



# Protecting Confidential Documents - Here's How

## *Case Records Public Access Policy of the Unified Judicial System of Pennsylvania* **Section 8.0 Confidential Document Form**

Unless required by applicable authority, the following documents are confidential and shall be filed with a court or custodian with the Confidential Document Form.

### What documents are confidential?

- Financial Source Documents
- Minors' Educational Records
- Medical/Psychological Records
- Children and Youth Services Records
- Marital Property Inventory and Pre-Trial Statement as provided in Pa.R.C.P. No. 1920.33
- Income and Expense Statement as provided in Pa.R.C.P. No. 1910.27(c)
- Agreements between Parties as used in 23 Pa.C.S. § 3105

### How do I file with a Confidential Document Form?

The Confidential Document Form and detailed filing instructions can be found on the website or QR Code at the bottom of this page. The Confidential Document Form is not required in cases (e.g. juvenile, adoption) that are sealed or exempted from public access pursuant to applicable authority.

Parties and their attorneys shall be solely responsible for complying with the provisions of the policy and shall certify their compliance to the court. A certification is included on the Confidential Document Form, stating: "I certify that this filing complies with the provisions of the *Case Records Public Access Policy of the Unified Judicial System of Pennsylvania* that require filing confidential information and documents differently than non-confidential information and documents."

Confidential documents submitted with the Confidential Document Form shall not be accessible to the public, except as ordered by a court. However, the Confidential Document Form or a copy of it shall be accessible to the public.

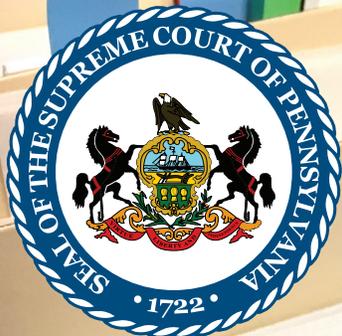
### What else do I need to know?

- A court or custodian is not required to review or redact any filed document for compliance with this section. A party's or attorney's failure to comply with this section shall not affect access to case records that are otherwise accessible.
- If a filed document fails to comply with the above referenced policy, a court of record may, upon motion or its own initiative, with or without a hearing, order the filed document sealed; a magisterial district court may do so upon request or its own initiative.
- A court of record may impose sanctions, including costs necessary to prepare a compliant document for filing in accordance with applicable authority.

*Section 8.0 shall apply to all documents for any case filed by a party or their attorney with a court or custodian.*

For more information: Visit <http://www.pacourts.us/public-record-policies>.





# Protecting Confidential Information - Here's How

## Case Records Public Access Policy of the Unified Judicial System of Pennsylvania Section 7.0 Confidential Information Form

Unless required by applicable authority, the following information is confidential and shall not be included in any document filed with the court or custodian, except on a Confidential Information Form filed contemporaneously with the document.

### How do I file with a Confidential Information Form?

The Confidential Information Form and detailed filing instructions can be found on the website or QR Code at the bottom of this page. The Confidential Information Form is not required in cases (e.g. juvenile, adoption) that are sealed or exempted from public access pursuant to applicable authority.

Parties and their attorneys shall be solely responsible for complying with the provisions of the policy and shall certify their compliance to the court. A certification is included on the Confidential Information Form, stating: "I certify that this filing complies with the provisions of the *Case Records Public Access Policy of the Unified Judicial System of Pennsylvania* that require filing confidential information and documents differently than non-confidential information and documents."

### What information is confidential?

- Social Security Numbers
- Financial Account Numbers except the last four digits when the financial account is the subject of the case and cannot otherwise be identified
- Driver License Numbers
- State Identification (SID) Numbers
- Minors' Names and Dates of Birth (except when minor is charged as a defendant in a criminal matter)
- Abuse Victim's Address and Other Contact Information in family court actions (including: employer's name, address and work schedule)

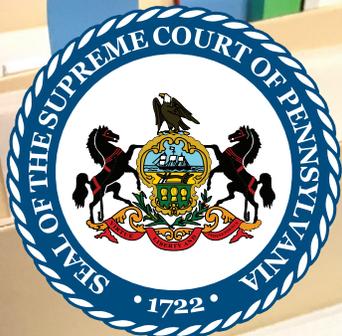
### What else do I need to know?

- A court or custodian is not required to review or redact any filed document for compliance with this section. A party's or attorney's failure to comply with this section shall not affect access to case records that are otherwise accessible.
- If a filed document fails to comply with the requirements of the above referenced policy, a court of record may, upon motion or its own initiative, with or without a hearing, order the filed document sealed, redacted, amended or any combination thereof; a magisterial district court may, upon request or its own initiative, redact, amend or both.
- A court of record may impose sanctions, including costs necessary to prepare a compliant document for filing in accordance with applicable authority.

*Section 7.0 shall apply to all documents for any case filed by a party or their attorney with a court or custodian.*

For more information: Visit <http://www.pacourts.us/public-record-policies>.





# Protecting Confidential Information - Here's How

## Case Records Public Access Policy of The Unified Judicial System Of Pennsylvania Section 7.0 Redacted And Unredacted Filings

Unless required by applicable authority, two versions of every document must be filed with the court – a “Redacted Version” (not including the items listed below) and an “Unredacted Version” (shall include the items listed below). Redactions must be made in a manner that is visibly evident to the reader. **Only the redacted version will be accessible to the public.**

Parties and their attorneys shall be solely responsible for complying with the provisions of the policy and shall certify their compliance to the court. The certification that shall accompany each filing shall be substantially in the following form: “I certify that this filing complies with the provisions of the *Case Records Public Access Policy Of The Unified Judicial System Of Pennsylvania* that require filing confidential information and documents differently than non-confidential information and documents.”

A sample certification form can be found on the website or QR code at the bottom of this page.

Filing a “Redacted Version” and “Unredacted Version” is not required in cases (e.g. juvenile, adoption) that are sealed or exempted from public access pursuant to applicable authority.

### What information is confidential and should be redacted?

- Social Security Numbers
- Financial Account Numbers except the last four digits when the financial account is the subject of the case and cannot otherwise be identified
- Driver License Numbers
- State Identification (SID) Numbers
- Minors’ Names and Dates of Birth (except when minor is charged as a defendant in a criminal matter)
- Abuse Victim’s Address and Other Contact Information in family court actions (including: employer’s name, address and work schedule)

### What else do I need to know?

- A court or custodian is not required to review or redact any filed document for compliance with this section. A party’s or attorney’s failure to comply with this section shall not affect access to case records that are otherwise accessible.
- If a filed document fails to comply with the above referenced policy, a court of record may, upon motion or its own initiative, with or without hearing, order the filed document sealed; a magisterial district court may do so upon request or its own initiative.
- A court of record may impose sanctions, including costs necessary to prepare a compliant document for filing in accordance with applicable authority.

*Section 7.0 shall apply to all documents for any case filed by a party or their attorney with a court or custodian.*

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