

## 1 Case Search

### 1.1 Results: Simple vs. Grid

At the bottom of the viewer, the user can define which style results they would like to view results.

#### Simple

Google-like results in paragraph form

Endless results exceeding 1,000

5 Results  
**2021-X0004** Petition for Letters of Administration (DRAFT)  
 ESTATE OF D. D. DECEASED  
 Commenced: 01/07/2021  
 Last Filing: 01/07/2021 Renunciation

#### Grid

Table-like results in columns and rows

Max 1,000 results (please specify additional criteria)

Case Number	Commencement Date	Status	Case Foundation Party	Caption	Case Type
Select 2021-X0004	1/7/2021	Open	D. D.	ESTATE OF D. D. DECEASED	DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)
Select 2021-X0003	1/9/2021	Open	VA, VA, VA	ESTATE OF VA, VA, VA, DECEASED	DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)
Select 2021-X0002	1/9/2021	Open	TEST, TEST	ESTATE OF TEST, TEST, DECEASED	DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)
Select 2021-X0001	1/9/2021	Open	TEST, TEST	ESTATE OF TEST, TEST, DECEASED	DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)
Select 2021-X0001	1/9/2021	Open	JAMES, TYLER	JAMES, TYLER, PROPOSED ADOPTEE	ADOPTION

### 1.2 Filter Search

\*Search field not available in all county viewers.

#### 1.2.1 General Search Box

Just type what you are interested in finding into the search box and click Enter. It will search the package in its entirety (i.e. docket text, filing types, names, addresses, etc.) It will not search the information contained within the documents.

#### 1.2.2 Case Category

Allows you to narrow down search results to a specific category of dockets.

#### 1.2.3 Case #

Type the Case Number you wish to view. You can use the dash, or no dash and it will still return the same results.

#### 1.2.4 Legacy # \*

This is the original case number assigned to the case prior to migration of the data into the new system. If you wish to search a case number that is considered a legacy number, you must use this field. (Some legacy numbers contain prefixes like RW00-00001 or CW00-00001.)

#### 1.2.5 Case Type

This is a list of Initial Filing types used to commence an action. The list includes both active and inactive filing types. Inactive filing types are available to select in order to search historical filings.

#### 1.2.6 Date Commenced

Two fields appear to allow the user to define a date range in order locate when a Case was Initiated within a certain time frame. If you want to search for one specific day, the date in both fields should be the same. If you want to search for any filing from a specific date to the current date, you only need to enter the first date.

#### 1.2.7 Filing Type

This is a list of Subsequent Filing types used to define actions within a specific case. The list includes both active and inactive filing types. Inactive filing types are available in order to search historical filings.

### 1.2.8 Filing Date

Two fields appear to allow the user to define a date range in order to locate when a specific subsequent filing type was filed. If you want to search for one specific day, the date in both fields should be the same. If you want to search for any filing from a specific date to the current date, you only need to enter the first date.

### 1.2.9 Case Status \*

Checkboxes that can be used to drill down on your search results by case status. They are defined by numbers that have different meanings in each County environment. [For example: 6=Closed]

### 1.2.10 Assigned Judge

List of Judges that differs in each County environment. You can define your search more precisely by selecting a Judge within your search criteria.

### 1.2.11 Attorney: Find:

Lists all attorneys that are in the Attorney Edit Application in the PSMC. List is different in each County environment. For the Attorney to appear in the list, the Attorney must either be a registered e-filer or has formally entered his/her appearance in a case in the specified County.

