

# THE COURTS

## Title 201—RULES OF JUDICIAL ADMINISTRATION

[ 201 PA. CODE CH. 40 ]

### Amendment of Rules 4001—4016 of the Rules of Judicial Administration; No. 466 Judicial Administration Doc.

#### Order

*Per Curiam*

And Now, this 12th day of August, 2016, *It Is Ordered* pursuant to Article V, Section 10 of the Constitution of Pennsylvania that Rules 4001—4016 of the Pennsylvania Rules of Judicial Administration are amended in the following form.

This *Order* shall be processed in accordance with Pa.R.J.A. No. 103(b), and shall be effective January 1, 2017, except in the First Judicial District, in which it shall be effective July 1, 2017. For the period from January 1, 2017 through July 1, 2017, the First Judicial District shall be governed by Pa.R.J.A. Nos. 5000.1—5000.13, which are rescinded as to all other judicial districts as of January 1, 2017.

#### Annex A

### TITLE 201. RULES OF JUDICIAL ADMINISTRATION

#### CHAPTER 40. UNIFORM RULES GOVERNING COURT REPORTING AND TRANSCRIPTS

Rule 4001. Scope of Rules[ . ] and Policy.

(A) These rules shall govern the making, preserving and transcribing of the record of proceedings [ **before any trial court of record** ] in the judicial districts within the Unified Judicial System.

(B) Because complete and verbatim notes of testimony and transcripts are integral to the official record of court proceedings, it is the policy of the Unified Judicial System to ensure that (1) qualified court reporting services are available in each judicial district and that court reporters are fairly compensated, (2) transcripts are timely produced and are affordable to all litigants, and (3) efficient technologies are employed to reduce litigation costs and conserve public resources.

#### Comment

These rules are promulgated pursuant to the administrative and supervisory authority granted to the Supreme Court by Article V, § 10 of the Pennsylvania Constitution. *See also* 42 Pa.C.S.A. § 1724(a)(10).

Pursuant to Order No. 466 Judicial Administration Docket (August 12, 2016), Pa.R.J.A. Nos. 4001—4016 shall become effective in the First Judicial District on July 1, 2017. For the period from January 1, 2017 through July 1, 2017, the First Judicial District shall be governed by Pa.R.J.A. Nos. 5000.1—5000.13, which are rescinded as to all other judicial districts as of January 1, 2017.

Rule 4002. Definitions.

*Condensed transcript* means a miniaturized copy of the original transcript printed in such a way as to place more than one page of transcript on a single sheet of paper.

*Court Administrator* means the Court Administrator of Pennsylvania.

*Court recorder* means an individual employed, contracted or utilized by a court to record testimony by electronic means (audio or audio-visual).

*Court reporter* means an individual employed, contracted or utilized by a court to record testimony whether through use of a stenotype machine, stenomask equipment, written symbols, or otherwise.

*Court reporter's dictionary* is a computer file that matches a court reporter's steno strokes with English text. A court reporter's personal dictionary is an essential part of a computer aided transcription (CAT) system.

*Court reporting personnel* includes court reporters, court recorders, transcriptionists and any other personnel whether employed or contracted who make the court record for use in any Pennsylvania court.

*Daily transcript* means a transcript delivered within eighteen (18) hours of an official request, not including weekends or official court holidays. For the purposes of additional payment, a transcript is a daily transcript only if it is in fact delivered within the above time limit.

*Digital audio files* are those files created by digital recording systems and saved in a format that allows storage and playback through computer applications.

*District Court Administrator* means the County Court Administrator.

*Electronic transcript* means an official transcript delivered in an electronic, non-paper medium.

*Expedited transcript* means a transcript delivered within seventy-two (72) hours of an official request, not including weekends or official court holidays. For the purposes of additional payment, a transcript is an expedited transcript only if it is in fact delivered within the above time limit.

*Filing office* refers to an office without regard to title that has the responsibility and function in each judicial district to maintain the official dockets and case files of the court.

[ *Financial institution account identifiers* means financial institution account numbers, credit card numbers, debit card numbers, PINS or passwords to secure accounts, and other account identifying information. ]

*Notes of testimony* means the official recording of an oral proceeding made whether through use of an electronic device, stenomask equipment, stenotype machine, written symbols, or otherwise; and includes the dictionary, media storage files, and other documentation needed to prepare a transcript.

*Ordinary transcript* means a transcript [ **ordered for delivery within the time limits set forth in Rule 4011** ] necessary for an appeal or to otherwise advance litigation and required under a time frame set by a Pennsylvania Rule of Court regarding the delivery of court transcripts or by court order. An example of a non-ordinary transcript is one requested by a litigant when no matters are open before the court or where the transcript is ordered by a third party.

**President Judge** means the president judge in each judicial district, his or her designee, or any judicial officer recognized by the Court Administrator as having administrative authority.

**Rough draft transcript** (computer diskette, hard paper copy, or electronically distributed) is an unedited and uncertified transcript that may contain untranslated or mistranslated stenotype symbols. This also includes notes that appear on paper, unedited electronic data, tapes or other media in the original state in which they existed when they were taken at the time of testimony.

**Same day delivery** means transcripts delivered within 6 hours of the close of the court session, divided by morning and afternoon with the line of demarcation being lunch or mid-day recess.

**Transcript** means a certified, written, verbatim record of a proceeding.

**Transcriptionist** means any person employed, contracted or utilized by a court to prepare a transcript of a proceeding from an electronic or other recording. A court recorder and a court reporter may also serve as a transcriptionist.

#### **Rule 4003. Committee on Court Reporting and Transcripts.**

(A) The Committee on Court Reporting and Transcripts shall consist of the following members appointed by the Supreme Court of Pennsylvania, one of whom shall be designated as Chair and one of whom shall be designated as Vice-Chair:

- (1) One representative of the Superior Court of Pennsylvania;
- (2) One representative of the Commonwealth Court of Pennsylvania;

(3) Two president judges of the courts of common pleas chosen from among the judicial districts of the Commonwealth;

#### **(4) Two members of the County Commissioners Association of Pennsylvania;**

**[ (4) ] (5)** The district court administrator of the Philadelphia County Court of Common Pleas;

**[ (5) ] (6)** The district court administrator of the Allegheny County Court of Common Pleas;

**[ (6) ] (7)** Two district court administrators chosen from among the judicial districts of the Commonwealth other than Philadelphia and Allegheny;

**[ (7) ] (8)** Two providers of court reporting services representing the various methods currently in usage within Pennsylvania; and

**[ (8) ] (9)** Two members of the Pennsylvania Bar.

(B) Initial appointments shall be for one-, two- or three-year terms, and these members may serve one additional three-year term. Thereafter appointments shall be for three years and members shall serve no more than two consecutive three-year terms. A replacement appointee shall serve for the balance of the unexpired term.

(C) The Committee shall review current rules and practices, and, upon concurrence of the Court Administrator, recommend revisions to the Uniform Rules Governing Court Reporting and Transcripts as may be necessary to effectuate the policy of these rules.

(D) The Administrative Office shall provide staff support to the Committee.

#### **Rule 4004. Qualifications [ and Certification ] of Court Reporters and Court Recorders.**

(A) No person shall be employed or utilized by a court as a court reporter or court recorder unless **[ certified ] approved** by the president judge or his or her designee as meeting the minimum criteria set forth in subdivision (B)(1), (B)(2), or (C) except

(1) those persons already employed or utilized by a court at the time of the adoption of these rules or

(2) those court reporters who hold and maintain a professional certification.

(B) The minimum criteria for **[ certification ] qualification** of a court reporter, **for both stenographic and voice writing**, are the following:

(1) stenographic requirements: the court reporter is capable of recording proceedings at a 95% accuracy level at the following speeds:

- (a) literary at 180 w.p.m.
- (b) jury charge at 200 w.p.m.
- (c) testimony and question and answer at 225 w.p.m.

(2) voice writing requirements: the court reporter is capable of recording proceedings at a 95% accuracy level at the following speeds:

- (a) literary at 200 w.p.m.
- (b) jury charge at 225 w.p.m.
- (c) two-voice question and answer at 250 w.p.m.

(C) The minimum criteria for **[ certification ] qualification** of a court recorder are the following:

(1) full familiarity with the controls of the electronic audio or audio-visual equipment;

(2) adequate hearing acuity to assure a high quality recording;

(3) insistence on clarity of the recording;

(4) ability to quickly diagnose and correct routine malfunctions;

(5) proficiency in note taking; and

(6) understanding of courtroom procedures and vocabulary.

(D) All persons employed or utilized by a court as a court reporter or court recorder, including those employed or utilized prior to the adoption of these rules, shall be **[ recertified ] requalified** as meeting the above criteria at least every three (3) years.

(1) Court reporters shall be **[ recertified ] requalified every three (3) years** upon completion of thirty (30) hours of continuing professional education **[ every three (3) years ] which has been properly accredited or certified by the National Court Reporters Association**. Proof of attendance shall be submitted to the president judge or his or her designee.

(2) Court recorders shall be **[ recertified ] requalified every three (3) years**. The president judge may rely upon reports of the district court administrator and the judicial district's judges and quasi-judicial officers to determine whether the requirements set forth in subdivision (C) are satisfactorily met. Those reports must be

based on recent courtroom experience and a review of work products (e.g., lists, log notes, CD recordings) for accuracy, timeliness and quality.

(E) Any person who fails to meet the minimum criteria at the time of [ **recertification** ] **requalification** shall be given six months to comply. Anyone who fails to comply with this subdivision shall be prohibited from serving as a court reporter or court recorder.

[ (F) **The president judge shall verify annually to the Court Administrator compliance with this rule on forms developed by the Administrative Office.** ]

#### **Rule 4005. Approval of Transcriptionists.**

No person or organization shall be employed or utilized by a court as a transcriptionist unless approved by the president judge.

#### **[ Comment**

**The American Association of Electronic Reporters and Transcribers (AAERT) recommends the following criteria for transcriptionists: (a) scores at least 70% on an examination with a timed, 100-question, written examination on technical aspects of electronic reporting, courtroom procedures, and vocabulary; and (b) scores at least 98% accuracy on at least ten text pages produced during a half-hour AAERT-prepared audiotape in ASCII, Word, WordPerfect, or WordStar. ]**

#### **Rule 4006. Employment and Duties of Court Reporting Personnel.**

(A) The president judge or his or her designee shall select, appoint, and supervise court reporting personnel for the district. The number of court reporting personnel in any district shall be adequate to support the full and unrestricted operation of the courts.

(B) The president judge or his or her designee shall assign court reporting personnel in a manner as to

(1) cover all proceedings and timely produce all transcripts; and

(2) substantially equalize the workload of recording testimony, and of transcript production and generating fees.

(C) All court reporting personnel are officers of the court with a duty to comply with all court regulations and orders and to maintain the highest standards of professional and ethical conduct.

(D) No court reporting personnel shall work outside his or her official duties [ **unless in full compliance with all rules regarding timeliness of transcripts** ] unless such work is permitted under the Code of Conduct For Employees of the Unified Judicial System (see Section VI (F)) and he or she is in substantial compliance with these rules regarding timeliness of transcripts as determined by the president judge.

(E) [ **All court reporters using computer-aided transcription are required to submit to the president judge or his or her designee a copy of the reporter's dictionary upon employment or contractual engagement. An updated dictionary must be provided to the president judge or his or her designee at least quarterly.** ] **All court reporters must ensure that the court will have access and the ability to obtain the notes of testimony and all**

**other record proceedings of the court in the event of the inability, unavailability, or unwillingness of the court reporter to do so within the time frame established by these rules.**

#### **Comment**

**The Committee recommends that court reporters assure, in the event of unavailability or incapacity, that the court is able to access court reporter notes or work product so that all transcripts can be recovered. The Committee recommends that each court reporter should provide certification every 6 months that at a minimum, the court reporter has provided one of the following methods or mechanisms for recovering transcripts:**

(1) **contracting with an available scopist capable of translating the court reporter's notes;**

(2) **generating court reporter notes on a software program recognized by the court/district court administrator;**

(3) **providing the district court administrator with a current copy of the court reporter's dictionary; and/or**

(4) **providing translated steno notes in ASCII format.**

(F) Court reporters, court recorders and transcriptionists shall file a monthly report with the district court administrator of all ordered or requested transcripts **for matters on appeal**, in chronological order indicating the date of each order or request, the case name and number, whether the transcript requires rapid completion (e.g., a Children's Fast Track appeal), the approximate length of the record to be transcribed, the status of the transcription, and the expected date of the filing of the transcript. A court reporter, court recorder or transcriptionist must coordinate **with** the district court administrator or his or her designee whenever courtroom coverage must be arranged in order to timely deliver the transcript.

(G) [ **The district court administrator shall prepare a summary statistical report of the number of transcripts requested, delivered and pending, as well as the age of all pending transcripts, which shall be forwarded to the Administrative Office quarterly on forms designed by the Court Administrator.** ] **The president judge shall determine the internal procedure in his or her judicial district for tracking the timely fulfillment of all other requests and orders for transcript of court proceedings in matters not under appeal. It is the duty of each president judge or his or her designee to assure compliance with the timely delivery of all transcripts as required by these rules.**

(H) **The district court administrator shall prepare a summary statistical report of all cases under appeal including the number of transcripts requested, delivered and pending, as well as the age of all pending transcripts, which shall be forwarded to the Administrative Office quarterly on forms designed by the Court Administrator.**

[ (H) ] (I) **All court reporting personnel and county administrative personnel are required to comply with all standing and special requests of the Administrative Office for information, including information on transcript cost and fee payments and data relative to transcript production, delivery, and delay.**



**Rule 4007. Requests for Transcripts.**

(A) All requests for transcripts shall be set forth on a standardized form provided by the Court Administrator. The form shall indicate the current rates authorized to be charged for transcripts under these rules.

