

**ELECTRONIC SUBMISSION OF PROPOSED ORDERS
TO JUDGE ASSIGNED TO CHARLOTTE COUNTY
PROBATE DOCKET**

Procedures, Instructions, Forms, and Common Problems
Version 4.0 - January 28, 2019

The vast majority of proposed orders in probate (estate) cases in Charlotte County must be submitted to the assigned judge electronically via E-mail in Microsoft® Word format. Among other things, this document details the general procedures for electronic submission of those proposed orders.

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LINKS TO CONTENTS AND ERROR CODES

If your submission has been rejected with a code:

- To Find error codes beginning with "A", CLICK [HERE](#)**
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To Find error codes beginning with "F", CLICK [HERE](#)

A - PROCEDURES

[BRIEF SUMMARY OF GENERAL RULES FOR ELECTRONIC SUBMISSION OF PROPOSED ORDERS](#)

1. **VERY IMPORTANT:** Before sending to the Court proposed orders electronically that will require the Court's review of supporting documents before entering the orders insure that all the required supporting documents are viewable on the Clerk's website. **DO NOT SEND THE PROPOSED ORDER UNTIL ALL NECESSARY SUPPORTING DOCUMENT(S) ARE VIEWABLE ON THE CLERK'S SITE. IT MAY TAKE A DAY OR MORE FOR A RECENTLY E-FILED DOCUMENT TO BE MADE VIEWABLE BY THE CLERK.**

2. **CHECKLISTS REQUIRED:**

Completed checklists must be submitted for nearly all proposed orders. If a checklist exists for the proposed order type, it must be submitted in an E-mail along with the proposed order. Links to all checklists may be found on the Court's homepage found here:

<https://www.ca.cjis20.org/home/charlotte/checklists.asp?list=probate>

3. **E-MAIL PROPOSED ORDERS:** All guardianship proposed orders, and nearly all probate/estate proposed orders or other document that requires the Court's signature should be sent directly via E-mail to the designated probate E-mail address specified below. *Do not route the E-mail with attached proposed order to the E-Filing Portal or to the Clerk.*

Probate (Estate) Cases: cha-probate@ca.cjis20.org

ATTACH ONLY ONE PROPOSED ORDER TO EACH E-MAIL: *Two proposed orders may not be attached to the same E-mail.* If there is a checklist for the proposed order, *only the corresponding checklist may also be attached* to the E-mail containing the related proposed order.

4. **SETTING ALL PROBATE (ESTATE) HEARINGS:** Please contact the Court's Judicial Assistant Jessica Gibbs by E-mail to jgibbs@ca.cjis20.org . E-mail is the much preferred method of communication. It is the attorney's/party's responsibility to schedule time for a hearing and to properly notice the trial, petition or motion for hearing.
5. **PROBATING A WILL AND COMMISSIONS:** In probate/estate cases do not send to the Court the few original documents that must be filed with the Clerk to the Court. Instead, send them directly to the Clerk for deposit in the will depository file (WD) (e.g., wills and codicils). Before asking the Court to sign an order that requires that the Judge view a will, make certain that the will is viewable on the Clerk's website. This may require that the attorney's office contact the probate clerk to request that a will previously deposited in the "WD" (will deposit) file be transferred from the will

deposit file to the probate file. This is the attorney's responsibility. Only a proposed Order Appointing Commissioner and the Commission with attached true copy of the will on file with the Clerk should be sent directly to the Court for signature. Upon receipt, the Court will sign the Order Appointing Commissioner and file it with the Clerk. The Court will sign the Commission with attached will and return it to the attorney for submission to the Commissioner. Upon receipt of the duly executed sworn oath of the witness(es) and attached will, the petitioner's counsel should E-file both in the conventional manner.

B - PROCEDURES

ELECTRONIC SUBMISSION OF PROPOSED ORDERS **(DETAILED INSTRUCTIONS)**

1. Electronic Submission of Probate Proposed Orders The procedures contained herein replace all previous versions of rules for submission of proposed orders for the judge assigned to <http://www.ca.cjis20.org/pdf/Charlotte/> the probate/guardianship docket in Charlotte County, Florida.

2. Document Format All electronically submitted proposed orders MUST be submitted to the Court utilizing recent versions of Microsoft Word. No other formats will be accepted at this time (except for checklists noted below). "Recent versions of Word" include all versions from 2003 and later with a "docx" file type. "RTF" files are not acceptable, and if your office uses WordPerfect, you can convert the WP files to Word files, but if your WP program has not been upgraded for many years, the version of Word that is produced may not be compatible with the judicial software that must process the proposed order.

