



Protecting Confidential Information & Documents - Here's How

A certification shall accompany each filing in accordance with the *Case Records Public Access Policy of the Unified Judicial System of Pennsylvania*. A court or custodian is not required to review any filed document for compliance with this policy. Failure to comply may lead to imposed sanctions.

Confidential Information

The following information shall not be included in any document filed with a court or custodian, except on a "Confidential Information Form" filed contemporaneously with the document.

1. Social Security Numbers
2. Financial Account Numbers (except an active financial account number may be identified by the last four digits when the financial account is the subject of the case and cannot otherwise be identified)
3. Driver License Numbers
4. State Identification (SID) Numbers
5. Minors' Names and Dates of Birth except when a minor is charged as defendant in a criminal matter (see 42 Pa.C.S. § 6355)
6. Abuse Victim's Address and other Contact Information including employer's name, address, and work schedule, in family court actions as defined by Pa.R.Civ.P. 1931(a), except for victim's name

Confidential Documents

The following documents shall be filed with a court or custodian with the "Confidential Document Form."

1. Financial Source Documents
2. Minors' Educational Records
3. Medical/Psychological Records
4. Children and Youth Services' Records
5. Marital Property Inventory and Pre-Trial Statement as provided in Pa.R.Civ.P. 1920.33
6. Income and Expense Statement as provided in Pa.R.Civ.P. 1910.27(c)
7. Agreements between the Parties as used in 23 Pa.C.S. § 3105

These requirements do not apply to case types (e.g. Juvenile, adoption) that are sealed or exempted from public access pursuant to applicable authority.

For forms and more information, reference the *Case Records Public Access Policy of the Unified Judicial System of Pennsylvania* at the website below.

Please visit:
<https://www.pacourts.us/public-records/public-records-policies>





Protecting Confidential Documents - Here's How

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

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.Civ.P. 1920.33
- Income and Expense Statement as provided in Pa.R.Civ.P. 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 for failure to comply.

For more information: Visit <https://www.pacourts.us/public-records/public-records-policies>





Protecting Confidential Information - Here's How

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

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.

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)

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 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, order the filed document redacted, amended, or both.
- A court of record may impose sanctions, including costs necessary to prepare a compliant document for filing in accordance with applicable authority.

For more information: Visit <https://www.pacourts.us/public-records/public-records-policies>

