 - a NOTICE OF COMPLIANCE, confirming that an Entry Relieving Estate from Administration may be issued without hearing, and requesting any other proposed form Entries that are then appropriate.
 4. The filer is responsible for uploading the following:
 - a proposed Entry Granting Summary Release from Administration (form 5.11) or a proposed Entry Relieving Estate from Administration (form 5.6A), as applicable;
 - a proposed 9.0C, Application to Transfer Title to Motor Vehicle (if applicable); and
 - any other proposed Entries listed in the NOTICE OF COMPLIANCE.

APPENDIX A: New forms- Examples

Notice of Presentation of Will

PC-E-2.0P (Rev. 4-2025)

PROBATE COURT OF FRANKLIN COUNTY, OHIO JEFFREY D. MACKEY, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF PRESENTATION OF WILL

Now comes the undersigned and states that an ☐ Application to Probate Will ☐ Application to File Will for Record Only ☐ Application to Admit Lost Will to Probate is being filed with this form.

[Check all that apply]

☐ The following unaltered document(s) shall be presented to the court for filing within fourteen days of the filing of this Notice. **Copies of these documents are attached to this notice.**

- ☐ Original last will and testament dated _____ and consisting of _____ pages.
- ☐ One or more original codicils dated _____ and consisting of _____ pages.
- ☐ One or more prior original wills dated _____ and consisting of _____ pages.
(attach additional pages if necessary)

☐ The decedent's last will and testament is believed to be on deposit with the court for safekeeping pursuant to R.C. 2107.07. I hereby request that the court file the deposited will in this case.

☐ I believe the decedent's last will to be lost and will be initiating proceedings under R.C. 2107.26-28.

By signing this notice, I acknowledge that I understand the following:

- The court will review its index of deposited wills pursuant to R.C. 2107.08 upon the opening of this estate, which could result in the filing of a prior will or a will more recent than any I submit.
- If no original last will is on deposit with the court and none is submitted within fourteen days of this notice, this matter may be closed administratively for want of prosecution.
- If the court believes the decedent's purported last will to be a copy or a nonconforming will pursuant to R.C. 2107.24, this matter shall be set for hearing.

Attorney's Signature _____
Typed or Printed Name _____
Street Address _____
City, State, Zip Code _____
Telephone Number (include area code) _____
Email Address _____
Attorney Registration No. _____

Applicant's Signature _____
Typed or Printed Name _____
Street Address _____
City, State, Zip Code _____
Telephone Number (include area code) _____
Email Address _____

FRANKLIN COUNTY FORM PC-E-2.0P – NOTICE OF PRESENTATION OF WILL

PROBATE COURT OF FRANKLIN COUNTY, OHIO

JEFFREY D. MACKEY, JUDGE

ESTATE OF JOHN DOE [date of death for purposes of this sample: 12/1/2021], DECEASED
CASE NO. XXXXXX

**SURVIVING SPOUSE, CHILDREN, NEXT OF KIN,
LEGATEES AND DEVISEES**

[R.C. 2105.06, 2106.13 and 2107.19]

[Use with those applications or filings requiring some or all of the
information in this form, for notice or other purposes. Update as required.]

The following are decedent's known surviving spouse, children, and the lineal descendants of deceased children. If none, the following are decedent's next of kin who are or would be entitled to inherit under the statutes of descent and distribution.

Name	Residence Address	Relationship to Decedent	Birthdate of Minor
N/A		Surviving Spouse	
Adam A. Doe	123 High Ave., Apt. 202 Columbus, OH 43215	+ Son	
Barbara B. Doe o/o Adam A. Doe, Executor	+ 123 High Ave., Apt. 202 Columbus, OH 43215	+ Daughter (d.o.d. 3/31/23)	See Case No. YYYYYY
Charlotte C. Public		Daughter (d.o.d. 7/15/15)	
Edward E. Public	456 Main Blvd. Columbus, OH 43204	+ Grandson	
Franklin F. Public	N/A	Grandson (d.o.d. 2/15/23)	Deceased. No estate opened yet.
George G. Public		Grandson (d.o.d. /10/21)	
Ian I. Public o/o Jane Q. Public, mother	+ 867 Some Ln. Blacklick, OH 43004	+ Great-grandson	5/1/2017
David D. Doe		Son (d.o.d. 10/10/10)	
Halley H. Doe	5309 Another St. Canal Winchester, OH 43110	+ Granddaughter	

[Check whichever of the following is applicable]

- ☐ The surviving spouse is the natural or adoptive parent of all of decedent's children.
- ☐ The surviving spouse is the natural or adoptive parent of at least one, but not all, of decedent's children.
- ☐ The surviving spouse is not the natural or adoptive parent of any of decedent's children.
- ☐ There are minor children of the decedent who are not the children of the surviving spouse.
- ☐ There are minor children of the decedent and no surviving spouse.

CASE NO. XXXXXX

The following are the vested beneficiaries named in the decedent's will:

Name	Residence Address	Birthdate of Minor
Halley H. Doe, Trustee of the James Doe Living Trust	5309 Another St. Canal Winchester, OH 43110	
Barbara B. Doe c/o Adam A. Doe, Executor	123 High Ave., Apt. 202 Columbus, OH 43215	See Case No. YYYYYY
Edward E. Public	456 Main Blvd. Columbus, OH 43204	
Franklin F. Public	N/A	Deceased. No estate opened yet.
Ian I. Public c/o Jane Q. Public, mother	867 Some Ln. Blacklick, OH 43004	5/1/2017
Halley H. Doe	5309 Another St. Canal Winchester, OH 43110	
Friendly Local Place of Worship c/o A. Religious Leader	867 Whiteacre Ave. Worthington, OH 43085	
Friendly Local Animal Rescue c/o A. Treasurer	5309 Greenacre Ave. Delaware, OH 43015	
The Friendly Local University Foundation c/o A. Statutory Agent	111 Blackacre Ave. State College, PA 16801	

[Check whichever of the following is applicable]

☒ The will contains a charitable trust or a bequest or devise to a charitable trust, subject to R.C. 109.23 to 109.41.

☐ The will is not subject to R.C. 109.23 to 109.41 relating to charitable trusts.

Date

Applicant (or give other title)

Reset Form

FREQUENTLY ASKED QUESTIONS

1. I'm having technical issues. What do I do?

- Please email efiling-probate@franklincountyohio.gov to reach the court's technology staff.

2. Why were my filings rejected?

- In your electronic notification of rejected pleadings, there is a box that should contain a brief explanation from court staff.
 - The court can only accept or reject an entire package of pleadings, and you may have simply included pleadings that are not yet timely, or that the docket cannot accept when filed together.
 - You may have insufficient funds on deposit. Please check the court's docket at <https://probate.franklincountyohio.gov/record-search/general-case-index> to confirm that funds are available.
 - Any proposed Entry must have "Signature Page Attached" inserted on the judicial officer's signature line. The court can only update documents that are uploaded in Word; otherwise they must be rejected.

3. How do I increase my deposit?

- When filing, navigate to the "Document Type" drop-down and select "Additional Deposit." The next screen will prompt for an "Amount to be Collected". No paperwork needs to be attached/uploaded.

4. How do I reopen a case?

- First, file a Form 1.0P so that the court can reactivate the case number. THIS IS AN INTERNAL PROCESS, EXCLUSIVELY TO ALLOW FOR THE E-FILING OF THE SUBSTANTIVE PLEADINGS THAT ARE NEEDED TO REOPEN THE CASE.
- After you receive a notification that that pleading has been approved, separately upload the substantive pleadings.