

Probate Standing Order PR-2014-002

JAN 31 2014

Administrative Order	)	In the Probate Court
	)	
Regarding	)	of
	)	
eFiling	)	Denton County, Texas

CYNTHIA MITCHELL  
CLERK

**Administrative and Standing Order Regarding  
the eFiling of Inventory, Annual Account and Account for Final Settlement**

The Supreme Court of Texas adopted Texas Rule of Civil Procedure (TRCP) 21c, Privacy Protection for Filed Documents, effective January 1, 2014. TRCP 21c defines sensitive data as follows:

- (1) a driver’s license number, passport number, social security number, tax identification number, or similar government-issued personal identification number;
- (2) a bank account number, credit card number, or other financial account number; and
- (3) a birth date, home address, and the name of any person who was a minor when the underlying suit was filed.

Unless sensitive data is specifically required by a statute, court rule, or administrative regulation, a document containing sensitive data (except wills and documents filed under seal) may not be filed unless the sensitive data is “redacted by using the letter ‘X’ in place of each omitted digit or character or by removing the sensitive data **in a manner indicating that the data has been redacted.**” The filing party is required to retain an unredacted version of the filed document while the case is ongoing.

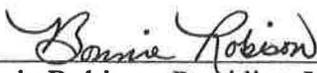
Given new Rule 21c, the undersigned presiding Judge of Denton County Probate Court finds there is need for an administrative order setting out procedures to be followed when an inventory, annual account and/or account for final settlement is required in guardianship and probate estates.

**It is Therefore Ordered** that the following procedures must be followed when any inventory, annual account or account for final settlement is filed in Denton County Probate Court effective January 1, 2014.

- A. File the inventory or accounting in compliance with TRCP 21c, redacting sensitive data as needed. For example, redact any sensitive data contained in the required verifications of deposit, confirmations of safekeeping and tax affidavits such as, but not limited to, Social Security numbers and bank account numbers.
- B. File the inventory or accounting electronically as required by Texas Supreme Court Order and TRCP Rule 21.

- C. Supporting vouchers and other documents submitted with accountings pursuant to Texas Estates Code §359.003, including, but not limited to, financial statements, brokerage statements, copies of checks or other back-up information to an inventory, annual account or account for final settlement shall not be filed with the Clerk.
- D. Within 7 business days of filing the accounting, the filing party shall deliver a paper copy of the following by mail or by hand delivery to the office of the Probate Court Auditor/Attorney.
1. An **unredacted** copy of the filed accounting that clearly indicates on the first page the date the accounting was filed.
  2. All required **unredacted** supporting documents, including but not limited to copies of financial statements, bank statements, returned checks, brokerage statements, etc. The unredacted supporting documents will not be filed with the Clerk. Counsel has 30 days after an inventory or accounting is approved to pick up the supporting documents that were delivered to the Probate Court Auditor/Attorney. If the supporting documents are not picked up within 30 days, the Court will destroy them.
  3. If it is a first annual accounting, an unredacted copy of the inventory.
  4. In a probate, the names and birth dates of all minor heirs, if any.
- E. See Denton County Probate Court website <http://dentoncounty.com/pc> for Probate Court Auditor/Attorney checklist for inventory and accountings.

Signed on Jan. 31, 2014

  
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Bonnie Robison, Presiding Judge

**HON. BONNIE J. ROBISON  
JUDGE, PROBATE COURT**