## 1.3 To View a Case

Once you have selected a case to view the primary details will be shown. Cases and case details are subject to permissions so you may not have access to all information. ***Pursuant to state and local guidelines, Adoption cases or other restricted filings cannot be viewed at all by external users.***

### Sections within a Case (See labels on the screenshot below)

- A. Case Information section – includes information like the Case Number, the filing type, townships, case party, status, etc.
- B. Party Member section - Case Foundation Parties/Personal Representatives/Interested Parties, etc. Case party members and representative along with contact information.
- C. Docket Entries – a list of all dockets, filings, or other transactions associated with the initial filing.
- D. Transaction History – Receipt numbers for any transactions that have taken place.
- E. Select links – opens the details for the record you clicked Select for. (For example, “Select” on a Docket record shows additional information for that docket.)
- F. Document button/Book icon – the Document button opens an additional tab to view that document. External users will either have to pay to view or they will be directed to the court to request visibility to documents.
- G. Docket dropdown – a dropdown of all dockets associated with the case.
- H. Document selection – lists all documents associated with that specific docket. If a document is restricted, only internal users with the proper permissions will be able to see it listed. Some Probate documents are restricted automatically by type – for example, photo IDs, medical opinions, and death certificates will automatically be restricted to all external users.



# How to Search the Viewer (Register of Wills)

Paperless Solutions, Inc

Paperless Case Management Application

**Case #2021-10004**  
 This case was recently filed and is currently being processed. The information displayed may be incomplete.

**Case Information:**  
 Case Number: 2021-10004  
 Commencement Date: 1/20/21  
 Status: Open  
 Cause: ESTATE OF D. D. DECEASED  
 Case Foundation Party: D, D  
 Case Type: DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)  
 Initial Filing: Petition for Letters of Administration  
 Address: LOWER MERION TOWNSHIP  
 Served: No

**Case Foundation Parties:**

Select	Name	Date of Death	Date of Birth	Address	Comment
	D, D	1/4/2021		3943 GLEN DR DOYLESTOWN, PA 18020 UNITED STATES	

**Personal Representatives:**

Select	Name	Representative	Address	Comment
	V, Y	ADMINISTRATOR	3513 CONCORD RD DOYLESTOWN, PA 18020 UNITED STATES	

**Interested Parties:**

Select	Name	Address	Comment
	V, N	3943 GLEN DR DOYLESTOWN, PA 18020 UNITED STATES	
	V, W	3513 CONCORD RD DOYLESTOWN, PA 18020 UNITED STATES	
	V, Y	3513 CONCORD RD DOYLESTOWN, PA 18020 UNITED STATES	

**Docket Entries:**

View as thread	Filing Date	Entry	Description	Docket Text	Sealed	Date Scanned	State Tax Receipt	Filing ID	Type
	1/20/21 9:58 AM	1	Petition for Letters of Administration	(DRAFT)	No	1/20/21 11:01 AM		185223	PR
	1/20/21 9:58 AM	2	Fee		No	1/20/21 11:01 AM		185224	PR
	1/20/21 9:58 AM	3	Inventory and Appraisal - Form Distributions		No	1/20/21 11:01 AM		185225	PR
	1/20/21 9:58 AM	4	Short Certificate - Fee Only		No	1/20/21 11:01 AM		185226	PR
	1/20/21 9:58 AM	5	Receipts - Fee Only		No	1/20/21 11:01 AM		185227	PR
	1/20/21 11:22 AM	6	Order of Non-Substantiating Wills		No	1/20/21 11:19 AM		185242	PR
	1/20/21 11:22 AM	7	Order of Wills of Will Executed by Test		No	1/20/21 11:22 AM		185243	PR
	1/20/21 11:22 AM	8	Probate Signatures		No	1/20/21 11:04 AM		185236	PR
	1/20/21 11:22 AM	9	Short Certificate		No	1/20/21 11:19 AM		185238	PR
	1/20/21 11:22 AM	10	Order of Substantiating Wills		No	1/20/21 11:19 AM		185240	PR
	1/20/21 11:22 AM	11	Order of Substantiating Wills History		No	1/20/21 11:08 AM		185241	PR
	1/20/21 11:22 AM	12	Inventory		No	1/20/21 11:07 AM		185244	PR
	1/20/21 11:22 AM	13	Receipts		No	1/20/21 11:07 AM		185245	PR
	1/20/21 11:22 AM	14	Probate		No	1/20/21 11:07 AM		185246	PR

**Transaction History:**

Date	Receipt Number	Amount
1/20/21 11:08 AM	2024-66-0006	\$101.26

**Docket Entry - ID = 185223**  
 This docket entry was recently filed and is currently being processed. The information displayed may be incomplete.