3. Form/Template Modifications All proposed orders MUST be stripped of the following information at the bottom/end of document:

- Any reference to the date (You may retain the language "Ordered and Adjudged.")
- Judge Signature Line and Judge's Name
- Certificate of Service

An example has been attached which shows the text that should be removed from proposed orders at the end of the order in red strikethrough text. The judicial software will insert the judge's signature electronically with a date/time stamp included in the signature as well as the electronic certificate of service downloaded from the E-Filing Portal at the time the judicial software is processing the order. The Judicial Assistant will have

to manually add the certificate of service for recipients who will not be served by E-Service from the Portal.

Included below is a procedure that must be used to insure that your electronically submitted proposed orders do not generate electronic service language in fonts other than Times New Roman. We have seen a few examples of Word documents generating non-standard fonts when the electronic service list is imported and then inserted into the proposed order(s). This is due to the presence in your forms of non-standard fonts that appear when the service list is generated. This is not due to errors from the Portal or the judicial software. Please use the procedure at the end of this document to correct any errors that may occur. Look for **“INSTRUCTION FOR MODIFYING MICROSOFT WORD DOCUMENTS TO REMOVE EXTRANEEOUS FONTS”**.

4. Checklists Required

Completed checklists are required to be submitted for all proposed orders for which there is a checklist available on the Court’s website. Links to all checklists may be found on the Court's homepage found here:

<https://www.ca.cjis20.org/home/charlotte/checklists.asp?list=probate>

under the heading for the applicable case type.

If a checklist is available for a particular proposed order it must be included as an attachment to the E-mail containing the related proposed order. The checklist may be hand written and scanned into either a PDF document or inserted into a Word document (other than the proposed order). If the checklist is generated electronically it may be attached to the E-mail as a PDF or Word document (other than the proposed order). The checklist should be identified as a checklist in its file name. The judicial assistant will import the checklist attachment into the judicial viewer and the Court will review it along with the proposed order(s). The checklist(s) will be discarded after review and will not be E-filed. Word format is not critical for checklists because the checklist is not going to be edited and/or E-Signed. ***This is the only instance when more than one document may be attached to a single E-mail.***

5. Checklist Docket# and Item#

At this time the Court is suspending the requirement that the docket number and item number of the supporting document be included in the checklist. However, the date of filing of the supporting document should be included.

6. Clerks Pending Queue - Documents Must Be Viewable

The Clerks are permitted a period of time within which to make viewable documents that the Clerk has received from the E-filing Portal. The Court is aware of reports around the State that some Clerks may take days or a week or more to make certain documents viewable. In Charlotte County our Clerk has been very efficient in processing E-filed documents, but on occasion, there may be a delay or more than one or two days. Since many documents must be viewed by the Court and its staff prior to E-signing and E-filing proposed orders, it is necessary for the attorney's staff to wait until all necessary supporting documents are viewable on the Clerk's website prior to submitting related proposed orders to the Court. It has been the Court's practice to review and, if possible, E-sign and E-file proposed orders within a day or two of their receipt. If the supporting documents are unviewable when the proposed order is reviewed by the Court the Court will place the proposed order into a holding file which may result additional delay. *It is a much better and more time efficient practice for the attorney to withhold sending the proposed order to the Court until the supporting documents are viewable.*

A FEW EXAMPLES OF PROPOSED ORDERS WHOSE SUBMISSION MUST BE DELAYED:

Proposed Order	Document
Order Admitting Will	Will
Order Approving Accounting	
P.R.'s Letters when bond is required	Order appointing P.R. and Clerk's approval of bond

When bond is not clearly waved either by the will or by the heirs the Letters *should not be submitted* to the Court until after either the Court has appointed the P.R. with a waiver or the Clerk has accepted and approved the bond of the P.R.

7. Depositing Wills and Clerk Making Will Viewable

If the Clerk has not already made the will viewable, attorneys must notify the Clerk to scan a deposited will and make it viewable in in the newly filed probate case prior to the attorney submitting to the Court orders appointing the P.R. and Letters. *It is the Petitioner's responsibility to insure that the will is viewable by the time the Order of Appointment of P.R. and*

Letters are submitted electronically to the Court.

8. Pro Se Litigants and Unrepresented Interested Parties - Designation of Primary E-mail Address

Counsel are encouraged to request that *pro se* litigants and unrepresented interested parties who must be served with the orders agree to receive their copies by E-Service via the E-Filing Portal. "The court may serve any order or judgment by E-mail to all attorneys who have not been excused from E-mail service and to all parties not represented by an attorney who have designated an E-mail address for service." Rule 2.516(h)(1), Fla.R.Jud.P. Reducing the number of mailed hard copies that must be physically served will save time and money for law firms and the court.

The procedure for serving by Portal E-Service parties not represented by an attorney is set forth in Rule 2.516(b)(1)(C), Fla.R.Jud.P. which provides "any party not represented by an attorney may serve a designation of a primary E-mail address and also may designate no more than two secondary E-mail addresses to which service must be directed in that proceeding by the means provided in subdivision (b)(1) of this rule. If a party not represented by an attorney does not designate an E-mail address for service in a proceeding, service on and by that party must be by the means provided in subdivision (b)(2) of this rule."