(B) For an ordinary transcript, the party requesting a full or partial transcript of a trial or other proceeding shall file the original request with the **district court administrator or other** appropriate filing office of the court. **[ Copies of the formal request shall be delivered ]** The requesting party shall also serve copies of the formal request to:

- (1) the judge presiding over the matter;
- (2) the court reporter, court recorder or transcriptionist;
- (3) the district court administrator or his or her designee **(if not filed with the district court administrator)**; and
- (4) opposing counsel, but if not represented, the opposing party.

(C) In courts where daily, expedited, **same day** or rough draft transcripts are available, requests for these transcripts shall be filed in writing in the appropriate filing office at least 10 days prior to the proceeding. Copies of the written request shall be delivered as required by subsection (B). In the event of an emergency, a party may request by oral motion a daily, expedited or rough draft transcript.

(D) When a **[ private litigant who is responsible for the costs ]** litigant requests a transcript,

(1) the litigant ordering a transcript shall make partial payment **[ of the estimated cost of the transcript to the court's designee ]** in an amount established by local rule. Deposit checks are to be made payable to the judicial district or county, **as set by local rule, and shall be delivered to the district court administrator or other court designee.**

(2) the court reporter or transcriptionist shall prepare the transcript upon direction of the court's designee.

(3) the court reporter, court recorder or transcriptionist shall notify the ordering party and the court's designee of the completion of the transcript and deliver a copy of the transcript to the judge presiding over the matter. Checks for the final balance are to be made payable to the judicial district or county.

(4) upon payment of any balance owed, the court reporter, court recorder or transcriptionist shall deliver the original transcript to the appropriate filing office and copies to the parties. **Checks for the final balance are to be made payable to the judicial district or county, as set by local rule, and shall be delivered to the district court administrator or other court designee.**

(E) When a litigant requests a transcript, but cannot pay for the transcript because of alleged economic hardship, the court shall determine economic hardship pursuant to the procedure set forth in Rule 4008(B). In cases of economic hardship, where the matter is under appeal or a transcript is necessary to advance the litigation, the costs of procuring the transcript shall be waived or otherwise adjusted by the court. In cases of economic hardship where there is no appeal pending or there

exists no obvious need for the transcript to advance the litigation, the requesting party must demonstrate reasonable need before the court shall waive or adjust the cost of obtaining the transcript.

**[ (E) ] (F)** When a transcript is requested for which the court or county is responsible for the cost, the court reporter, court recorder or transcriptionist shall prepare the transcript **[ upon receipt of the request ]** without the necessity of a deposit.

**Comment**

Nothing in this rule prevents a local court from adopting an electronic filing request procedure provided the request is effectively communicated to the listed persons.

Within the framework of these rules, the particular methods and logistics for receiving and accounting for costs is left to the discretion of the president judge and district court administration. Note, however, that deposit checks and final payment checks are to be made payable to the judicial district or county, not to the individual court reporter or transcriptionist preparing the transcript.

It is anticipated that court reporters shall continue to be compensated for the preparation of transcripts pursuant to local rule or practice. It is not contemplated that this rule shall interfere with or otherwise limit the income of court reporters. In this regard, the Committee recognizes that in certain jurisdictions, court reporters earn a substantial portion of their income through the preparation of transcripts. It shall remain the duty of the president judge and district court administrator to assure that the implementation of these rules does not unfairly limit the ability of court reporters to be properly compensated for their professional services.

The rule also recognizes that unreasonable demands for free or reduced-cost transcripts can result in a significant economic burden on the court system; for this reason, the rule attempts to distinguish necessary and nonessential requests.

**Rule 4008. Transcript Costs Payable by a Requesting Party Other Than the Commonwealth or a Subdivision Thereof.****(A) Costs**

(1) The costs payable by a requesting party, other than the Commonwealth or a subdivision thereof, for **[ an electronic ]** a transcript in an electronic format shall not exceed:

- (a) for an ordinary transcript, **[ \$2.25 ] \$2.50** per page;
- (b) for an expedited transcript, **[ \$3.25 ] \$3.50** per page; **[ and ]**
- (c) for a daily transcript, **[ \$4.25 ] \$4.50** per page **[ . ];** and
- (d) for same day delivery, **\$6.50** per page.

(2) When the transcript is prepared in bound paper format, the costs shall be in accordance with paragraph (1) relating to electronic format plus a surcharge of \$0.25 per page.

**Comment**

The rules encourage the use of electronic transcripts which will result in reduced costs for preparing and distributing transcripts. No-cost, user-friendly software is available for converting text files into PDF format (see

Rule 4010(B)). Unlike paper transcripts, electronic transcripts can offer features such as keyword searches, copy and paste functions, and speedy transmission. Moreover, the ability to store transcripts and reporters' notes on disks and networks should greatly reduce the courts' storage costs. Electronic systems support the business trend of moving toward paperless operations and also respond to ecological concerns by reducing paper waste.

Many [judges] attorneys/litigants prefer to read paper transcripts, including condensed transcripts, and these rules do not inhibit the practice. However, when a condensed paper transcript is ordered by a party, the surcharge of \$0.25 per page in Rule 4008(A)(2) shall refer to \$0.25 per sheet of paper, regardless of the number of pages of transcript on the sheet.

(B) *Economic hardship—minimum standards*

(1) Transcript costs for ordinary transcripts **in matters under appeal or where the transcript is necessary to advance the litigation** shall be waived for a litigant who has been permitted by the court to proceed *in forma pauperis* or whose income is [below] less than 125 percent of the poverty line as defined by the U.S. Department of Health and Human Services (HHS) poverty guidelines for the current year.

(2) Transcript costs for ordinary transcripts **in matters under appeal or where the transcript is necessary to advance the litigation** shall be reduced by one-half for a litigant whose income is less than 200 percent of the poverty line as defined by the HHS poverty guidelines for the current year.

(3) [The court shall advise litigants of the procedure for requesting a waiver or reduction of costs.] Transcript costs for ordinary transcripts in matters that are not subject to an appeal, where the transcript is not necessary to advance the litigation, or for expedited, daily, rough draft or same day transcripts may be waived at the court's discretion for parties who qualify for economic hardship under subdivision (B)(1) or (B)(2) and upon good cause shown.

(4) The application to waive all or a portion of costs for ordinary transcripts shall be supported by an affidavit substantially in the form required by Rule 240(h) of the Pennsylvania Rules of Civil Procedure.

**Comment**

Transcript costs can be quite expensive. By establishing minimum standards, subdivision (B) is intended to ensure that costs do not effectively deny access to the court system to impoverished persons and persons of limited financial means when further proceedings necessitate a transcript. The rule also recognizes that unreasonable demands for free or reduced-cost transcripts can result in a significant economic burden on the court system; for this reason, the rule attempts to distinguish necessary and nonessential requests. Procedures for waiving or reducing transcripts costs must be published by the court and clearly communicated to litigants.

Litigants who have been approved for representation by legal aid services are not required to prove economic hardship. Legal aid clients shall be entitled to obtain ordinary transcripts for no cost.

(C) *Assignment and allocation of transcript costs*

(1) *Assignment of costs.* The requesting party, or party required by general rule to file a transcript, shall be responsible for the cost of the transcript. Costs shall not be assessed against any party for transcripts prepared at the initiation of the court.

(2) *Allocation of costs.* When more than one party requests the transcript, or are required by general rule to file the transcript, the cost shall be divided equally among the parties.

(D) *Copies of transcript*

[ (1) An electronic copy of the transcript shall be provided without charge to all parties other than the requesting party. A paper copy may be purchased at the surcharge rate specified in Rule 4008(A)(2). ]

(2) The cost of copies prepared for the court or filing office are included in the costs set forth in Rule 4008(A) and shall not be charged to any party.

(3) The cost charged to the public for a copy of a transcript that has been filed of record shall not exceed \$0.25 per page. ]

A request for a copy of any transcript previously ordered, transcribed and filed of record shall be provided according to the following schedule:

- (1) \$0.75 per page bound, paper format; and,
- (2) \$0.50 per page electronic copy.

**Comment**

[ As no additional effort is needed to produce a copy of an electronic transcript, no copy charges may be levied upon the parties. With respect to a non-party (i.e., general public) request for a photocopy of a transcript, Rule 4007(D)(4) anticipates that the filing offices of the judicial district are the proper custodians of court case records and transcripts. Rule 4008(D)(3) provides that the cost charged to the public for a transcript copy that has been filed of record shall not exceed \$0.25 per page, regardless of the form or location in which the transcript is filed or stored. At this time, the rules do not require the sale of electronic transcripts to the public. ]

With respect to a non-party (i.e., general public) request for a photocopy of a transcript, Rule 4007(D)(4) anticipates that the filing offices of the judicial district are the proper custodians of court case records and transcripts. Rule 4008(D) provides that the cost charged to the public for a transcript copy that has been filed of record shall not exceed \$0.75 per page, regardless of the form or location in which the transcript is filed or stored.

(E) *Additional Costs*

No transcript or related costs may be charged to the parties or the public other than those listed in subdivisions (A), (B) and (D) without the written approval of the Court Administrator, except that a judicial district may enact a local rule that permits a trial judge to impose a reasonable surcharge in cases such as mass tort, medical malpractice or other unusually complex litigation, where there is a need for court reporters to significantly expand their dictionary.

### Comment

Pursuant to local rule, a reasonable fee may be charged for a secure electronic feed which instantaneously delivers the translated notes from the court reporter to a laptop, tablet, phone, or other portable electronic device via cable, wifi, router, or Bluetooth to parties, the media, or other interested individuals. There shall be no fee charged to the court for such a connection.

#### (F) *Requests for Rate Increases*

The president judge of a judicial district may request an increase in the rates prescribed in subdivision (A) or (D) by submitting a written request to the Committee on Court Reporting and Transcripts. The request shall only be approved where it is established that the judicial district faces an economic hardship caused by the current rates and that the requested rates are reasonable. If the Committee approves the request by majority vote, it shall be forwarded to the Court Administrator for review. If the Court Administrator determines that the increase is necessary, the request shall be forwarded to the Supreme Court.

### Comment

These rules do not supersede any existing Pennsylvania Rule of Court regarding the delivery of court transcripts. If there appears to be a conflict with an existing Pennsylvania Rule of Court, such rule remains in full force and effect. However, if there appears to be a conflict with any local rule of court for the delivery of transcripts, these rules take precedence.

Rule 4009. Fees [ Payable to the Court Reporter or Transcriptionist by the Judicial District ] and Procedures. Local Rule.

Each judicial district shall promulgate and publish a local rule establishing the fees to be paid [ to court reporters and transcriptionists for all court reporting products ] for all court reporting products, the procedure for requesting a transcript, and the procedure for requesting a full or partial fee waiver pursuant to Rule 4008(B).

**Official Note:** For rules governing the promulgation of local rules, see Pa.R.J.A. No. [ 103(c) ] 103.

### [ Comment

By local rule, each judicial district shall set forth a comprehensive schedule of fees to be paid to court reporting personnel for all transcript products. While the maximum costs that may be charged to litigants or the public is fixed by Rule 4008, and may not be exceeded, a judicial district has the discretion to pay court reporters and transcriptionists a differing amount. In sum, these rules provide that litigants pay the transcript costs to the court according to the statewide schedule set forth in Rule 4008. The court, in turn, pays transcript fees to the court reporting personnel according to the fee schedule set by the judicial district.

The fee schedule of a judicial district must specify the fees that court reporters and transcriptionists are paid for both transcripts requested by litigants and transcripts requested by the Commonwealth or a subdivision thereof. Therefore, at a minimum, the local rule required in Rule 4009 must include the fees payable to court reporters and

transcriptionists for (1) private-party transcripts, (2) transcripts ordered by governmental entities, (3) indigency and economic hardship cases, and (4) accelerated delivery surcharges. ]

### Rule 4010. Format of Transcript.

(A) The format of paper transcripts shall be as follows:

[ (1) *Size*. Paper size shall be 8 1/2 x 11 inches.

(2) *Paper*. Paper shall be opaque, white, archival quality paper, at least 13 pounds for both originals and copies.

(3) *Preprinted Marginal Lines*. Pages shall contain preprinted solid left and right marginal lines. Preprinted top and bottom marginal lines are optional.

(4) *Line Numbers*. Each page shall bear numbers indicating each line of transcription on the page.

(5) *Number of Lines per Page*. Each page shall contain 25 lines of text. The last page may contain fewer lines if it is less than a full page of transcription. Page numbers or notations (e.g., page headers) shall not be considered part of the 25 lines of text.

(6) *Margins*. Typing shall begin on each page at the 1 3/4 inch left margin and continue to the 3/8 inch right margin.

(7) *Type Size*. The letter character size is to be 12 point with 10 letters to the inch. This type size provides for approximately 63 characters to each line. Courier 12 point type is recommended.

(8) *Spacing*. Lines of text shall be double spaced.

(9) *Indentations*.

(a) *Q and A*. All "Q" and "A" designations shall begin at the left margin. The statement following the "Q" and "A" shall begin on the fifth space from the left margin. Subsequent lines shall begin at the left margin. Since depositions read at a trial have the same effect as oral testimony, the indentations for "Q" and "A" should be the same as described above. In the transcript, each question and answer read should be preceded by a quotation mark. At the conclusion of the reading, a closing quotation mark should be used.

(b) *Colloquy*. Speaker identification shall begin on the tenth space from the left margin followed directly by a colon. The statement shall begin on the third space after the colon. Subsequent lines shall begin at the left margin.

