

E-Filing Tips

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Probate Court Administrator



It seems a little hard to believe, but the Oakland County Probate Court e-filing pilot passed its first anniversary on November 1, 2012. I thought it would be helpful to go over some of the finer points and tips of the program, as well as a few general reminders.

OAKLAND COUNTY CIRCUIT COURT OMBUDSMAN PROGRAM

Do you have a concern regarding an active matter before the court?

Joel Serlin, Oakland County Circuit Court Ombudsman, may be able to help.

The purpose of the program is to provide a discreet forum for the informal resolution of issues and matters in which there is no other established or preferred procedure to secure redress.

The Ombudsman is a neutral, vested with the authority to act as an intermediary between attorneys and judicial officers and other personnel.

Hallmarks of the program

Confidentiality | **Neutrality** | **Informality** | **Independence**

**Contact Ombudsman Joel Serlin
at (248) 353-7620**

For additional details about the ombudsman program visit the "Member News" section of the OCBA's website at www.ocba.org, or scan the QR code with your smartphone



1. All cases are currently initiated (or "opened") through standard hard copy filings. Whether your case will be an e-file case is determined at the time of filing when the judge is drawn. If your case is designated as an e-file case, you will be given a "Notice of Mandatory E-filing." This document needs to be served on all interested parties along with the initiating petition/complaint.

2. Make sure to review your documents before you submit them. If you scanned a document, be sure it is completely legible and the orientation is correct. It should be scanned at 8½ x 11 scale size. Documents that do not meet these criteria must be rejected. We recommend that you do not submit your documents in color. Please scan your documents in grayscale and at 200 DPI.

3. You must file a Proof of Service. This applies even if all parties were served through the e-file system. A Proof of Service document must still go into the legal file.

4. The court always needs the original of any will being submitted for probate (aside from a petition to admit a copy, of course). If you are submitting a will on a matter where the initiating petition has already been filed, a copy of the will you are seeking to have admitted must be e-filed as an attachment to your petition regarding the will. The original of the will you are seeking to admit should then be submitted to the court in person or by mail within 14 days. Please include a copy of the petition so the will quickly goes where it needs to be.

5. Be sure to update your contact information on the Odyssey system as soon as possible if there are any changes, especially to your email address. This is the address where service will be accomplished through the e-file system, so you want to ensure it is accurate at all times.

6. All motions and petitions require a proposed order to be filed as a separate document. Some things to remember about proposed orders:

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The order should be completely filled out or drafted with the requested relief included. Do not submit a blank order.

When submitting a document through the e-file system, a "Document Description" is required. For a proposed order, the description should be entered as follows: the abbreviation "HRG," the date of the hearing, the words "Proposed Order," and then a reference to the petition or motion name. Example: HRG 1/2/13 Proposed Order Re: Sale of Real Estate. Proposed orders that do not have this information will be rejected.

Be aware that if you wish to serve a proposed order on a party prior to a hearing you will need to serve it separately from your e-file submission to the court. Your proposed order for a hearing will be held in the e-file system in a review status until the hearing. It will not be served on parties unless it is eventually signed by the judge (and only if you requested the "e-file and serve" option).

7. Please be sure to review the "e-filing order information sheet" on the court's website for detailed information on orders to submit in specific situations.

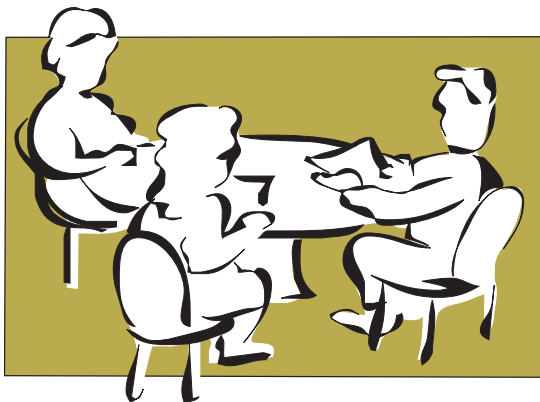
8. Statutory filing fees still apply to filings that are accomplished through the e-file system. Please be sure to select the appropriate filing fee when submitting something that requires one. If a fee is due and you have not selected the proper filing fee then the filing will not be accepted and will be returned. An exception to this is the inventory fee. The e-file system cannot calculate the inventory fee at this time. If you are *submitting* your inventory for filing you should do so through the e-file system, then pay the inventory fee either in person or through the mail. If you are only *presenting* the inventory, that must be done in person or through the mail and the fee paid the same way.

Don't forget that guides and training materials including videos are available through links on the e-filing login page. Check out www.oakgov.com/clerkrod/Pages/efiling for a list of upcoming training sessions at the courthouse. These free sessions are open to you and your staff. No registration is required.

As always, if you have questions, please don't hesitate to contact us so we can assist you.

DID YOU KNOW...

THE OCBA HAS ROOMS AVAILABLE TO RENT FOR CLIENT MEETINGS, DEPOSITIONS, MEDIATIONS, TRAININGS, AND MORE?



- Four different meeting rooms available that can accommodate up to 70 people
- Discounted rates for OCBA members beginning as low as \$20 per hour.
- Laptop computer, LCD projector, flipchart easel, and other A/V equipment available for use (additional fees may apply)

Contact the OCBA Receptionist, Mary Kuhn, at (248) 334-3400
for more information and to reserve a date!