There does not appear to be any prohibition against an attorney contacting an unrepresented party or interested person and requesting that they sign the designation of E-mail address described above. It is considered a best practice for the attorney to do so in writing, quoting the rule, and advising the person that receipt of service by E-mail is not mandatory, but is encouraged by the Court. There are instructions on www.flcourts.org for designation of a current E-mail address. The following link provides both instructions and an approved form for use in *family law cases*, but the form may be adopted for use in other divisions as well, including probate/guardianship. Note that the form requires that the unrepresented party or interested person sign the document under oath before a notary. *Attorneys are authorized to advise pro se litigants that the Court requests that they agree to Portal E-Service, but that they are not required to do so.* <http://www.flcourts.org/core/fileparse.php/533/urlt/915.pdf>

9. Pro Se Litigants and Unrepresented Interested Parties - No Designation E-mail

In cases where an unrepresented party or interested person has not designated an E-mail address pursuant to the Rule, the Court will print copies of signed orders and mail them. Stamped addressed envelopes must be furnished by the attorney who submitted

Address

the proposed order. In these cases, the electronic submission of the proposed order should contain a reference in the subject line of the E-mail to envelopes submitted such as "17456CP Estate of John Doe (envelopes submitted)". When the J.A. sees this reference in the subject line she will wait until the envelopes are received before she processes the submitted order and submits it to the Court for electronic signature and E-Filing. In addition, since the judicial software will not be retrieving service information from the Portal for these *pro se* individuals, it will be necessary for the

J. A. to manually add to the proposed order the name and address of the unrepresented party or interested person to the certificate of service. To assist in this process, the attorney's office must include the name and address of those persons to be served by mail in the body of the E-mail submitting the proposed order. It is expected that the judicial assistant will be able to simply cut and paste this text into the proposed order, a relatively easy and quick operation.

Alternatively, the attorney submitting the proposed order via E-mail may choose to send a hard copy of the signed order via U.S. Mail to the party or interested person after it is E-filed by the Court.

10. Preserve Existing Forms

It is recommended that for now attorneys preserve their forms/ templates for creating form orders for hard copy submission as they have been submitted in the past. It is recommended that you create new versions of your older forms/templates that are modified as outlined above for E-Filing only. In the event that there is a computer outage at any of the several transmission nodes or networks that must be working in order for this process to work, you will retain the option to return to the previous practice of paper submission and continue functioning.

11. Where to Send E-mails

All documents should be submitted via E-mail to cha-probate@ca.cjis20.org. ***Each order should be sent as a separate attachment with only one E-mail per order.*** Submittals not sent to either of these mail boxes will not be processed. Failure to send E-mails to the correct E-mail address will result in a failure to issue the proposed order(s). ***It is requested that no more than one proposed order be attached per E-mail.*** If there is a checklist it may be attached to E-mail to which the related proposed order is attached.

- 12. Commission with Copy of Will, Oath of Witness and Cert. of Commissioner** Send these documents in hard copy to the Court via U.S. mail or delivery to Justice Center Box. They will be returned via U.S. mail in a stamped envelope that must be provided by requesting counsel. A true copy of the will that is on file with the Clerk should be attached to the Commission and remain attached until it is received back from the Commissioner and filed with the Clerk.
- 13. Delay In Issuing Letters** When the issuance of letters of administration must be delayed until a bond is submitted and approved by the Clerk, the J.A. will hold the attachment containing the letters file in a pending queue until such time as the bond is accepted by the Clerk. The same procedure will be followed with guardianship cases involving the posting of a bond.
- 14. Subject Line of E-mails** E-mails sent must contain *at a minimum* the following language within subject line using the following format:
- 15. Standard Nomenclature** *Example (for Probate Cases):*
- 17456CP Estate of John Doe
- 16. Unrepresented Litigant(s) or Interested Persons Nomenclature** In case of unrepresented litigants or interested parties who have not designated an e-mail address for service pursuant to Rule Rule 2.516(h)(1), Fla.R.Jud.P.:
- Example 3 (pro se litigant - no designated e-mail address):*
- 17456CP Estate of John Doe (envelopes submitted)
- 17. Pre & Post 2017 Cases** Please remember for all cases filed prior to 2017 the case type suffix will always be CP for both estate and guardianship cases.
- 18. Cover Letters** Please do not attach a cover letter to the e-mail. Feel free to add the information normally placed in the cover letter into the body of the E-mail containing the attached proposed order. When envelopes are submitted due to *pro se* parties or litigants without designated E-mail address include a hard copy of the E-mail with the envelope. In addition, include in the body of the E-mail the name and mailing addresses of *pro se* parties and litigants who have not designated E-mail addresses.
- 19. Copy Opposing Counsel With the E-mail** As with hard copy cover letters, copy opposing counsel with the E-mail and *pro se* parties/interested persons who must be served

and who have designated an E-mail address (or by U.S. mail if there is no designated E-mail address). If no mention is made of possible alternative proposed orders the Court will assume that the other side has acquiesced in the form of the proposed order.

