

## PRETRIAL CONFERENCE CHECKLIST

### JUDGE:

(Pursuant to Fla. R. Civ. P. 1.200(k))

<b>CASE NO.:</b> _____	<b>PTC DATE:</b> _____
<b>CASE STYLE:</b> Plaintiff:  (1): _____ (2): _____ (3): _____	Defendant(s):  (1): _____ (2): _____ (3): _____
<b>TRIAL ATTORNEY(s) FOR:</b> Plaintiff:  (1): _____ (2): _____ (3): _____	<b>TRIAL ATTORNEY(s) FOR:</b> Defendant(s):  (1): _____ (2): _____ (3): _____

<b>Date Order Setting Trial:</b>  _____	<b>Date CMO Entered:</b>  _____	<b>CMO Projected Trial Date:</b>  _____
<b>Trial Length:</b> _____ (days/weeks)	<b>Jury Trial:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Continued from Prior Docket?</b> : <input type="checkbox"/> Yes <input type="checkbox"/> No. Date last trial docket: _____		
Has <b>Mediation</b> been held? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when is it scheduled?  Is <b>Settlement</b> still a possibility? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe		

1	<b>Pretrial Meeting of Counsel</b> completed? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when scheduled? _____	<b>Joint Pretrial Stipulation (“JPTS”)</b> filed? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when filed? _____
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2	Do the parties have a <b>Statement of the Case</b> to be read to venire: <input type="checkbox"/> Yes <input type="checkbox"/> No  Statement of Case in JPTS? <input type="checkbox"/> Yes <input type="checkbox"/> No
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3	Have typed proposed <b>Jury Instructions</b> and <b>Verdict Forms</b> been submitted to the Court prior to the Pre-Trial Conference? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when will the <b>jury instructions</b> and <b>verdict forms</b> be filed with the Clerk and submitted to the Court? _____
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4	Will early <b>Substantive Jury Instructions</b> , including the law be given <b>prior to Opening Statement</b> ? <input type="checkbox"/> Yes <input type="checkbox"/> No
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5	Are there any objections or concerns to <b>Jurors</b> taking <b>notes</b> and asking <b>questions</b> of witnesses (See Section 40.50, Florida Statutes and Rule 1.452, Fl. R. Civ. Pr.)?  <input type="checkbox"/> Yes <input type="checkbox"/> No
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6	How many prospective <b>Jurors</b> are requested for the <b>Venire</b> ? _____  <b>Peremptory Challenges</b> in the selection of the Jurors:  Plaintiff (1)      _____      Defendant (1)      _____ Plaintiff (2)      _____      Defendant (2)      _____
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7	Number of <b>Alternate Jurors</b> to be impaneled? _____  <b>Peremptory Challenges</b> in the selection of the Alternate Juror(s):  Plaintiff (1)      _____      Defendant (1)      _____ Plaintiff (2)      _____      Defendant (2)      _____
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	Time Estimates	<i>Voir Dire</i> (If Jury Trial)	Opening Statement	Case in Chief	Closing Argument
8	Plaintiff (1)	_____ min _____ hr.	_____ min _____ hr	_____ hr _____ day	_____ min _____ hr
	Plaintiff (2)	_____ min _____ hr	_____ min _____ hr	_____ hr _____ day	_____ min _____ hr.
	Defendant (1)	_____ min _____ hr	_____ min _____ hr.	_____ hr _____ day	_____ min _____ hr
	Defendant (2)	_____ min _____ hr	_____ min _____ hr	_____ hr _____ day	_____ min _____ hr
	<b>Total Estimated Time for Trial:</b> _____ days/weeks				

9	When is the <b>Rule of Sequestration</b> invoked? <input type="checkbox"/> Before <i>voir dire</i> <input type="checkbox"/> Before opening <input type="checkbox"/> Not invoked
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10	<b>Court Reporter:</b> <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant <input type="checkbox"/> Shared <input type="checkbox"/> None <b>Interpreter:</b> <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant <input type="checkbox"/> Shared <input type="checkbox"/> None
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11	Are all <b>Exhibits</b> to be introduced and offered into evidence during trial pre-marked for identification with letters, or numbers for admission into evidence by stipulation, corresponding to the Exhibit Log given to the Trial Clerk?  Plaintiff (1): <input type="checkbox"/> Yes <input type="checkbox"/> No   If no, when? _____ Defendant (1): <input type="checkbox"/> Yes <input type="checkbox"/> No   If no, when? _____ Defendant (2): <input type="checkbox"/> Yes <input type="checkbox"/> No   If no, when? _____
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		<b>Witness List Filed?</b>	<b>Exhibit List Filed?</b>	<b>Expert List Filed?</b>	<b>All Lists in JPTS?</b>
12	Plaintiff (1):	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Defendant (1):	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Defendant (2):	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