(c) *Quotations*. Quoted material other than depositions shall begin on the tenth space from the left margin, with additional quoted lines beginning at the tenth space from the left margin, with appropriate quotation marks used.

(d) *Interruptions of Speech and Simultaneous Discussions*. Interruptions of speech shall be denoted by the use of a dash at the point of interruption, and again at the point the speaker resumes speaking.

(e) *Page Heading (also known as "Headers")*. A page heading is brief descriptive information noted to aid in locating a person and/or event in a transcript. Page headings shall appear above line 1 on the same line as the page number. This information shall not be counted as a line of transcript.



(f) *Parentheses.* Parenthetical notations shall be marked by parentheses. They shall begin with an open parenthesis on the fifth space from the left margin, with the remark beginning on the sixth space from the left margin. Parentheses are used for customary introductory statements such as call to order of court or swearing in a witness. Parentheses are also used for indicating non-verbal behavior, pauses, and readback/playback. ]

(1) No fewer than 25 typed lines on standard 8-1/2 x 11 paper.

(2) No fewer than nine or 10 characters to the typed inch.

(3) Left-hand margin to be set at no more than 1-3/4 inches.

(4) Right-hand margin to be set at no more than 3/8 inch.

(5) Each question and answer to begin on a separate line.

(6) Each question and answer to begin no more than five spaces from the left-hand margin with no more than five spaces from the Q and A to the text.

(7) Carry-over Q & A lines to begin at the left-hand margin.

(8) Colloquy material to begin no more than 15 spaces from the left-hand margin, with carry-over colloquy to the left-hand margin.

(9) Quoted material to begin no more than 15 spaces from the left-hand margin, with carry-over lines to begin no more than 10 spaces from the left-hand margin.

(10) Parentheticals and exhibit markings to begin no more than 15 spaces from the left-hand margin, with carry-over lines to begin no more than 15 spaces from the left-hand margin.

(B) Electronic transcripts shall comply with the format standards set forth in Rule 4010(A)(3) through [ (9) ] (10) for paper transcripts and, in addition, shall be in PDF format with the following settings:

- (1) *functions disabled:* content changes; and
- (2) *functions enabled:* search, select, copy, paste and print.

#### Comment

Rule 4010 standards for both paper and electronic transcripts, which [ **closely follow federal court standards** ] follow the standards of the National Court Reporters Association, assure that all transcripts of proceedings before the Pennsylvania courts are formatted in the same way, whether prepared by official court reporters or transcriptionists, contract or per diem personnel, or by transcription companies.

#### Rule 4011. Deadline for Delivery of Transcript.

(A) [ **The** ] Unless otherwise ordered by the court, the court reporter or transcriptionist shall deliver the transcript [ **within 30 calendar days of receiving notice to prepare the transcript as provided by Rule 4007, unless an accelerated timeframe is mandated by law** ] for those cases under appeal within 14 days of receiving notice from the district court administrator or the court's designee, as required by Pa.R.A.P. 1922(a). [ The court reporter or tran-

scriptionist, upon a showing of good cause to the president judge or his or her designee, may request an extension of the deadline for a period of time not to exceed an additional 30 days. In no case shall more than one extension be granted. ]

(B) The court reporter or transcriptionist shall deliver transcripts for all other requests within 30 calendar days of receiving notice from the district court administrator or the court's designee, as provided by Rule 4007, unless an accelerated time frame is mandated by court order, law or local rule.

(C) For requests made by a party required to post a deposit under Rule 4007, the 30-day period for delivery of the transcript shall not commence until the Rule 4007 deposit is received by the court. In those cases involving economic hardship under Rule 4008, the 30-day period for delivery of the transcript shall not commence until disposition of the application for waiver or reduction of costs. In cases where a reduction of costs is granted, the time frame commences once the reduced deposit is received by the court.

(D) The court reporter or transcriptionist, upon a showing of good cause to the president judge, may request an extension of the deadline for a period of time not to exceed an additional 30 days. In no case shall more than one extension be granted.

[ (B) ] (E) Transcripts prepared pursuant to the Children's Fast Track Appeal program shall be given priority.

*Official Note:* For rules governing children's fast track appeals, see Pa.R.A.P. 102 *et seq.*

(F) Requests for transcripts unrelated to cases under appeal or in cases where no court order has been entered directing transcription shall not be given priority. However, in any event such transcripts shall be filed and delivered within 45 days, absent an extension for good cause approved by the President Judge.

#### Comment

These rules do not supersede any existing Pennsylvania Rule of Court regarding the delivery of court transcripts. If there appears to be a conflict with an existing Pennsylvania Rule of Court, such Rule remains in full force and effect. However, if there appears to be a conflict with any local rule of court for the delivery of transcripts, these Rules take precedence.

#### Rule 4012. Sanctions for Delayed Transcript.

(A) The president judge may take disciplinary action[ , including reassignment, reduction of fees, contempt of court, or decertification ] against any court reporter, court recorder, or transcriptionist [ **who impedes the prompt administration of justice, whether by protracted delinquency in a single case or by engaging in a pattern of delinquency in a number of cases** ] where noncompliance with these Rules impedes the prompt administration of justice, whether by protracted delinquency in a single case or by engaging in a pattern of delinquency in a number of cases.

[ (B) The failure of a court reporter or transcriptionist to complete the notes within the time imposed by these rules or by court order, which delays transmission of the complete record to the

appellate court, interferes with the reviewing court's proceedings. The appellate court may enter an order to compel the preparation, filing and transmission of the notes and may take disciplinary action including contempt of court or reduction of fees.

(C) A district court administrator or his or her designee may cause a transcript to be prepared by another court reporter or transcriptionist from notes in the event of the inability, unavailability, or unwillingness of the individual who took the notes to do so within the time ordered by the court.

(D) (B) The Court Administrator shall notify the Supreme Court of Pennsylvania of instances of unreasonable delay in preparing transcripts. The Court Administrator may recommend imposition of sanctions, including [ **decertification** ] **disqualification** of individual court reporters or transcriptionists.

[ (E) ] (C) The president judge shall ensure that the number, proficiency and organization of court reporting personnel in any district are adequate to support the full and unrestricted operation of the courts. When transcript delay is caused by an insufficient supply of qualified court reporters or other staff resources, or inefficient management of the court reporting operation, the Supreme Court may direct the president judge to take immediate corrective actions.

#### **Rule 4013. Certification of Transcript.**

Court reporting personnel who take the notes, record or transcribe a proceeding shall certify that the transcript of proceedings is true and correct and meets the format specifications established by the Supreme Court of Pennsylvania in Rule 4010. When more than one person was engaged in the production of the transcript, each shall certify as to his or her contribution.

#### **Rule 4014. Redaction of Personal Data Identifiers.**

(A) On its own motion, or upon motion of any party, the court may order the court reporter or transcriptionist preparing the transcript to redact [ **the following personal data identifiers:** ] **confidential, personal and/or financial data and other identifiers.**

- [ (1) **Social Security numbers;**
- (2) **financial institution account identifiers;**
- (3) **dates of birth;**
- (4) **names of minor children;**
- (5) **home addresses and telephone numbers; and**
- (6) **other identifiers as privacy and security may require. ]**

(B) Information that is redacted shall, unless otherwise directed by the court, appear in transcripts that are provided to the court and to the parties, but not in any transcript filed in the appropriate filing office or provided to any other requestor.

#### **Rule 4015. Ownership of Notes.**

Notes of testimony of court proceedings, stenographic notes, tapes, rough draft transcripts or other media used by court reporting personnel to record or monitor a proceeding in or for a court as well as any transcriptions thereof, are the exclusive property of the judicial district.

#### **Comment**

Nothing in these rules prohibits someone who has lawfully obtained a transcript from making a copy.

The ownership of court reporting software and equipment, when purchased by the court reporter, shall remain the property of the court reporter, unless the terms of employment with the district court provide otherwise.

#### **Rule 4016. Storage and Retention.**

(A) Each judicial district shall make provision for the archiving, storage and retention of transcribed and untranscribed notes of testimony, rough draft transcripts, reporter and recorder log notes, tapes, other electronic or digital audio files, and any hardware, software, tools or dictionaries necessary for proper transcription.

(B) Notes of testimony and other materials specified in subdivision (A) shall be retained in compliance with the *Record Retention and Disposition Schedule with Guidelines* adopted by the Supreme Court.

#### **Comment**

Each judicial district is responsible for the preservation of the transcript production materials listed in Rule 4016(A) in a form that guarantees their accuracy, authenticity, and accessibility. These materials must be protected from loss arising from personnel turnover in the court, environmental hazards, or unsecured access.

[ **Exhibits admitted into evidence are part of the court record and must be maintained with the official court record in the appropriate filing office. Excluded here are drugs, weapons, and other dangerous materials kept in secure locations by law enforcement for production on appeal or for a new trial, or pending forfeiture or destruction order of the court. Original materials shall not be maintained in the personal files of court reporting personnel. ]**

[Pa.B. Doc. No. 16-1476. Filed for public inspection August 26, 2016, 9:00 a.m.]

## **Title 231—RULES OF CIVIL PROCEDURE**

### **PART II. ORPHANS' COURT RULES**

#### **[ 231 PA. CODE PART II ]**

**Order Amending the Index and Rescinding and Replacing Forms OC-01 through OC-06 and RW-06 through RW-10 in the Appendix to the Orphans' Court Rules; No. 702 Supreme Court Rules Doc.**

#### **Order**

*Per Curiam*

*And Now*, this 9th day of August, 2016, upon the recommendation of the Orphans' Court Procedural Rules Committee; the proposal having been submitted without publication pursuant to Pa.R.J.A. No. 103(a)(3) in the interest of justice and efficient administration:

*It Is Ordered* pursuant to Article V, Section 10 of the Constitution of Pennsylvania that:

1) The Index to the Appendix of the Pennsylvania Orphans' Court Rules is amended; and



2) Forms OC-01 through OC-06 and RW-06 through RW-10 in the Appendix to the Pennsylvania Orphans' Court Rules are rescinded and replaced

in the following form.

This *Order* shall be processed in accordance with Pa.R.J.A. No. 103(b) and shall be effective September 1, 2016 for all legal papers, pleadings, or notices filed or served as of that date.

### Annex A

## TITLE 231. RULES OF CIVIL PROCEDURE

### PART II. ORPHANS' COURT RULES

#### INDEX TO APPENDIX

#### ORPHANS' COURT AND REGISTER OF WILLS FORMS ADOPTED BY SUPREME COURT PURSUANT TO Pa. O.C. Rule [ 1.3 ] 1.8

Available as Fill-in Forms on Website  
of Administrative Office of Pennsylvania Courts  
<http://www.pacourts.us/Forms/OrphansCourtForms.htm>

#### Orphans' Court and Administration Forms

##### A. *Audit and Administration Forms*

[ 1. Petition for Adjudication—Decedent's Estate  
(Pa.O.C. Rule 6.9) ..... OC-01

2. Petition for Adjudication—Trust Estate  
(Pa.O.C. Rule 6.9) ..... OC-02

3. Petition for Adjudication—Guardian of Estate  
of Incapacitated Person (Pa.O.C. Rule 6.9) ... OC-03

4. Petition for Adjudication—Guardian of Estate  
of Minor (Pa.O.C. Rule 6.9) ..... OC-04

5. Petition for Adjudication—Principal's Estate  
under POA (Pa.O.C. Rule 6.9)..... OC-05 ]

1. Decedent's Estate: Petition for Adjudication/  
Statement of Proposed Distribution Pursuant to Pa.  
O.C. Rule 2.4 ..... OC-01

2. Trust: Petition for Adjudication/Statement  
of Proposed Distribution Pursuant to Pa. O.C.  
Rule 2.4 ..... OC-02

3. Guardianship of Incapacitated Person: Petition  
for Adjudication/Statement of Proposed Distribu-  
tion Pursuant to Pa. O.C. Rule 2.4..... OC-03

4. Guardianship of Minor: Petition for Adjudi-  
cation/Statement of Proposed Distribution Pursu-  
ant to Pa. O.C. Rule 2.4 ..... OC-04

5. Principal's Estate (Under Power of Attorney):  
Petition for Adjudication/Statement of Proposed  
Distribution Pursuant to Pa. O.C. Rule 2.4 ... OC-05

6. Notice of Charitable Gift [ (Pa. O.C. Rule 5.5) ] (In  
Accordance with Pa. O.C. Rule 4.4) ..... OC-06

7. Notice of Claim ..... OC-07

##### B. *Guardianship Forms*

1. Important Notice—Citation with Notice (Pa. O.C.  
Rule 14.5) ..... G-01

2. Annual Report—Guardian of Estate ..... G-02

3. Annual Report—Guardian of Person ..... G-03

4. Guardian's Inventory ..... G-04

[ 5. Petition for Adjudication—Guardian of Estate  
of Incapacitated Person ..... OC-03\*

6. Petition for Adjudication—Guardian of Estate  
of Minor ..... OC-04\*\* ]

5. Guardianship of Incapacitated Person: Petition  
for Adjudication/Statement of Proposed Distribu-  
tion Pursuant to Pa. O.C. Rule 2.4..... OC-03\*

6. Guardianship of Minor: Petition for Adjudi-  
cation/Statement of Proposed Distribution Pursu-  
ant to Pa. O.C. Rule 2.4 ..... OC-04\*\*

\* Form OC-3 is not reprinted here and is located under  
Audit and Administration Forms at No. 3.

\*\* Form OC-4 is not reprinted here and is located  
under Audit and Administration Forms at No. 4.