**Case Information:**  
 Case Number: 2021-10004  
 Commencement Date: 1/20/21  
 Status: Open  
 Cause: ESTATE OF D. D. DECEASED  
 Case Foundation Party: D, D  
 Case Type: DECEDENT'S ESTATE (INCLUDING TRUST UNDER WILL)  
 Initial Filing: Petition for Letters of Administration  
 Address: LOWER MERION TOWNSHIP  
 Served: No

**REGISTER OF WILLS OF MONTGOMERY COUNTY, PENNSYLVANIA**  
**Petition for Grant of Letters**

Petitioner(s) named below, who is/are 18 years of age or older, apply(ies) for Letters as specified below, and in support thereof aver(s) the following and respectfully request(s) the grant of Letters in the appropriate form:

**Decedent's Information**  
 Name: D D File No: 46-2021-X0004  
 a/k/a: (Assigned by Register)

**Date of Death:** 1/4/2021 **Age at Death:** 75  
 Social Security No: 097-54-6435

**Decedent was domiciled at death in MONTGOMERY, PA, with his/her last principal residence at 3943 GLEN DR, DOYLESTOWN, PA 18902.**  
 Decedent died at 3943 GLEN DR, DOYLESTOWN, PA 18902.

**Decedent died at 3943 GLEN DR, DOYLESTOWN, PA 18902.**

**Estimate of value of decedent's property at death:**

	All personal property	\$9,989.00
<i>If not domiciled in Pennsylvania</i>	Personal property in Pennsylvania	\$0.00
<i>If not domiciled in Pennsylvania</i>	Personal property in County	\$0.00
<i>If not domiciled in Pennsylvania</i>	Value of real estate in Pennsylvania	\$0.00
	<b>TOTAL ESTIMATED VALUE:</b>	<b>\$9,989.00</b>

**Real estate in Pennsylvania situated at:**  
 (Attach additional sheets, if necessary)

**A. Petition for Probate and Grant of Letters of Testamentary**  
 Petitioner(s) aver(s) he/she/they is/are the Executor(s) named in the last Will of the Decedent, dated \_\_\_\_\_ (Codici(s) therein dated \_\_\_\_\_)

**B. Petition for Grant of Letters of Administration**  
 If Administration, *c.a. or d.b.n.c.a.*, enter date of Will in section A above and complete list of heirs.  
 Except as follows, Decedent was not party in a pending divorce proceeding wherein the grounds for divorce had been established as defined in 23 Pa. C.S. § 3723(a), and was neither the victim of a killing nor ever adjudicated an incapacitated person.  
 \* No Exceptions \* Exceptions TEST

Petitioner(s), after a proper search has been ascertained that Decedent left no Will and was survived by the following spouse (if any) and heirs (attach additional sheets, if necessary):

Name	Relationship	Address
V, Y	SON	3513 CONCORD RD DOYLESTOWN, PA 18020

## 2 Case Party Search

A Party is the persons who are directly involved in a legal proceeding. On the docket they are broken down into two different areas: Corporation or Person. You will not be able to search a person's name in the Corp field, or a Corp in the Persons field. Many search functions are similar to Case Search.

### 2.1 Corp Name

An entity other than an individual. It can be a business, company, Estate, etc. If you want to search any of these entities, you must use this field.

### 2.2 Person Name

An individual that is related to the case. If you are searching by a person, you must enter their name into the first and last field.

### 2.3 Relation to Case

A person with relation to a case – possible results will vary by county. Possible options include: Guardian, Interested Party, ROW Case Foundation Party, Birth Mother, Birth Father, Adoptive Parent, Adoption Agency, New Adopted Name, Probate Commission Party

## 3 Probate Case Caveat Search

### 3.1 First Name/Last Name/Middle

The first, last, and middle names for the decedent. If you are unsure about the exact spelling, you can use the percent sign as a wild card. (Search examples: "Smi%", "%ith", and "%mit%" should all pull up a name like Smith.)

### 3.2 SNN

The social security number for the decedent.