13	<p>Have <b>all Demonstrative Aids</b>, charts, boards, illustrations, maps, diagrams and PowerPoint slides or presentations (to be used during Opening Statement or Trial) been pre-marked for identification only with letters corresponding to the Exhibit Log given to the Trial Clerk, exchanged or otherwise made available to opposing counsel to evaluate and review to allow for objections to be noted, brought to the Court's attention and ruled on <b>PRIOR</b> to the first day of trial?</p> <p><b><i>NOTE: DEMONSTRATIVE AIDS MAY NOT BE USED DURING OPENING STATEMENT WITHOUT AGREEMENT OR PRIOR COURT ORDER.</i></b></p> <p>Plaintiff (1):    <input type="checkbox"/> Yes   <input type="checkbox"/> No    If no, when? _____</p> <p>Defendant (1)    <input type="checkbox"/> Yes   <input type="checkbox"/> No    If no, when? _____</p> <p>Defendant (2):   <input type="checkbox"/> Yes   <input type="checkbox"/> No    If no, when? _____</p>
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14	<p>Have all <b>Rule 1.360 Examinations</b> been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what examination(s) are pending and the anticipated completion date? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
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15	<p>Have all <b>Motions to Amend Pleadings</b> been filed and heard? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <table style="width: 100%;"> <tr> <td style="width: 70%;"></td> <td style="text-align: center;"><u>Timely Filed?</u></td> </tr> <tr> <td>1. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>2. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>3. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> </table>		<u>Timely Filed?</u>	1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<u>Timely Filed?</u>								
1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								

16	<p>Has all <b>fact discovery</b> been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what <b>discovery</b> is pending and when it will be completed?</p> <p>_____</p> <p>_____</p> <p>_____</p>
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17	<p>Has all <b>expert discovery</b> been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what expert discovery is pending and when it will be completed? _____</p> <p>_____</p> <p>_____</p> <p>_____</p>
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18	<p>Have all <b>Dispositive Motions and Summary Judgment Motions</b> been filed and heard including but not limited to, the defense of “failure to state a cause of action” pursuant to Rule 1.140(h)(2)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <table style="width: 100%;"> <tr> <td style="width: 70%;"></td> <td style="text-align: center;"><u>Timely Filed?</u></td> </tr> <tr> <td>1. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>2. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>3. _____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> </table>		<u>Timely Filed?</u>	1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
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1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								

19	<p>Have all <b><i>Daubert</i></b> or other <b>Expert Witness Related Motions</b> been filed and heard?  <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <table style="width: 100%;"> <thead> <tr> <th style="width: 70%;"></th> <th style="width: 30%; text-align: center;"><u>Timely Filed?</u></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>2. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>3. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> </tbody> </table>		<u>Timely Filed?</u>	1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<u>Timely Filed?</u>								
1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								

20	<p>Have all <b><i>Northrup</i> Impeachment Materials</b> been identified, disclosed and exchanged?  <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will such materials be identified, disclosed and exchanged?          _____</p>
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21	<p>Have all <b>case specific Motions in <i>Limine</i></b> been filed and heard? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <table style="width: 100%;"> <thead> <tr> <th style="width: 70%;"></th> <th style="width: 30%; text-align: center;"><u>Timely Filed?</u></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>2. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>3. _____</td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> </tbody> </table>		<u>Timely Filed?</u>	1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<u>Timely Filed?</u>								
1. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No								