##### C. *Abortion Control Act Forms*

1. Minor's Application for Judicial Authorization of an  
Abortion (Pa. O.C. Rule 16.10) ..... ACA-01

2. Confidential Unsworn Verification by a Minor (Pa.  
O.C. Rule 16.10) ..... ACA-02

##### D. *Register of Wills Forms*

1. Estate Information Sheet ..... RW-01  
(Not adopted by Supreme Court; form promulgated by  
Department of Revenue and maintained with Register of  
Wills forms for convenience)

2. Petition for Grant of Letters ..... RW-02

3. Oath of Subscribing Witness(es) ..... RW-03

4. Oath of Non-subscribing Witness(es) ..... RW-04

5. Oath of Witness(es) to Will Executed by  
Mark ..... RW-05

6. Renunciation ..... RW-06

7. [ Pa. O.C. Rule 5.6 Notice ] Notice of Estate  
Administration Pursuant to Pa. O.C. Rule  
10.5 ..... RW-07

8. Certification of Notice under Pa. O.C. Rule [ 5.6(a) ]  
10.5 ..... RW-08

9. [ Estate ] Inventory ..... RW-09

10. Pa. O.C. Rule [ 6.12 ] 10.6 Status Report .. RW-10

##### E. *Model Forms of Account*

1. National Fiduciary Accounting Standards Project—  
1983 Report of Fiduciary Accounting Standards Commit-  
tee

2. Model Estate Account

3. Model Trust Account

4. Model Charitable Remainder Unitrust Account

##### F. [ Foreign ] Adoption Forms

[ 1. Registration Forms—Pa.O.C. Rule 15.8

a. Petition to Register Foreign Adoption Decree

b. Final Decree—Granted

c. Final Decree—Denied

d. Instructions for Filing Petition

2. Completion of Foreign Adoption Forms—  
Pa.O.C. Rule 15.9

a. Preliminary Decree

b. Final Decree

c. Petition for Adoption of a Foreign Born Child

d. Report of the Intermediary

**e. Verification of Translator ]**

**1. Notice of Orphans' Court Proceedings to be Filed With Clerk in Dependency Proceeding by Solicitor of County Agency (Pa. O.C. Rule 15.6(b))**

**a. Praeipere to Clerk in Dependency Proceeding of Filing of a Petition to Terminate Parental Rights, Confirm Consent, or Adopt**

**b. Praeipere to Clerk in Dependency Proceeding of Entry of Decision Disposing of Petition**

**c. Praeipere to Clerk in Dependency Proceeding of Filing of Notice of Appeal**

**d. Praeipere to Clerk in Dependency Proceeding of Entry of Decision Disposing of Appeal**

**2. Foreign Adoption Forms**

**a. Form for Registration of Foreign Adoption Decree (Pa. O.C. Rule 15.8), including Instructions for Filing Petition, Petition to Register Foreign Adoption Decree, and Proposed Final Decrees**

**b. Form Petition for Adoption of a Foreign Born Child (Pa. O.C. 15.9), including the Petition for Adoption of a Foreign Born Child, Report of the Intermediary, Verification of Translator, Preliminary Decree, and Final Decree**

**DECEDENT'S ESTATE**

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, DECEASED

No. \_\_\_\_\_

**PETITION FOR ADJUDICATION /  
STATEMENT OF PROPOSED DISTRIBUTION  
PURSUANT TO Pa. O.C. Rule 2.4**

*This form shall be used in all cases involving the Audit or Confirmation of the Account of a Decedent's Estate. If space is insufficient, riders may be attached. Attach the papers required under items 1, 2, 4, 8, 10, 16-19, as applicable, and any instrument pertinent to the adjudication.*

***INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.***

Name of Counsel: \_\_\_\_\_

Supreme Court I.D. No.: \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_



Estate of \_\_\_\_\_, Deceased

1. Name(s) and address(es) of Petitioner(s):

Petitioner:

Petitioner:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Identify any Executors or Administrators who have not joined in the Petition for Adjudication/Statement of Proposed Distribution and/or the Account and state reason:

\_\_\_\_\_

Is this the first accounting for this estate? . . . . . ☐ Yes ☐ No

If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Pursuant to 20 Pa.C.S. § 3501.2, if property from a trustee, guardian, or agent acting under a power of attorney is being received into the estate, an Account of the administration of such trust, guardianship, or principal's estate may be annexed to the Estate Account. Is any such Account annexed to this Estate Account? . . . . . ☐ Yes ☐ No

If so, the annexed Account and the appropriate fully completed Petition for Adjudication/Statement of Proposed Distribution for the annexed matter should be filed as Exhibits to this Petition.

2. Decedent died on \_\_\_\_\_.

☐ Letters Testamentary *or* ☐ Letters of Administration were granted to Petitioner(s) on \_\_\_\_\_.

Date of Will (*if applicable*): \_\_\_\_\_

Date(s) of Codicil(s) (*if applicable*): \_\_\_\_\_

Date of probate (*if different from date Letters granted*): \_\_\_\_\_

Was a bond required? ☐ Yes ☐ No If yes, state amount: \_\_\_\_\_

Are proofs of advertising of the grant of Letters attached? . . . . . ☐ Yes ☐ No

Dates of advertising of the grant of Letters:

\_\_\_\_\_  
\_\_\_\_\_

Estate of \_\_\_\_\_, Deceased

3. Was decedent survived by a spouse? ..... ☐ Yes ☐ No

If yes, name of the surviving spouse: \_\_\_\_\_

4. Has the surviving spouse filed to take an elective share? ..... ☐ Yes ☐ No ☐ N/A  
(see 20 Pa.C.S. § 2201 et seq.)

If yes, attach a copy of the election and state date of election: \_\_\_\_\_

5. In the case of an intestacy, state the names of the decedent's surviving children or surviving issue of deceased children (*if none, so state*):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Did decedent marry after execution of Will or Codicil(s)? ..... ☐ Yes ☐ No ☐ N/A

Were any children born to decedent after execution of Will or Codicil(s)? ..... ☐ Yes ☐ No ☐ N/A

If yes, give names and dates of birth:

*Name:*

*Date of Birth:*

_____	_____
_____	_____
_____	_____
_____	_____

7. Was a request for a statement of claim, as required by the Medical Assistance Estate Recovery Act, 62 P.S. § 1412, sent to the Department of Human Services? ..... ☐ Yes ☐ No ☐ N/A

Estate of \_\_\_\_\_, Deceased

8. Written notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to all interested parties listed in item 9 below, all unpaid creditors and all claimants listed in item 10 below. In addition, notice of any questions requiring adjudication as discussed in item 15 below has been or will be given to all persons affected thereby. If one of the beneficiaries is a trust or another estate and any of the accountants is also a fiduciary of the receiving trust or estate, provide written notice of the Account's filing to the beneficiaries of the trust or receiving estate, as applicable, if known.
- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice.
  - B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by a Petitioner or counsel certifying that such Notice has been given.
  - C. If any such interested person is not *sui juris* (e.g., minors or incapacitated persons), Notice has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.
  - D. If any charitable interest is involved, Notice has been or will also be given to the Attorney General as required under Pa. O.C. Rule 4.4. In addition, the Attorney General's clearance certificate (or proof of service of Notice and a copy of such Notice) must be submitted herewith or at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions.
9. List all parties (charitable and non-charitable) of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the estate as beneficiaries under the Will (if beneficiary is a trust, name the trust and trustee as the Interested Party ) or Codicil(s) or as intestate heirs if there is a complete or partial intestacy. This list shall:
- A. State each party's relationship to the decedent and the nature of each party's interest(s):

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>



Estate of \_\_\_\_\_, Deceased

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>

- B. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons). For each such party, give date of birth, the name of each Guardian and how each Guardian was appointed. If no Guardian has been appointed, identify the next of kin of such party, giving the name, address and relationship of each.

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- C. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed (see Pa. O.C. Rule 5.5).

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Estate of \_\_\_\_\_, Deceased

D. If distribution is to be made to the personal representative of a deceased party, state date of death, date and place of grant of Letters and type of Letters granted.

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10. Other than the claim for the family exemption, list the names of all known claimants and the amount of their claims and state whether each claim is admitted.

<i>Name and Address of Each Claimant</i>	<i>Amount of Claim</i>	<i>Claim Admitted?</i>	<i>Will Claim Be Paid In Full?</i>
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

If the estate is insolvent, attach a schedule setting forth the order of preference under 20 Pa.C.S. § 3392 and the proposed payments.

Estate of \_\_\_\_\_, Deceased

11. Was family exemption claimed? ..... ☐ Yes ☐ No

Was family exemption allowed? ..... ☐ Yes ☐ No

**Family exemption claimant's name and relationship:**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

12. The amount of Pennsylvania Transfer Inheritance Tax paid, the date(s) of payment(s), and the interest(s) upon which paid, are as follows:

<i>Date</i>	<i>Payment</i>	<i>Interest</i>

13. On the date of death, was the decedent a fiduciary (personal representative, trustee, guardian, agent under power of attorney) or surety on the bond of a fiduciary? ..... ☐ Yes ☐ No

If yes, provide the name of the estate, indicate whether an Account has been filed and confirmed and all awards performed, or, in the alternative, how the decedent's estate will be discharged for the decedent's fiduciary administration of the estate.

[illegible]



Estate of \_\_\_\_\_, Deceased

14. On the date of death, was the decedent a party (as a plaintiff or defendant) in any litigation? ..... ☐ Yes ☐ No

If yes, provide the caption of the litigation, docket number, where the matter is currently pending, and its status.

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15. A. Describe in detail any questions requiring adjudication and state the position of the Petitioner(s) as to each question:

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- B. Has notice of the question requiring adjudication been given to the parties identified in Paragraph 9 above? ..... ☐ Yes ☐ No

16. If Petitioner(s) has/have knowledge that a share has been assigned, renounced, disclaimed or attached, provide a copy of the assignment, renunciation, disclaimer or attachment, together with any relevant supporting documentation.

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Estate of \_\_\_\_\_, Deceased

17. Had the decedent been adjudicated an incapacitated person? ..... ☐ Yes ☐ No

If yes, attach a copy of the Order if available; otherwise state the Court, docket number, date, and name of Hearing Judge.

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18. A. List or attach a separate list of additional receipts and disbursements since the closing date of the Account.

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- B. Has notice of the additional receipts and disbursements been given to the parties identified in Paragraph 9 above? ..... ☐ Yes ☐ No

19. If a reserve is requested, state amount and purpose.

Amount: \_\_\_\_\_

Purpose: \_\_\_\_\_

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If a reserve is requested for counsel fees, has notice of the amount of fees to be paid from the reserve been given to the interested parties ? ..... ☐ Yes ☐ No

If so, attach a copy of the notice.

Estate of \_\_\_\_\_, Deceased

20. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? . . . . ☐ Yes ☐ No

As to real estate only? . . . . . ☐ Yes ☐ No

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

**A. Income:**

*Proposed Distributee(s)*

*Amount/Proportion*

_____	_____
_____	_____
_____	_____

**B. Principal:**

*Proposed Distributee(s)*

*Amount/Proportion*

_____	_____
_____	_____
_____	_____

Submitted By:

*(All petitioners **must** sign. Place additional signatures on attachment if necessary):*

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
Name of Corporate Fiduciary

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Name of Representative and Title

\_\_\_\_\_  
Signature of Petitioner

\_\_\_\_\_  
Signature of Officer/Representative

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner



Estate of \_\_\_\_\_, Deceased

(Verification must be by **at least one** petitioner.)

### Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Petitioner

### Verification for Corporate Petitioner

The undersigned hereby verifies that *he/she* \_\_\_\_\_ is *title* \_\_\_\_\_ of the above-named *name of corporation* \_\_\_\_\_ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Representative for Corporate Petitioner

### Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Counsel for Petitioner

**TRUST**

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

NAME OF TRUST

(TRUST UNDER WILL OF \_\_\_\_\_

or

TRUST UNDER DEED OF \_\_\_\_\_

DATED \_\_\_\_\_)

No. \_\_\_\_\_

**PETITION FOR ADJUDICATION /  
STATEMENT OF PROPOSED DISTRIBUTION  
PURSUANT TO Pa. O.C. Rule 2.4**

*This form shall be used in all cases involving the Audit or Confirmation of Trust Accounts. If space is insufficient, riders may be attached. Attach the papers required under items 2, 4, 15-19, as applicable, and any instrument pertinent to the adjudication.*

***INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.***

Name of Counsel: \_\_\_\_\_

Supreme Court I.D. No.: \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name of Trust: \_\_\_\_\_

1. Name(s) and address(es) of Petitioner(s):

Petitioner:

Petitioner:

Name: \_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Identify any Trustees who have not joined in the Petition for Adjudication/Statement of Proposed Distribution and/or the Account and state reason:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Pursuant to 20 Pa.C.S. § 7799.1, if property from a personal representative or a trustee of another trust is being received by this Trust, an Account of the administration of such estate or trust may be annexed to the Trust Account. Is any such Account annexed to this Trust Account? ..... ☐ Yes ☐ No

If so, the annexed Account and the appropriate fully completed Petition for Adjudication/Statement of Proposed Distribution for the annexed matter should be filed as Exhibits to this Petition.

