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. After receiving the case memo and conducting the conference, the Court will issue a Case Management Order providing case event deadlines and an expected trial term for the case.

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. Parties are encouraged to be as detailed as possible in answering the case memo questions. Responses such as "unknown", "blank" or "to be determined" are not acceptable; please do your best to complete the memo based on your knowledge at that time.
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.
4. The completed case memo must be filed with the Department of Court Records by visiting dcr.alleghenycounty.us/civil/ and selecting the docket type "Case Summary Memorandum". Upon selecting this docket type, the filing will be confidential and inaccessible to the public. **Failure to select the "Case Summary Memorandum docket type may result in the permanent public availability of this filing.**
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**.

IN THE COURT OF COMMON PLEAS OF ALLEGHENY COUNTY, PENNSYLVANIA
CIVIL DIVISION

COVER SHEET

Plaintiff(s)	Case Number :
Vs.	Type of pleading :
Defendant(s)	Filed on behalf of (Name of the filing party)
	☐ Counsel of Record ☐ Individual, If Pro Se
	Address, Telephone Number, and Email Address:
	Attorney's State ID
	Attorney's Firm ID

FIFTH JUDICIAL DISTRICT OF PENNSYLVANIA COURT OF COMMON PLEAS
– CIVIL DIVISION
CASE MANAGEMENT DEPARTMENT
414 GRANT STREET, ROOM 818 1/2, PITTSBURGH, PA 15219
TELEPHONE: 412-350-7385 EMAIL: civilcasemanagement@alleghenycourts.us

CASE SUMMARY MEMORANDUM

Plaintiff (or plaintiff's counsel) must complete this form and file this document with the Allegheny County Department of Court Records by selecting "Case Summary Memorandum" within 60 days of filing a complaint.

Case Information

Docket Number _____

Case Caption _____

Current Demand or Current Offer _____

Date of Transaction, Contract, or Injury _____ **Current Age of Client(s):** _____ **Age(s) at Time of Transaction, Contract, or Injury:** _____

Summary of Facts Giving Rise to the Cause of Action and Other Pertinent Information

(limit 200 words)

Related Cases or Claims Pending? *(If so, list caption(s), docket number(s), or other identifiers.)*	**Any pro se parties or out-of-county counsel?** *(If so, identify party type and list addresses below.)*

Jury Trial	**Anticipated Trial Length**
☐ Has been requested *(Please enter the anticipated trial length. →)* ☐ Has NOT been requested	☐ 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

Signature _____ **Date** _____

Name _____ **Email** _____ **Phone** _____

THIS DOCUMENT IS SOLELY USED FOR CASE MANAGEMENT PURPOSES AND IS CONFIDENTIAL