

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  
COMMERCE CASE MANAGEMENT

Filing party: \_\_\_\_\_ by: \_\_\_\_\_, Esquire

Counsel's address and telephone number: \_\_\_\_\_

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1. Date of contract or transaction dates: \_\_\_\_\_

2. Date of birth of your individual client: \_\_\_\_\_

\_\_\_\_\_ N/A \_\_\_\_\_ Unknown \_\_\_\_\_ Decline to provide

*NOTE: Date of birth information is intended for the Court's use only. The information will not be made available to the public.*

3. 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

4. Is the Uniform Commercial Code applicable to this case? \_\_\_\_\_ yes \_\_\_\_\_ no

5. Describe the nature of the conduct alleged as giving rise to the cause of action or, if defense, the nature of the defense:

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6. State the amount of the damages claimed by Plaintiff and explain how damages are calculated:

(a) Direct \_\_\_\_\_

(b) Consequential \_\_\_\_\_

(c) Other (specify) \_\_\_\_\_

7. Is there a counterclaim? \_\_\_\_\_yes \_\_\_\_\_no

If yes, state the basis of the claim (e.g., contract, tortious interference, etc.).

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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.

8. State the amount of damages sought in the counterclaim:

- a. Direct \_\_\_\_\_
- b. Consequential \_\_\_\_\_
- c. Other (specify) \_\_\_\_\_

9. List five (or more) acceptable Commerce Program Judges Pro Tem for mandatory settlement conference purposes:

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8(a). Discuss whether and when early Mediation would be worthwhile:

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10. Are there related case(s)? \_\_\_\_\_yes \_\_\_\_\_no.

If yes, identify:

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11. Identify applicable insurance coverage and note if there are insurance coverage issues:

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12. Identify anticipated areas of expert testimony:

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13. Requested Track: Expedited (13 months) Standard (18 months) Complex (24 months).

14. Additional Comments (if any):

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15. Is this \_\_\_ Jury or \_\_\_ Non-Jury matter?

16. Demand: \$ \_\_\_\_\_ Offer: \$ \_\_\_\_\_