3. Check if any of the following issues are involved in this case:

- A. Appointment of Trustee ..... ☐  
B. Interpretation ..... ☐  
C. Discharge of Trustee ..... ☐  
D. Transfer of Situs ..... ☐  
E. Appointment of *Ad Litem* ..... ☐  
F. Minor, Unborn or Unascertained Beneficiary(ies) ..... ☐  
G. Principal Distribution ..... ☐  
H. Partial/Full Termination of Trust ..... ☐  
I. Missing Beneficiary(ies) ..... ☐  
J. *Cy Pres* ..... ☐  
K. Other Issues ..... ☐

List:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Trust: \_\_\_\_\_

***Please note:***

**A detailed explanation of issues checked should be set forth at item 15 below.**

**4. Testamentary Trust:**

Decedent's date of death: \_\_\_\_\_

Date of Decedent's Will: \_\_\_\_\_

Date(s) of Codicil(s): \_\_\_\_\_

Date of probate: \_\_\_\_\_

Judicial District or County where Letters were issued: \_\_\_\_\_

***or***

**Inter Vivos Trust:**

Date of Trust: \_\_\_\_\_

Date(s) of Amendment(s): \_\_\_\_\_

If Settlor is deceased and letters were not issued or the personal representative did not advertise the estate, state dates when the Trustee advertised Settlor's death and attach proofs of advertising:

\_\_\_\_\_  
\_\_\_\_\_

Is this inter vivos trust a Special Needs Trust established under  
42 U.S.C. § 1396p(d)(4)? ..... ☐ Yes ☐ No

5. Explain why venue is proper before this Court (*see 20 Pa.C.S. § 7714*), and why the Trust's situs is located in this judicial district or county (*see 20 Pa.C.S. § 7708*).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. A. If any other Court has taken jurisdiction of any matter relating to this Trust, explain:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Is this the first accounting of this Trust? ..... ☐ Yes ☐ No



Name of Trust: \_\_\_\_\_

- C. If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

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7. A. State how each Trustee was appointed:

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- B. If a Petitioner is not a Trustee (e.g., executor or administrator of deceased trustee, agent or guardian of an incapacitated trustee), explain:

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8. State how and when the present fund was awarded to Trustee(s):

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9. Period covered by this Account: \_\_\_\_\_ to \_\_\_\_\_.

10. Current fair market value of the Trust principal is \$ \_\_\_\_\_ (see page \_\_\_\_\_ of Account.)

11. State concisely the dispositive provisions of the Trust:

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Name of Trust: \_\_\_\_\_

12. Explain the reason for filing this Account (if filed because of the death of a party, state name of person, relationship to Trust and date of death):

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13. A. State the amount of Pennsylvania Transfer Inheritance Tax paid (including postponed tax on remainder interests), the dates of payment and the interests upon which such amounts were paid:

<i>Date</i>	<i>Payment</i>	<i>Interest</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

- B. If any such taxes remain unpaid or are in dispute, explain:

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14. Describe any questions requiring adjudication and state the position of Petitioner(s) as to each question and give details of any issues identified in item 3:

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15. Written notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to all interested parties listed in item 16 below. If any person is being asked to represent the interests of another interested party (whether *sui juris* or not), the person asked to serve as a representative has been so notified and given an opportunity to decline pursuant to 20 Pa.C.S. § 7725. In addition, notice of any questions requiring adjudication as discussed in item 14 above has been or will be given to all persons affected thereby. If one of the beneficiaries is a trust or estate and any of the accountants is also a fiduciary of the receiving trust or estate, provide written notice of the Account's filing to the beneficiaries of the receiving trust or estate, as applicable, if known.

Name of Trust: \_\_\_\_\_

- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such notice. Unless contained in the attached Notice, attach a copy of the written notice provided to any person who is being asked to represent another or attach such person's consent to serve.
- B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by Petitioner(s) or counsel certifying that such Notice has been given. Unless contained in the Notice or previously attached, a copy of the written notice provided to any person who is being asked to represent another or such person's consent to serve shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions.
- C. If any such interested party is not *sui juris* (e.g., minors or incapacitated persons), Notice has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.
- D. If any charitable interest is involved, Notice has been or will also be given to the Attorney General as required under Pa. O.C. Rule 4.4. In addition, the Attorney General's clearance certificate (or proof of service of Notice and a copy of such Notice) must be submitted herewith or at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions.
- E. If the Account before the Court is a Special Needs Trust established under 42 U.S.C. § 1396p(d)(4), Notice has been or will also be given to the Pennsylvania Department of Human Services, Special Needs Trust Depository and to the applicable department of any other state that has provided the special needs beneficiary with medical care under a state medical assistance program ("Department"). In addition, the Department's letter of no objection (or proof of service of Notice and a copy of such Notice) must be submitted herewith or at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions.
16. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the Trust (if beneficiary is a trust, name the trust and trustee as the Interested Party), whether such interest is vested or contingent, charitable or non-charitable. This list shall:

- A. State each party's relationship to the Settlor/Decedent and the nature of each party's interest(s);

Name and Address of Each Interested Party	Relationship and Comments, if any	Interest

Name of Trust: \_\_\_\_\_

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>

B. If any interested party (whether *sui juris* or not) is not receiving Notice of the filing of the Account and the Petition for Adjudication/Statement of Proposed Distribution because another individual is proposed to represent such interested party pursuant to 20 Pa.C.S. §§ 7721-7726, provide the information below for each proposed representative. If there is more than one proposed representative, attach a rider setting forth the information below for each additional proposed representative:

(i) Name of Proposed Representative: \_\_\_\_\_

Describe Proposed Representative's Interest(s) in Trust:

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Name of the interested parties or description of the class of interested parties whom the person named above is to represent and describe such persons' interest in Trust:

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(ii) Has any person who is proposed to be represented as identified in the question above notified a Trustee in writing that he or she objects to such representation? ..... ☐ Yes ☐ No

If yes, provide Name(s) of Person(s) objecting to being represented:

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(iii) Specify the subparagraph(s) under 20 Pa. C.S. § 7723 authorizing representation:

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(iv) Is there any conflict of interest? ..... ☐ Yes ☐ No

If yes, explain conflict and why representation should be permitted:

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Name of Trust: \_\_\_\_\_

(v) Has Proposed Representative provided written consent? . . . . . ☐ Yes ☐ No

If no, has Proposed Representative declined in writing to  
act in the representative capacity as requested? . . . . . ☐ Yes ☐ No

If Proposed Representative has neither consented to act in writing nor declined  
in writing to act, provide date of the letter in which Proposed Representative  
was notified that he or she is to represent another person or class of interested  
parties: \_\_\_\_\_

- C. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons).  
For each such party, give date of birth, the name of each Guardian and how each  
Guardian was appointed. If no Guardian has been appointed, identify the next of kin  
of such party, giving the name, address and relationship of each.

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- D. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed  
(see Pa. O.C. Rule 5.5).

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- E. If distribution is to be made to the personal representative of a deceased party,  
state date of death, date and place of grant of Letters and type of Letters granted

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Name of Trust: \_\_\_\_\_

17. If Petitioner(s) has/have knowledge that a Trust share has been assigned, renounced, disclaimed or attached, provide a copy of the assignment, renunciation, disclaimer or attachment, together with any relevant supporting documentation.

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18. If a Trustee's principal commission is claimed:

A. If based on a written agreement, attach a copy thereof.

B. If a principal commission is claimed, state amount. \$ \_\_\_\_\_

C. If a principal commission is claimed, state the amounts and dates of any principal commissions previously paid in prior accounting periods.

_____	_____
_____	_____
_____	_____
_____	_____

19. If a reserve is requested, state amount and purpose.

Amount: \_\_\_\_\_

Purpose: \_\_\_\_\_

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If a reserve is requested for counsel fees, has notice of the amount of fees to be paid from the reserve been given to the interested parties? ..... ☐ Yes ☐ No

If so, attach a copy of the notice.

20. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? . . . ☐ Yes ☐ No

Name of Trust: \_\_\_\_\_

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

A. Income:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____
_____	_____

B. Principal:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____
_____	_____

Submitted By:  
(*All petitioners must sign. Place additional signatures on attachment if necessary*):

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
Name of Corporate Fiduciary

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Name of Representative and Title

\_\_\_\_\_  
Signature of Petitioner

\_\_\_\_\_  
Signature of Officer/Representative

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner

Name of Trust: \_\_\_\_\_

(Verification must be by **at least one** petitioner.)

#### Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Petitioner

#### Verification for Corporate Petitioner

The undersigned hereby verifies that *he/she* \_\_\_\_\_ is *title* \_\_\_\_\_ of the above-named *name of corporation* \_\_\_\_\_ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Representative for Corporate Petitioner

#### Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Counsel for Petitioner

**GUARDIANSHIP OF INCAPACITATED PERSON**

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, AN INCAPACITATED PERSON  
ACCOUNT OF \_\_\_\_\_, GUARDIAN  
No. \_\_\_\_\_

**PETITION FOR ADJUDICATION /  
STATEMENT OF PROPOSED DISTRIBUTION  
PURSUANT TO Pa. O.C. Rule 2.4**

*This form shall be used in all cases involving the Audit or Confirmation of the Account of a Guardian of the Estate of an incapacitated person. If space is insufficient, riders may be attached. Attach the papers required under items 2, 3, and 5, as applicable, and any additional decree or instrument pertinent to the adjudication.*

**INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.**

Name of Counsel: \_\_\_\_\_  
Supreme Court I.D. No.: \_\_\_\_\_  
Name of Law Firm: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

Estate of \_\_\_\_\_, An Incapacitated Person

1. Name(s) and address(es) of Petitioner(s):

<p>Petitioner:</p> <p>Name: _____</p> <p>Address: _____</p> <p>_____</p>	<p>Petitioner:</p> <p>_____</p> <p>_____</p> <p>_____</p>
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Identify any Guardians of the Estate who have not joined in the Petition for Adjudication/ Statement of Proposed Distribution and/or the Account and state reason:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Judicial District or County issuing Adjudication of Incapacity: \_\_\_\_\_

Date of Adjudication of Incapacity: \_\_\_\_\_

Date of Appointment as Guardian: \_\_\_\_\_

Attach copy(ies) of Decree(s).

3. A. Explain the reason for filing this Account (if incapacitated person has died, state date of death, name and address of personal representative and of his or her counsel and attach a Short Certificate if available. If incapacitated person has been adjudged to have regained capacity, state date of Decree and attach a copy. If Account is filed for any other reason, state address of incapacitated person):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

B. Is this the first accounting for this estate? ..... ☐ Yes ☐ No

If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

\_\_\_\_\_

\_\_\_\_\_

4. A. Identify each unpaid claim against the incapacitated person or the incapacitated person's estate and describe each in detail (*if none, so state*):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Estate of \_\_\_\_\_, An Incapacitated Person

- B. Describe in detail any questions requiring adjudication and state the position of the Petitioner(s) as to each question:

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- C. If guardian or attorney fees are being claimed, state amount and the period covered for the requested fees:

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5. Written Notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to all interested parties listed in item 6 below. In addition, notice of any known unpaid claim not admitted, all questions requiring adjudication and any requested fees as discussed in item 4 above has been or will be given to all persons affected thereby.

- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice.

- B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by a Petitioner or counsel certifying that such Notice has been given.

- C. If any such interested party is not *sui juris* (e.g., minors or incapacitated persons), Notice of the Account's filing has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.

Estate of \_\_\_\_\_, An Incapacitated Person

6. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the estate, including the incapacitated person's heirs at law. This list shall:

A. State each party's relationship to the incapacitated person and the nature of each party's interest(s):

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>

- B. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons). For each such party, give date of birth, the name of each Guardian and how each Guardian was appointed. If no Guardian has been appointed, identify the next of kin of such party, giving the name, address and relationship of each.

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- C. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed (see Pa. O.C. Rule 5.5).

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7. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? . . . . . ☐ Yes ☐ No

Estate of \_\_\_\_\_, An Incapacitated Person

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

A. Income:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

B. Principal:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

Submitted By:  
*(All petitioners **must** sign. Place additional signatures on attachment if necessary):*

Corporate Fiduciary (if applicable)

_____ Name of Corporate Fiduciary	_____ Name of Petitioner
_____ Name of Representative and Title	_____ Signature of Petitioner
_____ Signature of Officer/Representative	_____ Name of Petitioner
	_____ Signature of Petitioner

Estate of \_\_\_\_\_, An Incapacitated Person

(Verification must be by **at least one** petitioner.)

**Verification for Individual Petitioner**

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Petitioner

**Verification for Corporate Petitioner**

The undersigned hereby verifies that *he/she* \_\_\_\_\_ is *title* \_\_\_\_\_ of the above-named *name of corporation* \_\_\_\_\_ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Representative for Corporate Petitioner

**Certification of Counsel**

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Counsel for Petitioner

**GUARDIANSHIP OF MINOR**

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, A MINOR

ACCOUNT OF \_\_\_\_\_, GUARDIAN

No. \_\_\_\_\_

**PETITION FOR ADJUDICATION /  
STATEMENT OF PROPOSED DISTRIBUTION  
PURSUANT TO Pa. O.C. Rule 2.4**

*This form shall be used in all cases involving the Audit or Confirmation of the Account of a Guardian of the Estate of a minor or late minor. If space is insufficient, riders may be attached. Attach the papers required under items 2 and 5, as applicable, and any instrument pertinent to the adjudication.*

***INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.***

Name of Counsel: \_\_\_\_\_

Supreme Court I.D. No.: \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_



Estate of \_\_\_\_\_, A Minor

1. Name(s) and address(es) of Petitioner(s):

<p>Petitioner:</p> <p><i>Name:</i> _____</p> <p><i>Address:</i> _____</p> <p>_____</p>	<p>Petitioner:</p> <p>_____</p> <p>_____</p> <p>_____</p>
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Identify any Guardian of the Estate who have not joined in the Petition for Adjudication/Statement of Proposed Distribution and/or the Account and state reason:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Judicial District or County Appointing Guardian: \_\_\_\_\_

Date of Appointment as Guardian: \_\_\_\_\_

Attach copy(ies) of Decree(s).