22	<p>Have all <b>Deposition Transcripts, Answers to Interrogatories, and Responses to Request(s) for Admissions</b> been filed with the Court if they are to be published during the case in chief or used for impeachment?</p> <p>Plaintiff (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p> <p>Defendant (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p>
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23	<p>Have all <b>Deposition Designations, Counter Designations, objections and completeness concerns</b> been timely exchanged in writing? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will such <b>deposition designations, objections, and completeness concerns</b> be exchanged? _____</p>
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24	<p>Have all <b>Stipulations, Admissions, Agreements and Waivers</b> been reduced to writing and incorporated in the Joint Pretrial Stipulation? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will they be prepared and filed? _____</p> <p><b><i>NOTE: STIPULATIONS, ADMISSIONS, AGREEMENTS AND WAIVERS MUST BE IN WRITING IF SEEKING COURT ENFORCEMENT.</i></b></p>
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25	<p>Are there any <b>other pending motion(s), special provisions, accommodations, or concerns</b> not previously identified above? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, identify any such <b>pending motion(s), special provisions, accommodations, or concerns</b>:</p> <table style="width: 100%;"> <tr> <td style="width: 70%;">1. _____</td> <td style="width: 30%; text-align: center;"> <u>Timely Filed?</u>  <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> <tr> <td>2. _____</td> <td style="text-align: center;"> <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> <tr> <td>3. _____</td> <td style="text-align: center;"> <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> </table>	1. _____	<u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
1. _____	<u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No						
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						

26	<p>Are there any pending written <b>Request(s) for Judicial Notice</b> with timely notice to adverse parties, proof of which is filed with the Court? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, identify any such pending Request(s):</p> <table style="width: 100%;"> <tr> <td style="width: 70%;">1. _____</td> <td style="width: 30%; text-align: center;"> <u>Timely Filed?</u>  <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> <tr> <td>2. _____</td> <td style="text-align: center;"> <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> <tr> <td>3. _____</td> <td style="text-align: center;"> <input type="checkbox"/> Yes <input type="checkbox"/> No         </td> </tr> </table> <p><b><i>NOTE: ANY PARTY REQUESTING JUDICIAL NOTICE MUST FOLLOW THE EVIDENCE CODE, Section 90.201-90.207, Florida Statutes.</i></b></p>	1. _____	<u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
1. _____	<u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No						
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						

27	<p>Do you intend to use the Court’s <b>Courtroom Technology</b> and/or <b>Audio/Video</b> equipment during the trial? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you intend to use the Court’s <b>Courtroom Technology</b> and/or <b>Audio/Video</b> equipment have you:</p> <ol style="list-style-type: none"> <li>1. Reviewed the Court Technology page and request form on the Circuit’s webpage at: <a href="https://flcourts18.org/court-programs/information-technology/">https://flcourts18.org/court-programs/information-technology/</a> ? Plaintiff <input type="checkbox"/> Yes <input type="checkbox"/> No Defendant <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li>2. Met and conferred to identify any fact and/or expert witnesses who will be testifying via Microsoft Teams? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> </ol> <p>If yes, are there any Motions(s)/Objection(s) to be heard related to such Teams testimony (“No” constitutes a stipulation/consent to the same)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
28	<p>Do the Parties understand that the Court expects them to <b>disclose</b> the next day’s <b>witnesses</b> at the end of each court day? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
29	<p><b>Trial Briefs</b> are not required, however, do the parties understand that if you choose to submit them, courtesy hard <i>and</i> electronic copies must be delivered to the Judge’s chambers at least <b>three (3) business days</b> before trial to allow time for review? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
30	<p>Have you reviewed and familiarized yourselves with the Judge’s <b>Procedures, Guidelines</b> and “<b>Trial Conduct and Courtroom Decorum Policy</b>”, all of which can be found on the Court’s website, <a href="https://flcourts18.org/attorney-citizen-resources/attorney-resources/">https://flcourts18.org/attorney-citizen-resources/attorney-resources/</a> ?  <input type="checkbox"/> Yes <input type="checkbox"/> No</p>

***[Signature Block and Certification for Attorneys Follows on Next Page]***



**ATTORNEY SIGNATURES AND CERTIFICATION**

**By our signatures below, we have read and acknowledge the foregoing and understand duties, responsibilities and obligations related to preparing for and conducting the trial of the above-styled cause. We understand that we must notify the Court immediately upon settlement of the case.**

Signatures:

Attorney(s) for Plaintiff(s)

Signature \_\_\_\_\_ for \_\_\_\_\_ (1)  
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ for \_\_\_\_\_ (2)  
Printed Name \_\_\_\_\_

Attorney(s) for Defendant(s)

Signature \_\_\_\_\_ for \_\_\_\_\_ (1)  
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ for \_\_\_\_\_ (2)  
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ for \_\_\_\_\_ (3)  
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ for \_\_\_\_\_ (4)  
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ for \_\_\_\_\_ (5)  
Printed Name \_\_\_\_\_