20. Competing Proposed Orders

If you are aware that opposing counsel will be submitting a competing proposed order or that the other side objects to the form of the proposed order, copy the other party with the E-mail and make reference in the body of the E-mail to the possibility that a competing proposed order will be submitted or describe the nature of the objection to the proposed order.

21. Whom to Contact With Questions

Clerk's Office Civil Courts Manager Marie Hicks will respond to questions regarding the Clerk's E-filing processes at marie.hicks@charlotteclerk.com

Questions regarding Judge Mason's procedures will be answered by Judge Mason's Judicial Assistant, Jessica, at jgibbs@ca.cjis20.org. Again, E-mail is the much preferred method of communication.

C - FORM

DESIGNATION OF PRIMARY ADDRESS FOR SERVICE OF PAPERS

APPROVED FORM FOR DESIGNATION OF PRIMARY ADDRESS FOR SERVICE OF PAPERS

IN THE CIRCUIT COURT OF THE
TWENTIETH JUDICIAL CIRCUIT
IN AND FOR CHARLOTTE COUNTY,
FLORIDA Division: _____

Case No.: _____

IN RE:
THE ESTATE/GUARDIANSHIP
OF:

_____,
Decedent/Ward
_____ /

DESIGNATION OF PRIMARY ADDRESS FOR SERVICE OF PAPERS

Instructions: A party not represented by an attorney may choose to designate E-mail address(es) for service. A primary and up to two secondary E-mail addresses can be designated. If you do so and the other party is represented by an attorney or has also designated E-mail address(es) for service, E-mail will be the exclusive means of service.

(Choose One)

1. E-mail Designation:

I, (full legal name) _____, being sworn,
certify

that my current E-mail address is _____@_____.

I hereby designate my E-mail address for receipt of all future papers in this proceeding. I understand that in the future I may change my address if I wish to be served at a physical location by filing an amended designation of primary address for service of papers form.

or

2. Physical Mail Designation:

I, (full legal name) _____, being sworn, certify that my current physical mailing address is:

(Street) _____,

(City) _____, (State) _____,

(Zip) _____ (Telephone Number) _____ (Fax) _____

I understand that I must keep the clerk’s office and the opposing party or parties notified of my current address and that all future papers in this proceeding will be served at the address(es) on record at the clerk’s office.

My Signature

Date

STATE: _____

COUNTY: _____

Sworn to or affirmed and signed before me on (Date) _____ by _____

NOTARY PUBLIC OR DEPUTY CLERK

(Print, type, or stamp commissioned name of notary or clerk.)

_____ Personally known

_____ Produced Identification. Type produced: _____

Certificate of Service

I certify that a copy of this document was _____ E-Mailed _____ Mailed _____ Faxed _____ Hand Delivered to the person(s) listed below on (date) _____.

Other party or his/her attorney:

Name: _____ Address: _____

City, State, Zip: _____ Fax Number: _____

Designated E-mail Address(es): _____

Other party or his/her attorney:

Name: _____

Address: _____

City, State, Zip: _____ Fax Number: _____

Designated E-mail Address(es): _____

My Signature

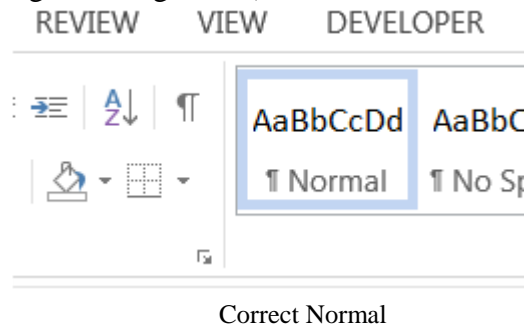
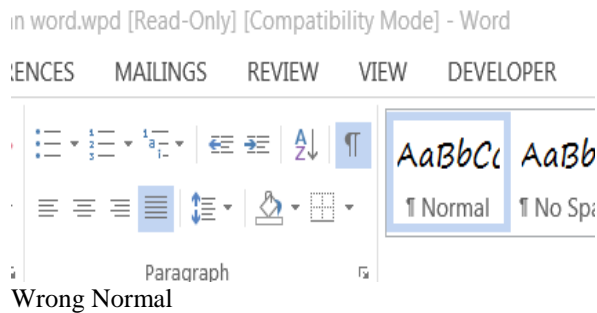
Date

