

## ADDITIONS TO CASEFILEEXPRESS (CFX)

The following pleadings have been added to CaseFileXpress:

CODE	DESCRIPTION
PETRO	Petition to reopen (post 2005 ADM – current cases)
ACCF	Account filed in all case types (no supporting documentation)
FACF	Final account filed in all case types (no supporting documentation)
INVF	Inventory filed in ADM, GDN & TRP cases
INTCPIF	Inventory filed in INT cases

### General Instructions

All filers shall include contact information as the last page of the filing. The information must include:

- Contact person
- Phone number
- Email address
- Alternate Email Address
- Mailing address

### Filing Instructions for Accounts and Inventories

- Accounts and Inventories shall be e-filed via CaseFileXpress by attorneys serving as fiduciaries and as counsel of record on behalf of a fiduciary in all case types (except sealed cases), without backup audit documentation. Any costs due will be assessed and collected upon audit of the account. Selection of the appropriate e-filing code established by CaseFileXpress is required. E-Filing by counsel will become mandatory thirty (30) days from the date hereof.
- Because of privacy concerns, pursuant to Probate Rule 5.1, **Form 27** is **not** to be e-filed. Instead, Form 27 is to be emailed, at the time of e-filing an inventory or an account to [AuditingBranchCenter@dcsc.gov](mailto:AuditingBranchCenter@dcsc.gov) with proper identification by estate name and case number.
- For privacy reasons, pursuant to Probate Rule 5.1, **bank statements, vouchers and cancelled checks or other financial statements or documentation** (if fewer than 25 pages) may be emailed to [AuditingBranchCenter@dcsc.gov](mailto:AuditingBranchCenter@dcsc.gov) with proper identification by estate name and case number. Audit documentation exceeding 25 pages shall be mailed at the time of e-filing the

account with proper identification by estate name and case number to 515 5th Street, NW, Washington, DC 20001. **Attn: Duty Auditor.**

- In an Intervention case, a **Conservator's Plan** is e-filed together with the Inventory as one document attached to the **Inventory**.
- In an Intervention case, a **Conservator's Report** is e-filed together with the Account as one document attached to an **Interim Account**; and in a case in which a **Final Account** is e-filed due only to a ward's death, a **Petition to Terminate the Conservatorship** and the **Final Conservator's Report** are e-filed attached as one document to the **Final Account**.
- **Self-represented fiduciaries** may elect to e-file by registering with CaseFileXpress and follow the instructions outlined above, or may mail an Inventory together with Form 27, or an Account together with Form 27 and the required financial documentation needed for audit to: D.C. Superior Court Probate Division, 515 5th Street, NW, Washington, DC 20001. **Attn: Duty Auditor.\***
- Accounts and Inventories **CANNOT** be emailed [to AuditingBranchCenter@dcsc.gov](mailto:to AuditingBranchCenter@dcsc.gov) or any other email address by any party.

## **Filing Instructions for Petitions to Re-Open Estates**

- Petitions to Re-Open Estate (Petition for Probate-Re-Open) shall be e-filed via CaseFileXpress by attorneys serving as personal representatives and as counsel of record on behalf of personal representatives in large decedent estates post 2005 date of death of decedent (except sealed cases). Selection of the appropriate e-filing code set forth by CaseFileXpress is required.
- If bond is required, copies of executed and sealed bonds must be emailed to the Probate Division directly from the bond company. Please indicate whether bond is required on petition and you will be contacted and provided instructions for filing bond.
- Costs may be assessed and collected upon review of the petition.
- **Self-represented filers** may elect to e-file by registering with CaseFileXpress and follow the instructions outlined above, or may mail a Petition to Re-Open (with completed bond or waivers, if applicable) to: D.C. Superior Court Probate Division, 515 5th Street, NW, Washington, DC 20001. **Attn: Legal Branch\***

**\*NOTICE:** Because Division employees are currently working remotely, there will be a significant delay in processing filings made by USPS mail.