

YAVAPAI COUNTY
Self-Service Center

**INSTRUCTIONS FOR: COMPLETING ENVELOPE COVER SHEET (CONFIDENTIAL DOCUMENT
PURGED FROM THE FILE)**

Confidential Document Cover Sheet is available from the Clerk of Superior Court or in the Law Library

Other than confidential documents and arrest warrants, documents filed with the court shall not contain confidential information. A confidential document shall not be maintained as part of the public record of a probate case. Listed below are the criteria for documents considered confidential.

1. "CONFIDENTIAL DOCUMENT" means the following:
 - a. The probate information form filed pursuant to Rule 6 of Arizona Rules of Probate Practice;
 - b. medical reports and records obtained and filed with the court in connection with proceedings pursuant to A.R.S. §§ 14-5303, -5310, -5401.01, or -5407, or A.R.S. § 36-3206, or in connection with the requirements of A.R.S. § 14-5312.01 and -5312.02;
 - c. budgets filed pursuant to Rule 30.2 and 30.3 of these rules;
 - d. inventories and appraisements filed pursuant to A.R.S. §§ 14-5418(A);
 - e. accounts filed pursuant to A.R.S. Title 14;
 - f. a credit report; or
 - g. any other document ordered by the court to be filed or maintained as a confidential document pursuant to this rule.
2. "CONFIDENTIAL INFORMATION" means the following:
 - a. A social security number of a living person;
 - b. any account number for a financial account, unless limited to the last four digits only; or
 - c. any other information determined by the court to be confidential.
3. "FINANCIAL ACCOUNT" includes credit card account, bank account, brokerage account, insurance policy, and annuity contract.

When filing a confidential document, or a document containing confidential information, **you are required to do the following:**

TYPE OR PRINT USING BLACK INK ONLY

- ✓ Complete the upper part of the form with the case name, and the case number.
- ✓ Check the document name or complete "Other" document description.
- ✓ Fill in the date the document is being filed with the Clerk of Court.
- ✓ Person Filing: the person filing the confidential document shall enter their name and their status in the case (guardian, conservator, personal representative.)
- ✓ Place the original document in an 8 ½" by 11" or larger envelope if necessary.
- ✓ Tape the completed envelope cover sheet to the front of the envelope.
- ✓ **A separate envelope shall be used for each confidential document.**
- ✓ File the envelope with the Clerk of Superior Court along with a copy of the document enclosed therein.
- ✓ The Clerk will stamp the copy of the document for you to keep for your records.

CONFIDENTIAL DOCUMENTS WILL NOT BE ACCEPTED BY THE CLERK FOR FILING
WITHOUT THE ENVELOPE AND REQUIRED INFORMATION AFFIXED.