D - INSTRUCTIONS

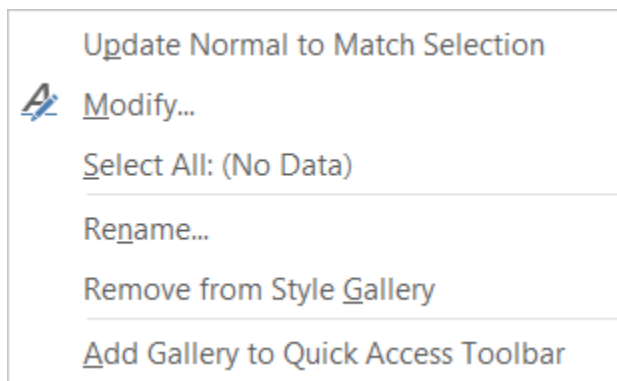
MODIFYING MICROSOFT WORD DOCUMENTS TO REMOVE EXTRANEIOUS FONTS

INSTRUCTIONS FOR MODIFYING MICROSOFT WORD DOCUMENTS TO REMOVE EXTRANEIOUS FONTS:

1. Open document in Microsoft Word. Up at the top of your document, you will see all your formatting choices. Look to the right, and you will see your “quick presets” of formatting choices. (Ex: Normal, No Spacing, Heading 1, etc.)

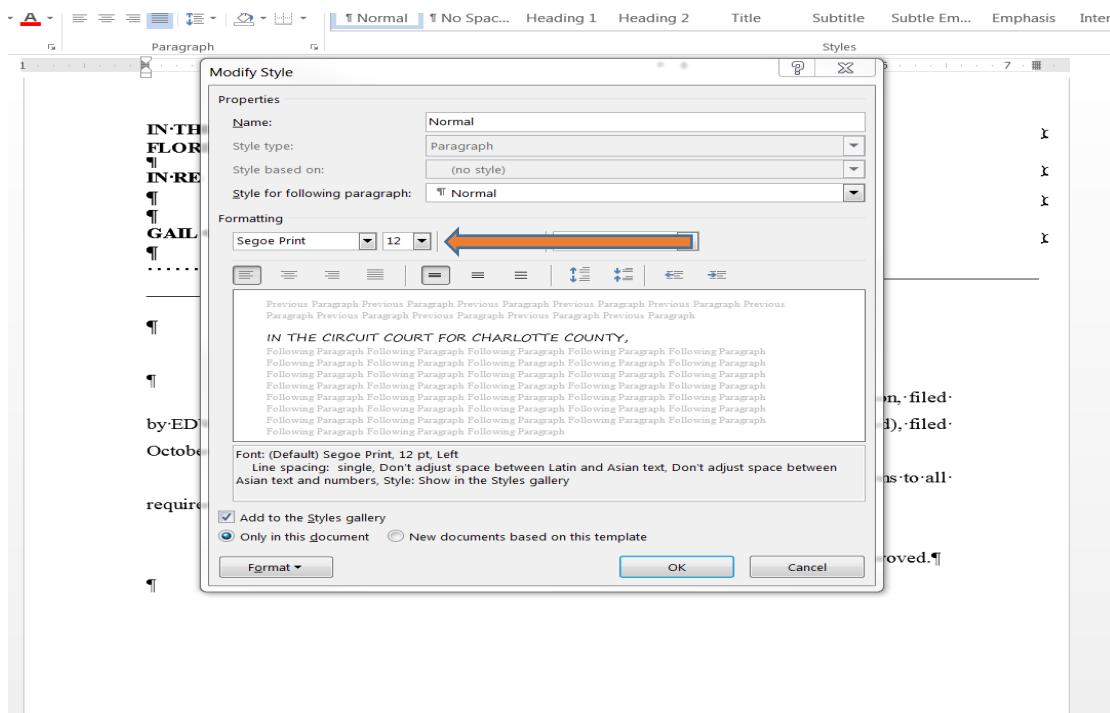


2. Right Click on Normal. The Sub menu will appear. Choose “Modify”



3. Once you choose “Modify”, a screen will appear. (Proceed to Step 4.)

4. Check under the formatting section. It SHOULD have TIMES NEW ROMAN, 12 pt. If it says that, then close and continue on. If it does not say that, then click the drop down and change it to that.



5. This will update for all your FUTURE documents. However, this will not automatically change your current one. To do so, simply hold Control (CTRL) and A down together. Then click the font drop down and make sure you select “Times New Roman”. Once you’ve done that, proceed to send document.

COMMON PROBLEMS FOR PROBATE AND GUARDIANSHIP CASES

The following lists are taken from the templates used by the Court to notify attorneys of issues that commonly arise. These lists are not the checklists that must be E-filed by the attorneys. If your submission is deficient in some fashion, you may receive an E-mail from the Court’s Judicial Assistant advising you of the specific deficiency set forth below.

