

Philadelphia Bar Association

Family Law Section Minutes

January 8, 2018

- I. **WELCOME AND INTRODUCTION:** Ann welcomed the group and attending Judges.
- II. **ANNOUNCEMENTS:**
- III. **PROGRAM:**
 - a. Speakers are Bill Schneck and Peggy E. Rubin
 - b. AOPC Author is Dave Thomas - Phone number: (717) 2321-3300
 - c. The Court does not want any documents filed with any personal information such as: SS numbers, DOB, financial account numbers, Driver License numbers, minors names and DOB and all personal and employment information of abuse victims (Abuse Victim Addendum form required). If you must file documents with this information you will file a Confidential Information Form/Abuse Victim Addendum along with your pleading. In the alternative, each Court has the option to use the "redacted" and "unredacted" version policy. Meaning you file two versions of the same document, one with redacted confidential information and without. In either event we must certify compliance with the policy with every pleading. It does appear that the Abuse Victim Addendum form is required in all counties.
 - d. A view of the applicable highlights of the policy are as follows:
 - 1) Children's names and DOB will require a Confidential Information Sheet and you must label the reference in the pleadings.
 - 2) Abuse victim information will always require a Confidential Information Sheet with Abuse Victim Addendum.
 - e. The Confidential Document sheet covers most, if not all, of the documents we typically would be filing and can be addressed with this form. They are as follows:
 - i. Financial Source Documents as listed on the form
 - 1. Tax Returns and schedules
 - 2. W-2 forms and schedules including 1099 forms or similar documents
 - 3. Wage stubs, earning statements, or other similar documents
 - 4. Credit card statements
 - 5. Financial institution statements (e.g., investment/bank statements)
 - 6. Check registers
 - 7. Checks or equivalent
 - 8. Loan application documents
 - ii. Minors' educational records
 - iii. Medical/Psychological records are defined as "records relating to the past, present, or future physical or mental health or condition of an individual"
 - iv. Children and Youth Services' records

- v. Marital Property Inventory and Pre-Trial Statement as provided in Pa.R.C.P. No. 1920.33
 - vi. Income and Expense Statement as provided in Pa.R.C.P. No. 1910.27(c)
 - vii. Agreements between the parties as used in 23 Pa.C.S. §3105
- f. A simplistic practice point going forward is to not use any of the information in any pleading you are filing with the Court. Having adobe writing programs will be key and making redacted versions of financial documents upon receipt in the office for easy filing purposes if needed. Bank account references and statements showing only last 4 digits are allowed. The largest hassle in Philadelphia County will be listing children's names and dates of birth, making every pleading containing that information to be filed in two forms, redacted and unredacted.
- g. Other Counties
- i. Bucks - Requires confidential information forms under 7.0 and 8.0 for all submissions along with the certification. If e-filing, the certification is provided in a drop down box to click to complete filing.
 - ii. Delco & Chester - of course, they list nothing and that you must contact the Administrator.
 - iii. Montco - the pleading with confidential information must be filed in two versions, redacted and unredacted. Any confidential document/exhibit must be filed separate from the pleading with a confidential document form.
 - iv. Philadelphia - File two versions, redacted/unredacted, for pleadings containing confidential information with no form. DRIS still filed and attached to unredacted.
- h. A useful section of the policy will be implemented regarding the Correction of Clerical Errors in Case Records (form attached). We now have a formal application to make to the Court when we notice that the docket is incorrect. We must serve all interested parties with the request and the Court shall respond within (10) days.

IV. GOOD AND WELFARE

Next Meeting: February 5, 2018

Respectfully submitted: Eileen G. Murphy