3. A. Explain the reason for filing this Account (if minor has come of age, state date minor attained majority).

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

B. Is this the first accounting for this estate? ..... ☐ Yes ☐ No

If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. A. Identify each unpaid claim against the minor or the minor's estate and describe in detail (if none, so state):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estate of \_\_\_\_\_, A Minor

- B. Describe in detail any questions requiring adjudication and state the position of the Petitioner(s) as to each question:

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- C. If guardian or attorney fees are being claimed, state amount and the period covered for the requested fees:

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5. Written Notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to all interested parties listed in item 6 below. In addition, notice of any unpaid claim not admitted, all questions requiring adjudication, and any requested fees as discussed in item 4 above has been or will be given to all persons affected thereby.
- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice.
  - B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by a Petitioner or counsel certifying that such Notice has been given.
  - C. If any such interested party is not *sui juris* (e.g., minors or incapacitated persons), Notice of the Account's filing has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.

Estate of \_\_\_\_\_, A Minor

6. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the estate, including the minor's heirs at law. This list shall:

A. State each party's relationship to the minor and the nature of each party's interest(s):

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>

B. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons). For each such party, give date of birth, the name of each Guardian and how each Guardian was appointed. If no Guardian has been appointed, identify the next of kin of such party, giving the name, address and relationship of each.

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C. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed (see Pa. O.C. Rule 5.5).

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7. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? . . . . ☐ Yes ☐ No

Estate of \_\_\_\_\_, A Minor

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

A. Income:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

B. Principal:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

Submitted By:  
*(All petitioners **must** sign. Place additional signatures on attachment if necessary):*

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
 Name of Corporate Fiduciary

\_\_\_\_\_  
 Name of Petitioner

\_\_\_\_\_  
 Name of Representative and Title

\_\_\_\_\_  
 Signature of Petitioner

\_\_\_\_\_  
 Signature of Officer/Representative

\_\_\_\_\_  
 Name of Petitioner

\_\_\_\_\_  
 Signature of Petitioner

Estate of \_\_\_\_\_, A Minor

(Verification must be by **at least one** petitioner.)

#### Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Petitioner

#### Verification for Corporate Petitioner

The undersigned hereby verifies that *he/she* \_\_\_\_\_ is *title* \_\_\_\_\_ of the above-named *name of corporation* \_\_\_\_\_ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Representative for Corporate Petitioner

#### Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Counsel for Petitioner

**PRINCIPAL'S ESTATE**  
**(Under Power of Attorney)**

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, PRINCIPAL

ACCOUNT OF \_\_\_\_\_, AGENT(S) \*

No. \_\_\_\_\_

**PETITION FOR ADJUDICATION /**  
**STATEMENT OF PROPOSED DISTRIBUTION**  
**PURSUANT TO Pa. O.C. Rule 2.4**

*This form shall be used in all cases involving the Audit or Confirmation of the Account of one or more Agents acting under a Power of Attorney. If space is insufficient, riders may be attached. Attach the papers required under items 3, 4 and 9, as applicable, and any instrument pertinent to the adjudication.*

***INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.***

Name of Counsel: \_\_\_\_\_

Supreme Court I.D. No.: \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

\* The term "Agent" shall include any person designated as an "attorney-in-fact" or acting in a similar capacity by the Principal's delegation.



Estate of \_\_\_\_\_, Principal

1. Name(s) and address(es) of Petitioner(s):

Petitioner:

Petitioner:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name(s) and address(es) of Agent(s) (if not Petitioner(s)):

Agent:

Agent:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Identify any Agents who have not joined in the Petition for Adjudication/Statement of Proposed Distribution and/or the Account and state reason:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

2. Name and address of Principal (and, if applicable, of any Guardian appointed for Principal, of each personal representative for any Principal or Agent who has died, and of his or her counsel, identifying the capacity of each):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Judicial District or County where Principal resides, or if Principal is deceased, where Letters were issued: \_\_\_\_\_

3. A. Date of Principal's Power of Attorney under which Agent(s) acted:

\_\_\_\_\_

B. Date Agent(s) first exercised control of Principal's assets under Power of Attorney:

\_\_\_\_\_

(Attach copy of each different Power of Attorney granted to Agent(s) by Principal and copy of any Decree involving Agent(s) for Principal).

Estate of \_\_\_\_\_, Principal

4. A. Explain the reason for filing this Account (if Principal or Agent has died, state date of death, and attach a Short Certificate; if Principal has been adjudicated incapacitated, state date of Decree, and attach a copy):

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- B. Is this the first accounting for this Principal's estate? . . . . . ☐ Yes ☐ No

If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

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5. Describe all gifts/transfers for less than full and adequate consideration made under the Power of Attorney. Identify each recipient's name, address, and relationship to Principal and/or Agent, amount of each gift/transfer, nature of each (cash or kind), and date made, with any additional explanation deemed appropriate (*if none, so state*):

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6. Identify every asset or interest (include title or registration and value) of Principal known to Petitioner(s) and not identified in Account, whether or not in possession or control of Petitioner(s) (*if none known, so state*):

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Estate of \_\_\_\_\_, Principal

7. Identify each existing safe deposit box of or for Principal and each one closed by Agent(s) (if not applicable, so state):

<i>Institution &amp; Address</i>	<i>Box No.</i>	<i>Title or Registration</i>	<i>Date Closed (if applicable)</i>

Are the entire contents of each safe deposit box identified in item 7 above included in the filed Account? . . . . . ☐ Yes ☐ No

If not, explain:

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8. A. Identify each known unpaid claim against Principal or Principal's estate and describe each in detail (if none, so state):

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- B. Describe in detail any questions requiring adjudication and state the position of the Petitioner(s) as to each question:

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Estate of \_\_\_\_\_, Principal

- C. If fees are being claimed by the Agent or an attorney, state amount and the period covered for the requested fees:

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9. Written Notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to each interested party in the matter. In addition, notice of any known unpaid claim not admitted, all questions requiring adjudication, and any requested fees as described in item 8 above has been or will be given to all parties affected thereby.
- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice.
- B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by a Petitioner or counsel certifying that such Notice has been given.
- C. If any such interested party is not *sui juris* (e.g., minors or incapacitated persons), Notice of the Account's filing has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.
10. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the Principal's estate. This list shall:

- A. State each party's relationship to the Principal and the nature of each party's interest(s):

<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>

Estate of \_\_\_\_\_, Principal

- B. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons). For each such party, give date of birth, the name of each Guardian and how each Guardian was appointed. If no Guardian has been appointed, identify the next of kin of such party, giving the name, address and relationship of each.

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- C. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed (see Pa. O.C. Rule 5.5).

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11. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? . . . . . ☐ Yes ☐ No

Estate of \_\_\_\_\_, Principal

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

A. Income:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

B. Principal:

<i>Proposed Distributee(s)</i>	<i>Amount/Proportion</i>
_____	_____
_____	_____

Submitted By:  
*(All petitioners **must** sign. Place additional signatures on attachment if necessary):*

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
 Name of Corporate Fiduciary

\_\_\_\_\_  
 Name of Petitioner

\_\_\_\_\_  
 Name of Representative and Title

\_\_\_\_\_  
 Signature of Petitioner

\_\_\_\_\_  
 Signature of Officer/Representative

\_\_\_\_\_  
 Name of Petitioner

\_\_\_\_\_  
 Signature of Petitioner



Estate of \_\_\_\_\_, Principal

(Verification must be by **at least one** petitioner.)

#### Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Petitioner

#### Verification for Corporate Petitioner

The undersigned hereby verifies that *he/she* \_\_\_\_\_ is *title* \_\_\_\_\_ of the above-named *name of corporation* \_\_\_\_\_ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Representative for Corporate Petitioner

#### Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Counsel for Petitioner

**NOTICE OF CHARITABLE GIFT**

(In Accordance with Pa. O.C. Rule 4.4)

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, ☐ SETTLOR ☐ DECEASED  
 No. \_\_\_\_\_

Chief, Charitable Trusts and Organizations Section  
 Office of the Attorney General

Dear Sir or Madam:

Notice is given of a charitable gift as follows:

1. The nature of the present proceeding is an Account: ☐ Yes ☐ No If no, please proceed to Question 2.

(a) The Account is filed in a court with a separate Orphans' Court Division and has been or will be listed for Audit on \_\_\_\_\_,  
 in \_\_\_\_\_.  
*(State name of Courthouse and town/city.)*

The time and place of the Audit is Court Room \_\_\_\_\_ at \_\_\_\_\_ o'clock.  
 If not provided herein, the time and location will be provided upon request when that information becomes available.

- (b) The Account is filed in a court without a separate Orphans' Court Division, and the last day for filing written objections is \_\_\_\_\_, at \_\_\_\_\_ o'clock.

Any objection shall be filed with \_\_\_\_\_  
 on or before the date and time above. *(State name of Courthouse and town/city.)*

- (c) The Account concerns an estate or trust in which a charity has an interest or is a potential distributee. ☐ Yes ☐ No

If NO, the Account concerns an estate or trust in which all or part of the balance of assets remaining on hand will be distributed to:

- ☐ an estate in which a charity has an interest; or  
☐ a trust in which a charity is named as a qualified beneficiary as defined in 20 Pa.C.S. § 7703.

\* If more space is required, attach additional sheets.

Estate of \_\_\_\_\_, ☐SETTLOR ☐DECEASED

2. If the proceedings are other than an Account, state the nature of the proceedings and the place, date and time fixed for hearing:

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3. Charitable gifts are made as follows:

- (a) Give full names and addresses of charities, and the names and addresses of counsel for any charity who has received notice or has appeared for it:

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- (b) If pecuniary legacies, state exact amounts and indicate whether legacies will be or have been paid in full; if not, give reasons therefor.

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- (c) If the charitable interest is a future interest and the estimated present value of the charity's future interest exceeds \$25,000, a brief description thereof including the conditions precedent to its vesting in enjoyment and possession, the names and ages of persons known to have interests preceding such charitable interest, and the approximate market value of the property involved.

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Estate of \_\_\_\_\_, ☐ SETTLOR ☐ DECEASED

(d) If residuary gift, state nature and value of share.

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4. Provide a brief statement of all pertinent questions to be presented to the Court for adjudication or other disposition, including unresolved claims and any material questions of interpretation or distribution which may affect the value of the charitable interest.

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5. The names and addresses of the fiduciaries are (state whether Executors and/or Trustees):

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6. The names and addresses of counsel for the fiduciaries:

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Estate of \_\_\_\_\_, ☐ SETTLOR ☐ DECEASED

7. (a) A copy of the instrument creating the gift is attached hereto.
- (b) If the gift is other than a pecuniary legacy which will be paid in full, there is attached hereto:
- (1) A copy of the Account, if one has been filed
  - (2) A copy of any other relevant documents

Very truly yours,

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name of Counsel

\_\_\_\_\_  
Supreme Court I.D. No.

\_\_\_\_\_  
Name of Law Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Email

**RENUNCIATION**

## REGISTER OF WILLS

Estate of \_\_\_\_\_, Deceased

The undersigned, \_\_\_\_\_, in the capacity/relationship as  
(Name or Corporate Name)  
 \_\_\_\_\_ of the above Decedent, hereby renounces the right to administer  
 the Estate of the Decedent and, to the extent permitted by law pursuant to 20 Pa.C.S. § 3155, respectfully  
 requests that Letters be issued to \_\_\_\_\_.

\_\_\_\_\_  
(Date)

Name or Corporate Fiduciary (if applicable)

\_\_\_\_\_  
 Signature of Officer/Representative

\_\_\_\_\_  
 Signature of Person

\_\_\_\_\_  
 Title of Officer/Representative

\_\_\_\_\_  
 Address

\_\_\_\_\_  
 Address

\_\_\_\_\_  
 Telephone

\_\_\_\_\_  
 Telephone

\_\_\_\_\_  
 Email

\_\_\_\_\_  
 Email

***Executed in Register's Office***

Sworn to or affirmed and subscribed  
 before me this \_\_\_\_\_ day  
 of \_\_\_\_\_, \_\_\_\_\_.

***Executed out of Register's Office***

Before the undersigned personally appeared the  
 party executing this Renunciation and certified  
 that he or she executed the Renunciation for the  
 purposes stated within on this \_\_\_\_\_ day  
 of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
 Deputy for Register of Wills

\_\_\_\_\_  
 Notary Public

My Commission Expires:

(Signature and Seal of Notary or other official qualified to  
 administer oaths. Show date of expiration of Notary's Commission.)



**IMPORTANT NOTICE****NOTICE OF ESTATE ADMINISTRATION  
PURSUANT TO Pa. O.C. Rule 10.5**

**THIS NOTICE DOES NOT MEAN THAT YOU WILL RECEIVE ANY  
MONEY OR PROPERTY FROM THIS ESTATE OR OTHERWISE**

*Whether you will receive any money or property will be determined wholly or partly by the decedent's will. If the decedent died without a will, whether you will receive any money or property will be determined by the intestacy laws of Pennsylvania.*

BEFORE THE REGISTER OF WILLS,

IN RE: ESTATE OF \_\_\_\_\_, Deceased

File Number \_\_\_\_\_

TO: \_\_\_\_\_ (Beneficiary)  
\_\_\_\_\_ (Address)

Please take notice of the death of the Decedent and the grant of Letters to the personal representative(s) named below. The Decedent died on \_\_\_\_\_, a resident of \_\_\_\_\_

The Decedent died: \_\_\_\_\_ ☐ testate (with a Will) or ☐ intestate (without a Will).