E - COMMON PROBLEMS PROBATE (ESTATE) CASES

General Admonition: Do not submit proposed orders unless/until ALL the documents upon which the order is based are viewable in the clerk's system.

P1 Required completed checklist not submitted (go to:
<http://www.ca.cjis20.org/home/charlotte/charChecklist.asp>)

- P2 Decedent's death certificate is not filed.
- P3 Personal Representative named in will or codicil is not included in the proposed Order.
- P4 Assets are not adequately described.
- P5 Will has not been imaged and/or is not viewable in the clerk's electronic file.
- P6 No Statement Regarding Creditors filed
- P7 Failing to file Inventories with the Department of Revenue. Any inventory filed by a fiduciary in an estate proceeding with the Court, must be sent to the Department of Revenue at: Florida Department of Revenue, General Tax Administration Center, Tallahassee Central Service Center, P.O. Box 6417, Tallahassee, Florida 32314-6417
- P8 No proof of service of Notice to Creditors served on AHCA. §733.2121(d), F.S. provides: "If a decedent at the time of death was 55 years of age or older, the personal representative shall promptly serve a copy of the notice to creditors and provide a copy of the death certificate on the Agency for Health Care Administration within 3 months after the first publication of the notice to creditors, unless the agency has already filed a statement of claim in the estate proceedings." The website for the Florida Estate Recovery Program specifies the following address for notices: [Florida Medicaid Estate Recovery Program, P.O. Box 12188, Tallahassee, FL 32317.](#)
- P9 Will is not self-proved pursuant to F.S. 732.503. Procedure in F.S. 733.201(2) or (3) should be followed. The affidavits submitted do not comply with the requirements of Chapter 733.201(2), F.S.
- P10 Missing affidavit of no estate taxes due or a missing federal tax closing letter.
- P11 Missing or deficient verified petition setting forth the reasons for the sale of real property, a description of the real property sold or proposed to be sold, or the price or terms of the sale. Rule 5.370, Fla. Prob. R.
- P12 Insufficient or missing statement under oath establishing that the attesting witnesses cannot be found or that they have become incapacitated after the execution of the will or their testimony cannot be obtained within a reasonable time. §733.201(3), F.S.
- P13 Order cannot be entered without proper notice to interested parties or without scheduling the appropriate hearing.
- P14 The supporting petition/motion does not set forth sufficient allegations on which the court can grant the requested relief.
- P15 Unless a stipulation signed by all parties is filed, a hearing is required. Please contact the Court's Judicial Assistant at jgibbs@ca.cjis20.org. It is your responsibility to schedule sufficient time for a hearing and to properly notice the petition/motion for hearing.
- P16 Omitting the attorney's Florida Bar Number
- P17 Omitting the date of death on Petition for Administration
- P18 Omitting consents from both parents if they are not petitioning to be appointed guardian(s) in minor guardianships
- P19 Requesting to waive the investigatory cost in cases where the ward is indigent (the investigatory cost is to be borne by the guardian)
- P20 Incorrect filing fees
- P21 Omission of attorney or personal representative's signature on pleadings

- P22 Filing the incorrect proposed orders for entry by the Court
- P23 Submitting paperwork with the incorrect case numbers
- P24 Failing to redact all but the last four digits of social security numbers on pleadings or papers to be contained in the publicly available file.
- P25 Failure to submit a copy of the relevant foreign law (if in order to probate the will the Court must find that the will is valid under the laws of the state or country where the testator was at the time of execution.

Note in contested cases all pleadings and other matters to be considered by the Court must be electronically filed with the clerk with notice to interested persons. Accordingly, any response in a contested case should be made by a properly filed pleading and not by *ex parte* correspondence to the Court.

G – POWERPOINT ELECTRONIC SUBMISSION OF PROPOSED ORDERS



The E-Filing Procedure and Process for Guardianship/Probate

Points of Interest

- Document Format
- Form/Template Modifications
- Pro Se's and Unrepresented Interested Parties – Designation of Email vs. No Designation of Email
- Form Retention
- E Doc Submission
- Types of Nomenclature
- What happens if done wrong?
- What should my email look like?
- What should I be getting if done correctly?
- Tips and Exceptions

Document Format

Formats accepted:



-Word 97-2002 document (.doc)

-Word 2003-present document (.docx)

*Please note no other document format is acceptable at this time (e.g., PDFs, RTF's, WPD's, etc) are not acceptable and must be converted by attorney to word docs before sending to JA/Judge

Form/Template Modifications

CHARLOTTE COUNTY CLERK OF CIRCUIT COURT OR BOOK: 4173, PGS: 385, PAGE: 1 OF 1
INSTR # 2064088 Doc Type: PRO, Recorded: 3/3/2017 at 8:38 AM
Rec. Fee: RECORDED Cashier By: VERONICA T

IN THE CIRCUIT COURT OF THE TWENTIETH JUDICIAL CIRCUIT IN AND FOR
CHARLOTTE COUNTY, FLORIDA PROBATE DIVISION

IN RE: THE ESTATE OF: [REDACTED] File No. [REDACTED]
Deceased.

