



Delaware County Probate Appointment Process

Last Updated July 30, 2020

1. REQUIREMENTS FOR VIRTUAL AND IN-PERSON

APPOINTMENTS: We are conducting virtual appointments over Microsoft Teams, a video-conference platform and limited, in-person appointments in the office. Please know that in-person appointments may be cancelled on short-notice due to unforeseen illness or changes in government restrictions. We strongly encourage use of virtual appointments.

- a. Virtual appointments: Individuals and their attorney(s), if they choose to use an attorney (as well as any other necessary parties) must have access to a printer and be available by video-audio electronic means by way of Microsoft Teams only. Teams is free and available at <https://www.microsoft.com/en-us/microsoft-365/microsoft-teams/group-chat-software>. All parties 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 parties need not be in the same physical location as Teams allows for multiple users to virtually conference at the same time, but many attorneys and clients choose to be in the same location and appear together on the same video. 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.
- b. In-Person Appointments: Please note that individuals who have an in-person appointment must always pass a temperature check before entry and wear a face mask covering nose and mouth. If you do not have a mask, one will be provided for you. If you cannot wear a mask, a face shield will be provided for you. If your in-person appointment cannot be held as planned due to unforeseen sickness or changed government restrictions, you will need to reschedule. We respectfully recommend that you arrive at the complex in advance of your scheduled appointment in case there are delays associated with entry. Because of the challenges with in-person appointments, we strongly encourage use of virtual appointments.

2. **SUBMIT ONLINE PRE-APPLICATION AND EMAIL ALL PROBATE DOCUMENTS:** There are two steps to getting scheduled for an appointment: (1) completing the online application and (2) emailing copies of all documents to be used during the appointment. The attorney or unrepresented individual is responsible for completing the online pre-application *and* scheduling the appointment in advance with the Register of Wills Office by emailing Probate@co.delaware.pa.us subject line Virtual Probate Appointment Request or In-Person Probate Appointment Request. *Note: sending all the documents as multiple attachments to one, single email will expedite your processing time and get you an appointment faster!*

The Online Pre-entry Probate Petition may be accessed here:
<https://www.delcopa.gov/row/online.html>.

Here is a list of the documents to be submitted via email to
Probate@co.delaware.pa.us:

- a. PDF Copy of the decedent's Will when one exists. *Please note that your must have the original Will to complete probate, as you must provide us the original after your appointment. If you do not have the original Will, we cannot simply probate the estate with a copy. If you do not have the original, you may require the services of an attorney.*
- b. PDF Copy of Death Certificate (if the decedent died in PA, see <https://www.health.pa.gov/topics/certificates/Pages/Death-Certificates.aspx>)
- c. PDF Copy of the Driver's License and/or Photo ID of the Personal Representative(s).
- d. PDF Copy of Photo ID(s) for any others taking oaths, if applicable
- e. PDF copy of the Petition for Probate (Petition for Grant of Letters), available at <https://www.delcopa.gov/row/pdf/file-822.pdf> (make sure you fill out the fields and save it prior to emailing)
- f. Other documents: PDF Copies of Codicils and any other necessary corresponding documents (such as renunciations, witness affidavits etc.). Forms are available at <https://delcopa.gov/row/forms.html>. If you are unsure of what you need, you may require the services of an attorney. If you need a referral, you may contact the Delaware County Bar Association at (610) 566-6625.

3. **YOU RECEIVE APPOINTMENT SLOT:** After our staff has reviewed your online pre-application and your emailed materials, we will schedule you for an appointment. Please understand that review may take more than one business day and that appointments are limited, especially in-person appointments. Appointment slots are

usually 30-minutes long. You must be ready to go (signed in, etc.) at least ten (10) minutes in advance of your virtual appointment or outside the door of the Register of Wills office for an in-person appointment (meaning already have gone through security and passed all temperature checks.

Note: For in-person appointments, you must always wear a face mask covering nose and mouth. If you do not have a mask or have a medical issue, a mask or face shield will be provided to you. If you need to cancel your appointment, please call 610-891-4400 and follow the prompts.

4. **YOUR APPOINTMENT:** We will go over the Petition, a Deputy will administer the Oath, and the Personal Representative will sign the Petition for Probate on video with the Deputy observing or in person in front of our staff. For virtual appointments, you must have access to a printer to print the completed materials, and the Deputy must be able to see over video the personal representative and any witnesses sign the petition and oaths. No additional fee will be associated with any virtual service during the declared emergency. During the appointment, the Deputy will advise you of the probate fee, including fees for short certificates.

5. **AFTER THE APPOINTMENT:** After your virtual 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 of Wills Office. You will mail in the ORIGINAL documents, NOT COPIES. If you send copies or forget one of your original documents, it will cause delay. Remember to mail:

- a. The decedent's original Will when one exists
- b. The Death Certificate
- c. The properly signed Petition for Probate (Petition for Grant of Letters), that you completed during your appointment
- d. Originals of ALL other documents, such as Codicils and any other necessary corresponding documents (such as renunciations, witness affidavits etc.).
- e. The Check made out to *Register of Wills* in the amount of the probate fee that you were advised of during your appointment
- f. A self-addressed, stamped envelope for receiving your Short Certificates and Letters

Our mailing address is:

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, original documents, assuming all are in order, Letters, Short Certificates, and associated documents will be issued and mailed.