You may have a beneficial interest in the estate as follows:

\_\_\_\_\_  
\_\_\_\_\_  
(If additional space is needed, use separate sheet)

The name(s), address(es) and telephone number(s) of all personal representatives appointed are:

NAME	ADDRESS	TELEPHONE
_____	_____	_____
_____	_____	_____

If the Decedent died testate, the Will has been filed with the Office of the Register of Wills of \_\_\_\_\_

If the Decedent died intestate, a Petition for the Grant of Letters of Administration was filed with the Office of the Register of Wills of \_\_\_\_\_

The Register's address is \_\_\_\_\_,  
and telephone number is \_\_\_\_\_.

A copy of the Will or Petition may be obtained by contacting the Register of Wills and paying the charges for duplication.

Date \_\_\_\_\_

Capacity: ☐ Personal Representative ☐ Counsel

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
Name of Corporate Fiduciary

\_\_\_\_\_  
Name of Person

\_\_\_\_\_  
Name of Representative and Title

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Email

\_\_\_\_\_  
Signature of Person

\_\_\_\_\_  
Signature of Officer/Representative

Form RW-07 eff. 09.01.16

**CERTIFICATION OF NOTICE UNDER Pa. O.C. Rule 10.5**

## REGISTER OF WILLS

Name of Decedent: \_\_\_\_\_

Date of Death: \_\_\_\_\_ File Number: \_\_\_\_\_

Date Letters Granted: \_\_\_\_\_

To the Register:

I certify that Notice of Estate Administration required by Pa. O.C. Rule 10.5 of the Orphans' Court Rules was served on or mailed to the following beneficiaries of the above-captioned estate on

\_\_\_\_\_, \_\_\_\_\_ :

Name:Address:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

*(If more space is needed, attach separate sheet.)*

Notice has now been given to all persons entitled thereto under Pa. O.C. Rule 10.5 except:

Date \_\_\_\_\_

Corporate Fiduciary (if applicable)

Capacity: ☐ Personal Representative ☐ Counsel

Name of Corporate Fiduciary

Name of Person

Name of Representative and Title

Address

Address

Telephone

Telephone

Email

Email

Signature of Officer/Representative

Signature of Person

Form RW-08 eff. 09.01.16

# INVENTORY

## REGISTER OF WILLS OF

COMMONWEALTH OF PENNSYLVANIA  
County of \_\_\_\_\_

} SS

File Number \_\_\_\_\_

The undersigned, \_\_\_\_\_, Personal Representative(s) of the Estate of \_\_\_\_\_ deceased, depose(s) and say(s) that the items appearing in the following Inventory include all of the personal assets wherever situated and all of the real estate in the Commonwealth of Pennsylvania of said Decedent, that the valuation placed opposite each item of said Inventory represents its fair value as of the date of Decedent's death, and that Decedent owned no real estate outside of the Commonwealth of Pennsylvania except that which appears in a memorandum at the end of this Inventory.

I verify that the statements made in this Inventory are true and correct. I understand that false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 relating to unsworn falsification to authorities.

Corporate Fiduciary (if applicable)

\_\_\_\_\_  
Name of Corporate Fiduciary

\_\_\_\_\_  
Signature of Personal Representative

\_\_\_\_\_  
Name of Representative and Title

\_\_\_\_\_  
Signature of Personal Representative

\_\_\_\_\_  
Signature of Officer/Representative

\_\_\_\_\_  
Date

Attorney -- (Name) \_\_\_\_\_ (Supreme Court I.D. No.) \_\_\_\_\_

(Name of Law Firm) \_\_\_\_\_

(Address) \_\_\_\_\_

(Telephone) \_\_\_\_\_

(Email) \_\_\_\_\_

DATE OF DEATH	LAST RESIDENCE	DECEDENT'S SOC. SEC. NO.
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**FIGURES MUST BE TOTALED**

*(Attach additional sheets as needed)*

**TOTAL:** \$0.00

NOTE: The Memorandum of real estate outside the Commonwealth of Pennsylvania may, at the election of the personal representative, include the value of each item, but such figures should not be extended into the total of the Inventory. (See 20 Pa. C.S. § 3301(b))

Form RW-09 eff. 09.01.16

**Pa. O.C. Rule 10.6 STATUS REPORT**

## REGISTER OF WILLS OF

Name of Decedent: \_\_\_\_\_

Date of Death: \_\_\_\_\_ File Number: \_\_\_\_\_

Pursuant to Pa. O.C. Rule 10.6, I report the following with respect to completion of the administration of the above-captioned estate:

1. State whether administration of the estate is complete: ..... ☐ Yes ☐ No
2. If the answer is No, state when the personal representative reasonably believes that the administration will be complete:  
\_\_\_\_\_
3. If the answer to No. 1 is YES, state the following:
  - a. Did the personal representative file a final account with the Court? ..... ☐ Yes ☐ No
  - b. The separate Orphans' Court No. (if any) for the personal representative's account is:  
\_\_\_\_\_
  - c. Did the personal representative state an account informally to the parties in interest? ..... ☐ Yes ☐ No
  - d. Copies of receipts, releases, joinders and approvals of formal or informal accounts may be filed with the Clerk of the Orphans' Court or may be attached to this report.

Date \_\_\_\_\_

Capacity: ☐ Personal Representative ☐ Counsel

Corporate Fiduciary (if applicable)

Name of Corporate Fiduciary \_\_\_\_\_

Name of Person \_\_\_\_\_

Name of Representative and Title \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Email \_\_\_\_\_

Signature of Officer/Representative \_\_\_\_\_

Signature of Person \_\_\_\_\_

Form RW-10 eff. 09.01.16

[Pa.B. Doc. No. 16-1477. Filed for public inspection August 26, 2016, 9:00 a.m.]

# Title 237—JUVENILE RULES

## PART I. RULES

### [ 237 PA. CODE CH. 1 ]

#### Order Amending Rule 105 of the Rules of Juvenile Court Procedure; No. 703 Supreme Court Rules Doc.

##### Order

*Per Curiam*

*And Now*, this 11th day of August, 2016, upon the recommendation of the Juvenile Court Procedural Rules Committee, the proposal having been published for public comment at 45 Pa.B. 4902 (August 22, 2015):

*It Is Ordered* pursuant to Article V, Section 10 of the Constitution of Pennsylvania that Rule 105 of the Pennsylvania Rules of Juvenile Court Procedure is amended in the following form.

This *Order* shall be processed in accordance with Pa.R.J.A. No. 103(b), and shall be effective on October 1, 2016.

##### Annex A

#### TITLE 237. JUVENILE RULES

### PART I. RULES

#### Subpart A. DELINQUENCY MATTERS

#### CHAPTER 1. GENERAL PROVISIONS

##### Rule 105. Search Warrants.

The Pennsylvania Rules of Criminal Procedure, Rules 200 through 211 and Rule 212(B), shall apply to search warrants in juvenile delinquency matters.

##### Comment

Search warrants for juvenile cases are not available for public inspection. The search warrant is to be treated as a juvenile record and the provisions of Rule 160(A) apply. Once a search warrant is executed, it is filed with the Court of Common Pleas and becomes a part of the official court record. Also, information contained in the affidavit of probable cause attached to the search warrant is a part of law enforcement records, which is also confidential. *See* 42 Pa.C.S. §§ 6307 & 6308 and Rule 160.

**Official Note:** Rule 105 adopted April 1, 2005, effective October 1, 2005. Amended August 11, 2016, effective October 1, 2016.

##### *Committee Explanatory Reports:*

Final Report explaining the provisions of Rule 105 published with the Court's Order at 35 Pa.B. 2214 (April 16, 2005).

Final Report explaining the amendments to Rule 1608 published with the Court's Order at 46 Pa.B. 5533 (August 27, 2016).

## FINAL REPORT<sup>1</sup> Amendment of Pa.R.J.C.P. 105

On August 11, 2016, the Court amended Pennsylvania Rule of Juvenile Court Procedure 105 concerning search warrants in juvenile delinquency matters to incorporate by reference Pennsylvania Rule of Criminal Procedure 212(B).

On October 22, 2013, the Court amended Pa.R.Crim.P. 212 to add that unexecuted warrants and affidavit(s) are not public records and should be destroyed upon return to the issuing authority. This amendment prompted the Committee to examine whether Pa.R.J.C.P. 105 should be amended to extend the "incorporation by reference" of that rule to include all or part of Pa.R.Crim.P. 212.

In its present form, Pa.R.Crim.P. 212(A) acknowledges that a warrant and affidavit in criminal matters are publicly available, but it limits access until the warrant has been executed. The Committee did not recommend referencing Pa.R.Crim.P. 212(A) because it might suggest that such access, albeit limited, extends to juvenile cases. *See also* Pa.R.J.C.P. 105, Comment, as amended.

Regarding Pa.R.Crim.P. 212(B), the Committee favored incorporating that provision into Pa.R.J.C.P. 105. While the Committee did not believe this information would be available in juvenile cases, it did agree that unexecuted warrants should be destroyed "[g]iven the potential harm to the subject of a search warrant." *See* Pa.R.Crim.P. 212, Comment.

[Pa.B. Doc. No. 16-1478. Filed for public inspection August 26, 2016, 9:00 a.m.]

# Title 249—PHILADELPHIA RULES

## PHILADELPHIA COUNTY

### Adoption of Philadelphia Criminal Rule 588. Motion for Return of Property. Post Deprivation Hearing; Administrative Order No. 02 of 2016

##### Order

*And Now*, this 11th day of August, 2016, the Supreme Court Criminal Procedural Rules Committee having reviewed the following Philadelphia Criminal Rule 588. Motion for Return of Property. Post Deprivation Hearing as required by Pa.R.J.A. 103, and having determined that the said local rule is not inconsistent with the Statewide Rules of Criminal Procedures, it is hereby *Ordered* and *Decreed* that Philadelphia Criminal Rule 588. Motion for Return of Property. Post Deprivation Hearing is hereby adopted and shall become effective thirty (30) days after publication in the *Pennsylvania Bulletin*.

This Administrative Order is issued in accordance with the April 11, 1986 order of the Supreme Court of Pennsylvania, Eastern District, No. 55 Judicial Administration, Docket No. 1. As required by Pa.R.J.A. 103(d), this Administrative Order and the proposed local rule were

<sup>1</sup> The Committee's Final Report should not be confused with the official Committee Comments to the rules. Also note that the Supreme Court does not adopt the Committee's Comments or the contents of the Committee's explanatory Final Reports.

submitted to the Supreme Court of Pennsylvania Criminal Procedural Rules Committee for review and written notification has been received from the Rules Committee certifying that the proposed local rule is not inconsistent with any general rule of the Supreme Court. This Administrative Order and the following local rule shall be filed with the Office of Judicial Records (formerly the Prothonotary, Clerk of Courts and Clerk of Quarter Sessions) in a docket maintained for Administrative Orders issued by the First Judicial District of Pennsylvania. As required by Pa.R.J.A. 103(d)(5)(ii), two certified copies of this Administrative Order and the following local rule, as well as one copy of the Administrative Order and local rule shall be distributed to the Legislative Reference Bureau on a computer diskette for publication in the *Pennsylvania Bulletin*. As required by Pa.R.J.A. 103(d)(6) one certified copy of this Administrative Order and local rule shall be filed with the Administrative Office of Pennsylvania Courts, shall be published on the website of the First Judicial District at <http://courts.phila.gov>, and shall be incorporated in the compiled set of local rules no later than 30 days following publication in the *Pennsylvania Bulletin*. Copies of the Administrative Order and local rule shall also be published in *The Legal Intelligencer* and will be submitted to American Lawyer Media, Jenkins Memorial Law Library, and the Law Library for the First Judicial District.

*By the Court*

HONORABLE JACQUELINE F. ALLEN,  
*Administrative Judge, Trial Division*  
*Court of Common Pleas, Philadelphia County*

#### **PROPOSED NEW PHILADELPHIA CRIMINAL RULE**

#### **Rule 588. Motion for Return of Property. Post-Deprivation Hearing.**

(A) Any person aggrieved by a search and seizure may move for the return of the property seized by filing a motion with the Trial Division, Criminal regardless of whether criminal charges have been filed against the owner of the property or the person in possession of the property. The relief requested may be interim (i.e. return of the property pending disposition of the criminal case or the forfeiture petition), or permanent in nature.

(B) In the event criminal charges have been filed against the owner of the property or the person in possession of the property, the motion shall be filed utilizing the CPCMS number assigned to the underlying case. If criminal charges have not been filed against the owner or person in possession of the property, a Miscellaneous Docket number shall be assigned through CPCMS.

(C) The filer shall serve the Commonwealth through the District Attorney's Office, and shall file an Affidavit of Service.

(D) Upon receipt of the Affidavit of Service, the Office of Judicial Records shall schedule a prompt hearing on the motion and shall notify the Commonwealth and the filer.

(E) The assigned judge may require the filing of an Answer.

(F) In the event a forfeiture petition was filed by the Commonwealth before the filing of a motion for the return of property, the motion(s) shall be assigned to the same judge for disposition, as practicable.

[Pa.B. Doc. No. 16-1479. Filed for public inspection August 26, 2016, 9:00 a.m.]

## **Title 255—LOCAL COURT RULES**

### **BEDFORD COUNTY**

#### **Designation of a Central Location for Holding Preliminary Hearings in Court Cases; AD No. 3 for 2016**

#### **Order of Court**

*And Now*, this 4th day of August, 2016, because of the increase in criminal prosecution, involuntary detention after arrest, and the relatively large geographical area of this Judicial District, it is the opinion of this Court that the administration of justice may be more expeditiously accomplished by the establishment of a new central place within the Judicial District for the conduct of all preliminary hearings in court cases in which issuing Authorities of the various Magisterial District shall have jurisdiction.

