



Delaware County Virtual Probate Process

1. **ATTORNEY REPRESENTATION REQUIRED:** Clients seeking virtual probate must be represented by an attorney. Currently, there is no virtual probate available for pro se estates. We will not proceed unless the client is represented by an attorney and we cannot make exceptions. One reason for this requirement is so the attorney can assist the client in ensuring the correct documents are gathered and properly submitted using our online platform. Both the client and the attorney must be present during the virtual appointment.

2. **EMERGENCIES ONLY:** Virtual probate appointments should only be made for emergency situations that cannot wait until the office reopens. You and your attorney should exercise your best judgment in determining whether the circumstances cannot wait and proceed accordingly. Our office is operated on an extremely reduced staff and we are not positioned to offer individualized advice on every set of circumstances. Please use your best judgment.

3. **MICROSOFT TEAMS ONLY:** Attorney and clients (as well as any other necessary parties) must each be available by video-audio electronic means by way of Microsoft Teams only. Both the attorney and client must access and install Microsoft Teams on either computer or phone, establish accounts, and ensure that their audio and visual equipment is working—prior to the virtual probate appointment. The attorney and client need not be in the same physical location as the platform allows for multiple users to virtually conference at the same time. The office believes allowing all individuals to appear remotely is necessary to conform to the Governor’s directives. Per Delaware County’s IT Department, we cannot perform virtual probate proceedings on another platforms (including but not limited to Zoom) due to security risks. We anticipate some users will experience challenges familiarizing themselves with this platform. Unfortunately, we are not able to offer troubleshooting services due to our reduced staff. We strongly encourage users to utilize publicly available information and/or to contact Microsoft if they continue to have trouble using Microsoft Teams.

4. **EMAIL AND SUBMIT ONLINE ALL PROBATE DOCUMENTS:** The attorney is responsible for scheduling the video conference with the Register of Wills Office by emailing RossiJ@co.delaware.pa.us subject line Virtual Probate Request. Prior to receiving an appointment slot, the attorney shall submit the below documents via email to RossiJ@co.delaware.pa.us and complete the form on the Register of Wills online portal. Please note that we cannot accommodate the personal schedules of all individuals. If there is a particular day that does not work for an individual necessary for

your virtual probate appointment, you may share that information. Please understand that the more scheduling constraints you have, the longer it will take for us to schedule a virtual probate appointment. You should endeavor to make yourselves as available as possible. Here is a list of the documents to be submitted via email to RossiJ@co.delaware.pa.us.

- a. PDF Copy of the decedent's Will when one exists
- b. PDF Copy of Death Certificate
- c. PDF Photo ID of those taking oaths
- d. PDF copy of the Petition for Probate,
- e. PDF Copy of the Driver's License and/or Photo ID of the Personal Representative(s).
- f. PDF Codicils and any other necessary corresponding documents (such as renunciations, witness affidavits etc.)

5. **YOU RECEIVE PETITION AND APPOINTMENT SLOT:** We will generate the Petition for Probate and email it over to you during the video conference, you will print it out. Do not sign the Petition yet. It will be signed during the virtual appointment. You will also receive a date and time for your appointment. You must be ready to go (signed in, etc.) at least ten (10) minutes in advance of your appointment. All individuals should have already verified their Microsoft Teams account and audio-visual equipment in advance. Please note that if you or any necessary individual's account malfunctions or equipment fails, you will have to reschedule your appointment. If you or any necessary individual is late, you will have to reschedule your appointment. If you need to cancel your appointment, please call 610-891-4400 and follow the prompts.

6. **VIRTUAL APPOINTMENT:** We will go over the Petition for Probate with your client, a Deputy will administer the Oath, and the Personal Representative will sign the Petition for Probate on video with the Deputy observing. The Deputy must be able to see over video the personal representative and any witnesses actually sign the petition and oaths. No additional fee will be associated with this service during the course of the declared emergency. During the appointment, the Deputy will advise you of the probate fee, including short certificates. You will then mail in the ORIGINAL documents (the now-signed Probate Petition, the Original Will, Original Death Certificate, any other original corresponding documents and the check for the probate fee). We understand that we cannot require individuals (i.e., client and attorney) to be in the same physical

location during this emergency per the Governor's directives. If the documents need to arrive at our office from more than one location, that is acceptable.

7. AFTER THE VIRTUAL APPOINTMENT: After your appointment, all original documents (the signed petition, the will, and the death certificate, etc.) and check payment for Probate Fees shall be mailed to the Register's Office. Your check should be made out to *Register of Wills* and everything must be submitted via U.S. mail to the following address:

Delaware County Register of Wills Department
Attention: Virtual Probate
201 W. Front St
Media, Pa 19063

Upon receipt, after a full review of the physical documents, assuming all are in order, Letters, Shorts and associated documents will be issued and mailed to the attorney.