

IN THE COURT OF COMMON PLEAS OF PHILADELPHIA COUNTY
FIRST JUDICIAL DISTRICT OF PENNSYLVANIA
CIVIL TRIAL DIVISION

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CASE MANAGEMENT CONFERENCE MEMORANDUM

Filing party: _____ By: _____, Esq.

Counsel's address and telephone number (**IMPORTANT**) _____

Part A
(to be completed in personal injury cases)

1. Date of accident or occurrence: _____
1(a). Age of Plaintiff(s): _____
2. Most serious injuries sustained: _____

3. Is there any permanent injury claimed? Yes No
If yes, indicate the type of permanent injury: _____

4. Dates of medical treatment: _____
5. Is medical treatment continuing? Yes No
6. Has there been an inpatient hospitalization? Yes No

This form shall be presented to the Case Manager and copies served upon all parties at the Case Management Conference by counsel prepared to discuss its contents.

7. Has there been any surgery? Yes No

If yes, indicate the type of surgery: _____

8. Approximate medical bills to date: \$ _____

Approximate medical bills recoverable in this case: \$ _____

9. Are there any existing liens (Workers Compensation, DPW, Medical, etc.)? Yes No

If yes, what type and approximate amount? _____

10. Time lost from work: _____

11. Approximate past lost wages: _____

12. Is there a claim for future lost earning capacity? Yes No

If yes, approximate future lost earning capacity: _____

13. Are there any related cases or claims pending? Yes No

If so, list caption(s) or other appropriate identifier: _____

14. Do you anticipate joining additional parties? Yes No

15. Plaintiff's factual position as to liability: _____

16. Defense factual position as to liability: _____

17. Defense position as to causation of injuries alleged: _____

18. Identify all applicable insurance coverage:

<i>Defendant</i>	<i>Insurance Carrier</i>	<i>Coverage Limits</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Are there issues as to the applicability of the above insurance coverage: Yes No

19. Demand: \$ _____ Offer: \$ _____

Part B

(to be completed in all cases other than personal injury)

1. Date of contract of transaction: _____

2. Is there a writing? Yes No

If yes, is there an allegation that the writing does not contain the entire agreement of the parties? Yes No

3. Is the Uniform Commercial Code applicable to this case? Yes No

4. Describe the nature of the conduct alleged as giving rise to the cause of action:

5. State the amount of damages claimed by Plaintiff:

(a) Direct _____

(b) Consequential _____

(c) Other (specify) _____

6. Defense position as to alleged nature of conduct giving rise to cause of action and any counterclaim:

7. If there is a counterclaim, state the amount of damages sought:

(a) Direct _____

(b) Consequential _____

(c) Other (specify) _____

8. Identify all applicable insurance coverage:

<i>Defendant</i>	<i>Insurance Carrier</i>	<i>Coverage Limits</i>
_____	_____	_____
_____	_____	_____

9. Demand: \$ _____ Offer: \$ _____