

Flowchart B

FLOWCHART B—AFTER THE CASE IS STARTED
(from appointment of personal rep to creditor claims)

12
(Court may set hearing.)
Give or publish notice of hearing. [P-339](#).

13
(Court may hold a hearing.*) Court makes 1st order starting probate, deciding if there's a valid will, and appointing PR. Court issues [letters](#).

14
PR prepares & timely files required tax forms. [\(more tax info here\)](#)

15
PR sends information to [heirs and devisees](#). [P-340](#)

16
PR prepares and sends copy of inventory to all requestors. [P-370](#)

Before making an inventory, the personal representative must gather and safeguard property of the estate; look for bank accounts; and look for bills from creditors. Click [here](#) for more information.

17
PR publishes notice to [creditors](#) 3 times for 3 weeks in a row.* Then files affidavit of publication. [P-341 & P-342](#)

**Send actual notice to creditors you know about or should know about. For example, if there was an accident, look for bills from the ambulance, hospital, doctors, and others. If there was a house, look for bills from utility companies, etc. Do not rely on CourtView or the published notices only. Check your mail for bills. [108 S.Ct. 1340 (1988)]

18
PR checks CourtView and other places for any creditor claims.** [\(find CourtView\)](#)

16
PR prepares and sends copy of inventory to all requestors. [P-370](#)

19
Send notices of disallowance, if any. [P-345](#)

20
Court holds hearing*** to decide creditor petitions.

*You will be required to prove your case at this and other hearings by presenting evidence. You may want to call witnesses. Click [here](#) for more information.

SMALL ESTATE process may be used only if BOTH of the following are true:

1. This is an informal probate case (see Flowchart A for informal probate requirements), AND
2. The net value of all property (net value means total value minus related debts and liens) is less than or equal to the sum of allowances and costs listed below:
 - a. [Homestead allowance](#)
 - b. [Family allowance](#)
 - c. [Exempt property](#)
 - d. Probate costs
 - e. Reasonable funeral costs
 - f. Reasonable and necessary medical costs of last illness

***This is an evidentiary hearing where the PR must appear and be prepared to provide evidence and call witnesses.

Go to flowchart C