ORDER OF DISCHARGE
(single personal representative)

ON THE PETITION for Discharge of [REDACTED]
as Personal Representative of the estate of [REDACTED] deceased,
the Court finding that the estate has been fully administered and properly distributed, that claims
of creditors have been paid or otherwise disposed of, that the tax imposed by Chapter 198 of the
Florida Statutes, if any, has been paid, and that the Personal Representative should be
discharged, it is therefore

ORDERED AND ADJUDGED that the Personal Representative is discharged
and the surety on the ~~Personal Representative's bond, if any, is released from further liability.~~

DONE AND ORDERED in Chambers at the Charlotte County Justice Center in
the City of Punta Gorda and State of Florida on this 28th day of February, 2017.

[REDACTED]
ACTING CIRCUIT COURT JUDGE

cc: [REDACTED] 3/1/17 (2)

What it
looked like
before

Notice the done
and ordered date

Notice the
signature line

Note the cc: or
service list area

Form/Template Modification

IN THE CIRCUIT COURT OF THE TWENTIETH JUDICIAL CIRCUIT IN AND FOR
CHARLOTTE COUNTY, FLORIDA PROBATE DIVISION

IN RE: GUARDIANSHIP OF

File No. [REDACTED]

The Ward, [REDACTED]

Division: Guardianship

ORDER APPROVING ANNUAL GUARDIANSHIP PLAN OF GUARDIAN OF THE PERSON

The Court has reviewed the Annual Guardianship Plan filed by [REDACTED] as guardian of the person of [REDACTED] (the Ward), on October 31, 2017, and the Clerk's report thereon filed December 11, 2017. The Court finds the Guardianship Plan

- (a) Meets the needs of the Ward.
- (b) Authorizes the guardian to act only in areas in which the Ward has been declared incapacitated.
- (c) Confirms to all other requirements of the Florida Guardianship Law; and
- (d) Does not seek or provide for additional authority to be delegated to the guardian which has not heretofore been granted after a hearing, as provided for in Section 744.331 of the Florida Guardianship Law.

It therefore is

ADJUDGED that the Annual Guardianship Plan is approved and constitutes the authority for the guardian to act in the forthcoming year, and the guardian's powers are limited as set forth therein.

What it should look like now:

- No Done and Ordered paragraph
- No signature line
- No cc: or Service List Area

WHAT FORM WILL LOOK LIKE ONCE DONE

IN THE CIRCUIT COURT OF THE TWENTIETH JUDICIAL CIRCUIT IN AND FOR
CHARLOTTE COUNTY, FLORIDA PROBATE DIVISION

IN RE: GUARDIANSHIP OF

CASE NO. [REDACTED]

WARD [REDACTED]

ORDER APPROVING ANNUAL GUARDIANSHIP PLAN OF GUARDIAN OF THE PERSON

The Court has reviewed the Annual Guardianship Plan filed by Michael White, as guardian of [REDACTED] the Ward, on 11/10/2017, and the Clerk's report thereon filed 11/08/2017. The Court finds the Annual Guardianship Plan for the 2017-2018 plan year:

- (a) Meets the needs of the Ward.
- (b) Authorizes the guardian to act only in areas in which the Ward has been declared incapacitated.
- (c) Confirms to all other requirements of the Florida Statutes; and
- (d) Does not seek or provide additional authority to be delegated to the guardian which has not heretofore been granted after a hearing, as provided in Florida Statutes Section 744.331.

It therefore is

ADJUDGED that the Annual Guardianship Plan is approved and constitutes the authority for the guardian to act in the forthcoming year, and the guardian's powers are limited as set forth therein.

11/07/2017 15:28:44

000000 [REDACTED]
eSigned by JUDGE PAUL ALESSANDRO on 11/07/2017 15:28:44-01V6PHZ

Electronic Service List

PRO SE'S AND UNREPRESENTED INTERESTED PARTIES

Designation of Emails

- Court strongly recommends that you encourage all parties who must be served to provide their email for the portal to serve them.
- Not mandatory for non-attorney parties/interested persons
- www.flcourts.org for instructions on how to register their email
- For further details, please refer to Submission of Electronic Orders document (see handout)

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PRO SE'S AND UNREPRESENTED INTERESTED PARTIES

Non-Designation of Emails

- No email designation? Court will print copies and mail.
- Attorneys who submit the proposed order must furnish stamped envelopes
- Attorney must submit name and address of all parties who must be served by USPS in body of email
- Reference line should include "Envelopes Submitted" (Ex: 17456CP Estate of John Doe (Envelopes Submitted))
- JA will manually add the party to the service list on the proposed order.
- For further detail, please refer to Submission of Electronic Orders (see handout)



