

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**

<p>Plaintiff(s)</p> <div style="border: 1px solid black; height: 150px; margin: 5px 0;"></div> <p style="text-align: center;">Vs.</p> <p>Defendant(s)</p> <div style="border: 1px solid black; height: 150px; margin: 5px 0;"></div>	<div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> <p>Case Number :</p>
	<p>Type of pleading :</p> <div style="border: 1px solid black; padding: 5px; text-align: center; margin: 5px 0;">Case Summary Memorandum</div>
	<p>Filed on behalf of</p> <div style="border: 1px solid black; height: 40px; margin: 5px 0;"></div> <p>(Name of the filing party)</p>
	<p><input type="checkbox"/> Counsel of Record</p> <p><input type="checkbox"/> Individual, If Pro Se</p>
	<p>Address, Telephone Number, and Email Address:</p> <div style="border: 1px solid black; height: 60px; margin: 5px 0;"></div>
	<p>Attorney's State ID <div style="border: 1px solid black; width: 100px; height: 20px; display: inline-block; vertical-align: middle;"></div></p>
	<p>Attorney's Firm ID <div style="border: 1px solid black; width: 100px; height: 20px; display: inline-block; vertical-align: middle;"></div></p>



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@allegheycourts.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 <i>(limit 200 words)</i>	
Related Cases or Claims Pending? <i>(If so, list caption(s), docket number(s), or other identifiers.)</i>	Any pro se parties or out-of-county counsel? <i>(If so, identify party type and list addresses below.)</i>
Jury Trial	Anticipated Trial Length
<input type="checkbox"/> Has been requested <i>(Please enter the anticipated trial length. →)</i> <input type="checkbox"/> Has NOT been requested	<input type="checkbox"/> No more than 1 trial day <input type="checkbox"/> 2 to 3 trial days <input type="checkbox"/> 4 to 6 trial days <input type="checkbox"/> 7 to 10 trial days <input type="checkbox"/> 11 to 15 trial days <input type="checkbox"/> More than 15 trial days
Signature _____	Date _____
Name _____	Email _____ Phone _____