*Wherefore*, it is the Order of the Court that, effective October 19, 2016, and continuing until further Order of Court, Courtroom Number 3 of the Bedford County Courthouse/Office Building, 200 South Juliana Street, Bedford, Pennsylvania, is hereby designated as the place for the conduct of all preliminary hearings within the 57th Judicial District of Pennsylvania, the same to be known as the "Central Court of Bedford County."

Court cases requiring a preliminary hearing shall be transferred forthwith as they are filed by the respective issuing Authorities to Magisterial District 57-3-04 in the West Providence Township Building, 500 State Street, Everett, Pennsylvania, to be brought by staff to "Central Court" Wednesday for further processing.

The "Central Court" shall convene for the holding of preliminary hearings at 9:00 o'clock a.m. on Wednesday of each week, unless such day shall be a legal holiday, in which event the regular session of "Central Court" for that week shall convene at 9:00 o'clock a.m. on the Thursday immediately following such holiday. Special sessions of said "Central Court" may be scheduled for other days of the week as the need arises.

This Court shall provide for the assignment of Magisterial District Justices to preside at said "Central Court", and also shall establish from time to time such procedures for the "Central Court" as the needs of justice and the efficient administration thereof may require.

The Magisterial District Justices, when assigned to preside at "Central Court", shall exercise all powers given to Magisterial District Justices by the laws of this Commonwealth and the Rules of Criminal Procedure promulgated by the Supreme Court of Pennsylvania.

The Court Administrator of this Court acting through the Central Court Manager shall exercise administrative control over the operation of the "Central Court", and shall supervise and administer the operation of the same.

The Sheriff of Bedford County shall ensure at all times when court is in session that a Deputy will be stationed on the first and second floor hallways adjacent to Courtroom No. 3 to facilitate the flow of persons, to provide security, and to minimize disruptions to the rest of the Courthouse. The assigned Deputies shall ensure that those attending "Central Court" remain in the hallway areas of the "Central Court Room" except as necessary to use the restrooms and to transact other legitimate business.



All incarcerated persons, absent good reason to the contrary, shall be conducted to the courtroom by way of the outside portico.

Food, beverage, and smoking shall not be permitted in the "Central Court" hallways, or adjacent outside areas.

The Commonwealth, police officers, victims, witnesses, support personnel, and associated persons shall be situated on the second floor and may make use of the waiting area on that floor. Defense counsel, accused persons, witnesses, family, and associated persons shall be situated on the first floor and may make use of the spaces on that level. Defendants shall proceed to the second floor for hearings and waivers only. Attorneys, including prosecution and defense counsel, may pass freely between the floors. All others should remain on the level assigned except for good cause. Defendant's family and friends shall be permitted to attend the hearings if they so desire. The press and public are permitted to attend preliminary hearings. Photography, video, and recordings are barred except as allowed by law.

For security reasons, parking outside the first floor hallway exit will be restricted to County personnel.

*By the Court*

THOMAS S. LING,  
President Judge

[Pa.B. Doc. No. 16-1480. Filed for public inspection August 26, 2016, 9:00 a.m.]

## BUCKS COUNTY

### Protection From Abuse Actions; Administrative Order No. 19

#### Amended Administrative Order No. 19

*And Now*, this 8th day of August 2016, Administrative Order Number 22 is rescinded, and Administrative Order Number 19 is amended, in its entirety, as follows:

#### Statement of Policy

It is the purpose and policy of the Court of Common Pleas of Bucks County by this Administrative Order to implement and effectuate the Protection From Abuse Act and the Protection of Victims of Sexual Violence or Intimidation Act, to streamline and facilitate enforcement, and to eliminate procedural obstacles and limitations where substantial justice requires forthright action on the part of the police, the Magisterial District Judge and this Court.

In order to implement the Protection From Abuse Act, 23 Pa.C.S.A. § 6101, et seq., as amended, and the Protection of Victims of Sexual Violence or Intimidation Act, 42 Pa.C.S.A. § 62A01, et seq., as amended, the following policies, practices and procedures are hereby approved.

1. Actions for Protection From Abuse shall be commenced and prosecuted in accordance with the provisions of Pa.R.C.P. No. 1901, et seq. and 23 Pa.C.S.A. § 6101 et seq. Actions for Protection of Victims of Sexual Violence or Intimidation shall be commenced and prosecuted in accordance with the provisions of Pa.R.C.P. No. 1951, et seq., and 42 Pa.C.S.A. § 62A01, et seq.

2. Actions seeking emergency relief under the Protection From Abuse Act shall be commenced and prosecuted pursuant to the provisions of Pa.R.C.P.M.D.J. No. 1201 et seq. and 23 Pa.C.S.A. § 6110 et seq. Actions seeking emergency relief under the Protection of Victims of Sexual Violence or Intimidation Act shall be commenced and prosecuted in accordance with the provisions of Pa.R.C.P.M.D.J. No. 1201, et seq., and 42 Pa.C.S.A. § 62A09, et seq.

3. Emergency orders for protection pursuant to either the Protection From Abuse Act or Protection of Victims of Sexual Violence or Intimidation Act may be issued by a Magisterial District Judge at the following times:

(a) on Monday through Thursday, from 4 p.m. to 8 a.m. on the next day the Court of Common Pleas is open for business; and

(b) during weekend periods, from 12:00 p.m. on Friday (or otherwise, 12:00 p.m. on the last day of the week on which the Court of Common Pleas is open for business) to 8 a.m. on the next day the Court of Common Pleas is open for business.

4. If an emergency order of protection has issued pursuant to either the Protection From Abuse Act or Protection of Victims of Sexual Violence or Intimidation Act, the plaintiff and, if available, the defendant, shall be informed of the following:

(a) that the Magisterial District Judge's order will expire at the close of the next Court of Common Pleas business day, and that a further order may be issued only by the Court of Common Pleas;

(b) that a certification of the Magisterial District Judge's record will be made immediately to the Court of Common Pleas and will have the effect of commencing proceedings in the Court of Common Pleas;

(c) that the plaintiff must complete a petition or a verified statement setting forth either the abuse by the defendant, as required in 23 Pa.C.S.A. § 6110(c), or the violence or intimidation by the defendant, as required by 42 Pa.C.S.A. § 62A09(c), which shall accompany the certified emergency order forwarded to the Court of Common Pleas as a basis for the extension of the emergency order, if granted by the Court of Common Pleas, and also serve as a record for a hearing;

(d) that a hearing will be held in the Court of Common Pleas within the next ten business days; and

(e) that if plaintiff fails to appear at the hearing, the petition may be dismissed.

If practicable, notice of the time and place of the hearing shall be hand-delivered to the parties and each shall sign a receipt.

In cases in which defendant is not present, the defendant shall be served with the information contained in this paragraph and notice of the hearing in the same manner and at the same time as service of the order of protection under Pa.R.C.P.M.D.J. No. 1209.

5. Actions for contempt of an order for Protection From Abuse shall be commenced in accordance with 23 Pa.C.S.A. § 6113 et seq. and Pa.R.C.P. No. 1901.5 et seq. Actions for contempt of an order for Protection of Victims of Sexual Violence or Intimidation shall be commenced in accordance with 42 Pa.C.S.A. § 62A14 et seq. and Pa.R.C.P. No. 1955 et seq.



6. If a defendant is arrested for violation of an order of protection issued pursuant to either the Protection From Abuse Act or Protection of Victims of Sexual Violence or Intimidation Act by a Court of Common Pleas Judge, an emergency order issued by a Magisterial District Judge pursuant to such Acts, or a duly registered foreign protection order, the defendant forthwith shall be preliminarily arraigned before a Magisterial District Judge.

7. At the preliminary arraignment, a defendant arrested for violation of an order of protection issued pursuant to either the Protection From Abuse Act or Protection of Victims of Sexual Violence or Intimidation Act shall be notified of the following:

(a) that the defendant is charged with criminal contempt for violation of the order of protection;

(b) that a hearing will be held in the Court of Common Pleas within the next ten business days;

(c) that defendant is entitled to be represented by counsel, and, if defendant is unable to afford counsel, counsel will be appointed at no cost to defendant; and

(d) that if defendant fails to appear at the hearing, a bench warrant may be issued for defendant's arrest.

Bail shall be set to insure defendant's presence at the contempt hearing in accordance with Pa.R.Crim.P. No. 4004 including, without limitation, the condition that defendant not contact the plaintiff or members of the plaintiff's household, directly or indirectly, in the meantime.

Notice of the time and place of the hearing shall be hand-delivered to the parties and each shall sign a receipt. The office of the Magisterial District Judge shall notify an unrepresented plaintiff that a lawyer may be obtained from Legal Aid of Southeastern PA and/or the Bucks County Bar Association Lawyer Referral Service.

Plaintiffs shall also be provided contact information for A Woman's Place, a domestic violence center, NOVA (Network of Victim Assistance), or for any other local public or private domestic violence/sexual assault agencies approved by the Court of Common Pleas.

8. The office of the Magisterial District Judge shall cause the emergency order and petition, together with any other documentation and the receipts for notice of the hearing, to be forwarded immediately to the Office of the Prothonotary, Family Court Division.

9. The Office of the Prothonotary, Family Court Division, shall be responsible for notifying the Court Administrator's Office of all cases to be scheduled for hearings.

10. In all cases commenced under either the Protection From Abuse Act or Protection of Victims of Sexual Violence or Intimidation Act, neither the fact of the plaintiff's or victim's presence within the jurisdiction or district, nor any address, telephone number, or any other demographic information about the plaintiff or victim (to include in appropriate cases, any minor children of the plaintiff) shall be disclosed by the court, the court filing office, or any relevant law enforcement agencies, human service agencies, and school districts to any third party except by order of court.

This Administrative Order shall be effective thirty days from the date of publication in the *Pennsylvania Bulletin*.

*By the Court*

JEFFREY L. FINLEY,  
*President Judge*

[Pa.B. Doc. No. 16-1481. Filed for public inspection August 26, 2016, 9:00 a.m.]

## BUCKS COUNTY

### Rescission of Rule of Criminal Procedure 2002A\*(1) and Promulgation of Rule of Criminal Procedure 202; AD-1-2016

#### Order

*And Now*, this 8th day of August 2016, it is hereby *Ordered and Decreed* that Bucks County Rule of Criminal Procedure 2002A\*(1) is rescinded and Bucks County Rule of Criminal Procedure 202 is promulgated as follows:

#### Rule 202. Approval of Search Warrant Applications by Attorney for the Commonwealth.

The District Attorney of Bucks County having filed a certification pursuant to Pa.R.Crim.P. No. 202, no search warrant shall hereafter be issued by any judicial officer in Bucks County unless the search warrant application has the approval of an attorney for the Commonwealth prior to filing, except for applications for search warrants which request legal blood testing of any person related to investigations or prosecutions of offenses under 75 Pa.C.S.A. § 3802. In such cases only, law enforcement shall not be required to seek or obtain prior approval from an attorney for the Commonwealth.

This Rule shall be effective thirty days after publication in the *Pennsylvania Bulletin*.

*By the Court*

HONORABLE JEFFREY L. FINLEY,  
*President Judge*

[Pa.B. Doc. No. 16-1482. Filed for public inspection August 26, 2016, 9:00 a.m.]

## WASHINGTON COUNTY

### Amendment to Local Civil Rule L-5000; No. 2016-1

#### Order

*And Now*, this 10th day of August, 2016; *It Is Hereby Ordered* that Local Civil Rule L-5000 (Definitions) of the Assessment Appeals be amended as follows:

#### Definitions:

*Appeal*—An appeal from the Washington County Board of Assessment Appeals as defined in the Consolidated County Assessment Law, 53 Pa.Cons.Stat. § 8854.

*Board*—The Washington County Board of Assessment Appeals.

*Commercial Property*—Any property whose purpose is to generate income for its owner, or is otherwise designated in the tax assessment records as commercial in use.

*Date of Notification*—The date of the Board's decision.

*Party*—Appellant, the Board, and any other person or entity entitled to notice of the appeal.

*Property Owner*—The record owner of the property as set forth in the tax assessment records.

*Taxing Authority*—Any county, city, borough, town, township, school district, or other public corporation having power and authority to levy taxes on the assessment of the real estate in question.

*Verified*—When used in reference to a written statement of fact by the signer, means supported by oath or

affirmation or made subject to the penalties of 18 Pa.Con.Stat. § 4904 relating to unsworn falsification to authorities.

These rules will become effective thirty days after publication in the *Pennsylvania Bulletin*.

*By the Court*

KATHERINE B. EMERY,  
*President Judge*

[Pa.B. Doc. No. 16-1483. Filed for public inspection August 26, 2016, 9:00 a.m.]

## SUPREME COURT

### Duty Assignment Schedule for Emergency Petitions in the Year 2016; No. 452 Judicial Administration Doc.

#### Second Amended Order

*Per Curiam:*

*And Now*, this 11th day of August, 2016, it is hereby ordered that the amended order at No. 452 Judicial Administration Docket, amended March 24, 2016, listing emergency duty assignments is hereby amended as follows:

September	Justice Christine Donohue	(Eastern District)
	Justice Sallie Updyke Mundy	(Western District)
October	Justice Debra Todd	(Eastern District)
	Justice Kevin Dougherty	(Western District)
November	Justice Max Baer	(Eastern District)
	Justice David Wecht	(Western District)
December	Justice Christine Donohue	(Eastern District)
	Justice Sallie Updyke Mundy	(Western District)

[Pa.B. Doc. No. 16-1484. Filed for public inspection August 26, 2016, 9:00 a.m.]