

Case Summary Memorandum Instructions

Purpose

The Case Summary Memorandum (“case memo”) collects essential information to have a productive Case Management Conference and to plan the Court’s trial schedule.¹ After receiving the case memo and conducting the conference, the Court will provide a timeline for case events to ensure the case is done/disposed/resolved in a timely manner.

General Instructions

1. The case memo must be completed in full by Plaintiff’s counsel or by an unrepresented plaintiff within 60 days of filing a complaint. All other parties are encouraged to file a case memo.
2. Plaintiffs are encouraged to be as detailed as possible in answering the case memo questions. Responses such as “unknown”, “blank” or “to be determined” are generally not acceptable.
3. In addition to a brief summary of the case (limit 200 words), it may be helpful to include “other pertinent information” when relevant. Other pertinent information may include: status of service, discussion of venue, pleadings status, discovery status, likelihood of joining additional parties, theories of liability, damages, applicable defenses, and the procedural status of the case. More information may lead to a more productive and meaningful conference.
4. The completed case memo must be filed with the Department of Court Records by visiting dcr.alleghenycounty.us/civil/² and selecting the docket type “Case Summary Memorandum”.³
5. The completed case memo must be served upon the opposing parties and/or upon opposing counsel.
6. The parties are encouraged but not required to consult with each other and discuss issues prior to the conference.

For questions regarding this document, you **MUST** contact the Case Management Coordinator at civilcasemanagement@alleghenycourts.us.

¹ See Local Rule 212.1(3) for further explanation of the purpose.

² . For assistance with the Department of Court Records e-filing process, please visit https://dcr.alleghenycounty.us/DCR_efiling_Video_Tutorials.html

³ If the “Case Summary Memo” docket type is not selected, the filing will be rejected.

Case Summary Memorandum

THIS DOCUMENT IS SOLELY USED FOR CASE MANAGEMENT PURPOSES
AND SHALL NOT BE USED FOR ANY OTHER PURPOSE.

1. Plaintiff - Date of alleged contract breach/transaction/injury?
2. Plaintiff - Provide a summary of facts giving rise to the cause of action, or other pertinent information relating to the matter which you believe the Court should know. (limit 200 words)
3. Plaintiff & Defendant - Are there any related cases or claims pending? (If so, list caption(s), docket number(s) or other appropriate identifiers)
4. Defendant – Provide a summary supporting any defenses/mitigating claims/counterclaims in response to Plaintiff's cause of action or other pertinent information relating to the matter which you believe the Court should know. (limit 200 words)
5. Plaintiff - Current Demand (if applicable)
6. Defendant - Current Offer (if applicable)
7. At this time, are there any pro se parties or out-of-county counsel, if so, please identify party type and list addresses below:
8. Plaintiff & Defendant - Estimate the number of days required for the trial of this case, including the time required for jury selection, closing arguments and charge:
 - ☐ No more than 1 trial day
 - ☐ 2 to 3 trial days
 - ☐ 4 to 6 trial days
 - ☐ 7 to 10 trial days
 - ☐ 11 to 15 trial days
 - ☐ More than 15 trial days
9. Plaintiff & Defendant - A Jury trial:
 - ☐ Has been requested
 - ☐ Has NOT been requested