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Form Retention

- Save your forms locally and keep previous format
- In the event that there are any computer issues, the previous format will be used

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E-Doc Submission

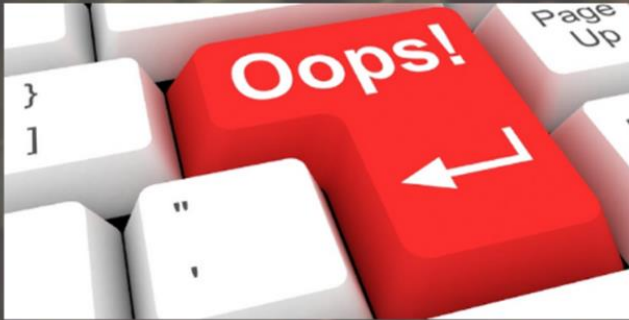
- Cha-probate@ca.cjis20.org
- Cha-guardianship@ca.cjis20.org
- Each order sent as separate attachment
- One order (and associated checklist) per email
- If checklist is being provided, please attach to correlating email (Checklists only can be in any format: .pdf, .wpd, etc).

Types of Nomenclature

- Standard
 - 17456GA Guardianship of John Doe
 - 2017 cases and later
 - 16456CP Guardianship of Jane Doe
 - For all pre 2017 cases
 - Unrepresented Litigants/Interested Persons
 - 17456CP Estate of John Doe (Envelopes Submitted)
 - 17456CP Estate of Jane Doe (Envelopes Submitted)
- For more nomenclature examples, please refer to Submission of electronic Orders document (See Handout)

What happens if done wrong?

- EMAILS sent to wrong address
 - Order may be delayed
 - Order may be missed completely



What happens if done wrong?

- Document not “modified” (i.e. “stripped”)
 - Will be rejected
- Wrong document format sent
 - Will be rejected



What should my email look like?

Send

To: cde-guardianship

Cc:

Bcc:

Subject: 14-23000 CP: Guardianship of JOHN DOE (documents viewable)

attached: Order Approving Annual Plan 17-18 Word.docx (13 KB) 201801045301915.pdf (61 KB) Use Adobe Send & Track Yes No

Enclosed please find our proposed Order Approving the Annual Plan. Please have Judge Alessandrini review the proposed Order, and if appropriate, we ask that he execute the Order. Should you have any questions, please feel free to call our office. Thank you for your assistance in this regard.

Thank you,

Mary Sue, Esq.
ABC Law Firm
123 Anywhere Street
Youtown, FL 33952

What you should be getting once order is processed

From: eservice@myflcourts.com
Subject: SERVICE OF COURT DOCUMENT - CASE NUMBER 08-XXXXXXXXXX
Date: Friday, January 12, 2018 3:02:26 PM
Attachments: Order Approving Annual Plan Report.pdf

*** WARNING: This is an EXTERNAL email. DO NOT open attachments or click links from UNKNOWN or UNEXPECTED email. ***

Notice of Service of Court Documents

Filing Information

Filing #: 470572
Filing Time: 01/12/2018 03:01:56 PM ET
Filer: Judicial Batch Admin 303-756-4564
Court: Twentieth Judicial Circuit in and for Charlotte County, Florida
Case #: 08-XXXXXXXXXXCPXX
Court Case #: XXXXXXXX-XXXXXX-XXXXXX
Case Style: GUARDIANSHIP OF: XXXXXXXX

Documents

Title	File
Order Approving Annual Plan Report	XXXXXXXXXX Order Approving Annual Plan Report.pdf

E-service recipients selected for service:

Name	Email Address
mwhite	XXXXXXXXXX@XXXXXX.com

E-service recipients not selected for service:

Name	Email Address
No Matching Entries	

This is an automatic email message generated by the Florida Courts E-Filing Portal. This email address does not receive email.

Thank you,
The Florida Courts E-Filing Portal

TIPS AND EXCEPTIONS

- **Commission with Copy of Will, Oath of Witness, Certificate of Commissioner**
 - Continue to send hard copies to Court via USPS. They will be returned via USPS in Stamped Envelope Provided by requesting counsel
- **Prior to first submission ONLY send a test email to each of the two email addresses and wait for confirmation from J.A. Put "Test" in the subject line.**
- **Body of Email now constitutes your cover letter**
- **CC (carbon copy) opposing counsel on submission email**
- **Certified Copy requests must go directly to the Clerk, NOT the Court (this includes checks, etc.)**

The Court appreciates your compliance with the above requirements.

Donald Mason

Administrative Judge

February 3, 2020

Judicial Assistant's E-mail: jgibbs@ca.cjis20.org