



## COURT OF COMMON PLEAS OF UNION COUNTY, OHIO PROBATE AND JUVENILE DIVISION

### Instructions to eFile Protected Documents

Certain documents are protected in accordance with Ohio law, the Rules of Superintendence for the Courts of Ohio, Local Rules of Practice and Procedure and the Court's general and specific orders. See Page 2 of this document for a non-exhaustive list.

The Court requires that when filing protected documents, eFilers must adhere to the following two-step submission process.

#### → Step 1: Submit a Notice to the Court

1. Prepare a Notice to the Court (stating that the protected document is being submitted to the Court's secured file). eSign the document and the certificate of service, then save the Notice as a PDF.

*DO NOT* attach or include the protected document with the Notice PDF.

2. Log into the [eFiling Portal](#).
3. Click the **eFile** tab.
4. Enter the Case Number in the **Case Number** field.
5. Click **Create Subsequent Filing**.
6. Once the case opens, in the Documents section, select **NOTICE TO COURT** from the drop-down list. Attach the Notice.
7. Click **Continue with Filing** at the bottom of the screen.
8. Click **Submit Filing** at the bottom of the screen.

The screenshot shows the 'Create Subsequent Filing' button and a 'Case Number' input field. Below this is the 'Documents' section, which includes 'Document 1' with a 'Document Type' dropdown menu set to 'NOTICE TO COURT' and a 'Document Note' text area.

#### → Step 2: Submit the Protected Document

Immediately after submitting your Notice, repeat steps 3-5, above, then:

9. Once the case opens, in the Documents section, select **SECURED IMAGE ATTACHED** from the drop-down list.
10. *Briefly* describe the type of document you are submitting in the Document Note section.
11. Attach the PDF of the protected document and any protected exhibits.
12. Click **Continue with Filing** at the bottom of the screen.
13. Click **Submit Filing** at the bottom of the screen.

The screenshot shows the 'Documents' section with 'Document 1' and a 'Document Type' dropdown menu set to 'SECURED IMAGE ATTACHED'. The 'Document Note' text area contains the text 'Competency Evaluation'.



## Protected Documents

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Generally, documents (or information therein) deemed not a “public record” pursuant to R.C. 149.43 and/or deemed not a “case document” pursuant to Sup.R. 44(C)(1), if submitted to or filed with the Court, shall be filed with a notice, then submitted as a protected document, unless e-filing is specifically prohibited or excepted by the [Joint Administrative Order](#).

Specifically, the following protected documents and information shall be submitted via the process set forth on Page 1. The following is a non-exhaustive list but is intended to demonstrate protected documents and information most often filed into the record of matters before the Probate and Juvenile Courts.

- ☐ **Guardian ad litem Reports** (including collateral source documents attached to or filed with the reports)
- ☐ Court-ordered **investigations, assessments, risk assessments, reports and evaluations**
- ☐ **Medical and health care records and documents** that contain information including, but not limited to: physical, psychological, psychiatric and mental health assessments, treatment and diagnoses; counseling reports; residential treatment facility reports; statements of expert evaluation
- ☐ Documentation of progression and/or completion of **dispositional or sentencing orders** for a juvenile or adult (community control and probation records)
- ☐ **Personal identifiers** and documents containing personal identifiers, as defined Sup.R. 44(H), submitted or filed pursuant to Sup.R. 45(D)(2)
- ☐ **Home investigation and child custody evaluations and reports**, including collateral source documents attached to or filed with the reports
- ☐ **Supervised parenting time, companionship or visitation records and reports**, including exchange records and reports
- ☐ **All documents and pleadings** filed in **R.C. 2151.85 (Judicial Bypass)** actions

If you have questions about whether a document is protected, please contact the appropriate Clerk’s Office during normal Court business hours (Monday through Friday, 8:30 a.m. to 4:00 p.m.).

### **Probate Division Clerk’s Office**

(937) 645-3029 Ext. 3405

[probatecourt@unioncountyohio.gov](mailto:probatecourt@unioncountyohio.gov)

### **Juvenile Division Clerk’s Office**

(937) 645-3029 Ext. 3411

[juvenilecourt@unioncountyohio.gov](mailto:juvenilecourt@unioncountyohio.gov)