ChecklistGuro

Litigation Support Case Management Checklist Template 2026

Initial Case Intake & Conflict Check

Procedures for verifying new matter details, performing conflict of interest searches, and formally opening the litigation file.

Client Name

Write something...

Adverse Party Name

Write something...

Date of Incident/Matter Commencement

Enter date...

Conflict Check Status

- [ ] No Conflict Found
- [ ] Potential Conflict Identified
- [ ] Conflict Confirmed - Matter Declined

Involved Parties/Entities

- [ ] Plaintiff
- [ ] Defendant
- [ ] Third-Party Defendant
- [ ] Co-Defendant

Initial Intake Documentation

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Brief Case Summary

Write something...

Conflict Clearance Authorization

Case Strategy & Litigation Planning

Defining the scope of litigation, identifying legal theories, establishing milestones, and setting the litigation budget.

Case Name/Matter ID

Write something...

Litigation Strategy Overview

Write something...

Statute of Limitations Deadline

Enter date...

Case Priority Level

- [ ] Low
- [ ] Medium
- [ ] High
- [ ] Urgent/Critical

Estimated Litigation Budget

Enter a number...

Initial Strategy Document

Upload File

Primary Legal Theories

- [ ] Breach of Contract
- [ ] Negligence
- [ ] Fraud/Misrepresentation
- [ ] Regulatory Violation
- [ ] Other

Discovery Management & E-Discovery

Tracking requests for production, managing document preservation (legal holds), and overseeing the collection and review of electronic evidence.

Legal Hold Issued Date

Enter date...

Discovery Types Involved

- [ ] Interrogatories
- [ ] Requests for Production (RFP)
- [ ] Requests for Admission (RFA)
- [ ] Depositions
- [ ] Subpoenas

Document Production Log

Upload File

E-Discovery Protocol Summary

Write something...

Data Custodian Status

- [ ] Identified
- [ ] Notified
- [ ] Data Collected
- [ ] Review Complete

Discovery Deadline

Enter date...

Evidence & Exhibit Management

Organizing physical and digital exhibits, maintaining a chain of custody, and preparing documents for trial or deposition use.

Exhibit ID Number

Write something...

Exhibit Description

Write something...

Evidence Type

- [ ] Document
- [ ] Photograph
- [ ] Digital Media (Video/Audio)
- [ ] Physical Object
- [ ] Email/Correspondence

Date of Evidence Creation

Enter date...

Upload Digital Evidence

Upload File

Chain of Custody Participants

- [ ] Lead Attorney
- [ ] Paralegal
- [ ] Investigator
- [ ] Clerk

Chain of Custody Verification

Witness Identification & Preparation

Cataloging key witnesses, managing deposition schedules, and coordinating expert witness testimony and retainer agreements.

Witness Name

Write something...

Witness Type

- [ ] Fact Witness
- [ ] Expert Witness
- [ ] Character Witness
- [ ] Expert/Technical Witness

Deposition Scheduled Date

Enter date...

Preparation Tasks Completed

- [ ] Contact Initiated
- [ ] Subpoena Served
- [ ] Pre-Deposition Interview Conducted
- [ ] Documents Provided for Review

Witness Statement/Affidavit

Upload File

Witness Summary & Key Testimony Notes

Write something...

Deposition & Hearing Coordination

Scheduling deposition dates, managing court reporter logistics, preparing deposition outlines, and coordinating transcript deliveries.

Scheduled Date

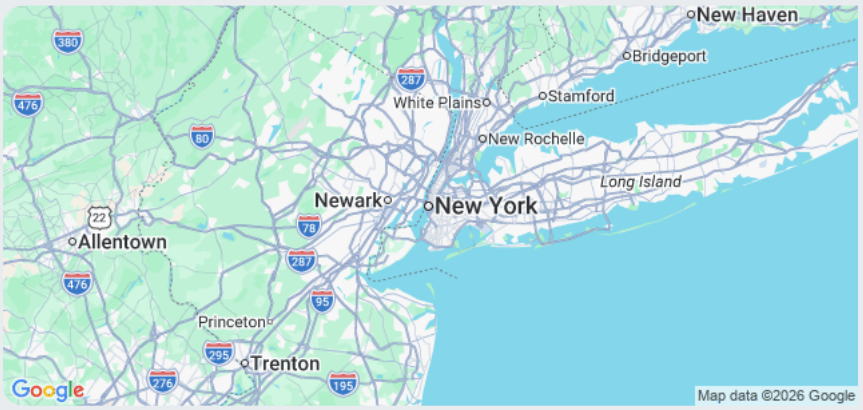
Enter date...

Scheduled Time

Enter time...

Deposition/Hearing Venue

Set My Current Location



Type of Proceeding

- [ ] Deposition
- [ ] Evidentiary Hearing
- [ ] Motion Hearing
- [ ] Trial

Required Attendees

- [ ] Opposing Counsel
- [ ] Court Reporter
- [ ] Videographer
- [ ] Expert Witness
- [ ] Client

Deposition Outline/Notice

Upload File

Key Issues to Address

Write something...

Motion Practice & Filing Deadlines

Tracking deadlines for motions to compel, summary judgment motions, and ensuring all court filings comply with local rules.

Motion Name/Description

Write something...

Filing Deadline

Enter date...

Motion Type

- [ ] Motion to Dismiss
- [ ] Motion for Summary Judgment
- [ ] Motion to Compel
- [ ] Motion in Limine
- [ ] Other

Draft Motion/Supporting Documents

Upload File

Opposition/Reply Summary

Write something...

Required Service Methods

- [ ] Email Service
- [ ] Certified Mail
- [ ] Personal Service
- [ ] Electronic Filing System (EFS)

Trial Preparation & Courtroom Readiness

Finalizing trial briefs, organizing trial binders, coordinating courtroom technology, and managing the trial calendar.

Trial Start Date

Enter date...

Trial Exhibit Checklist

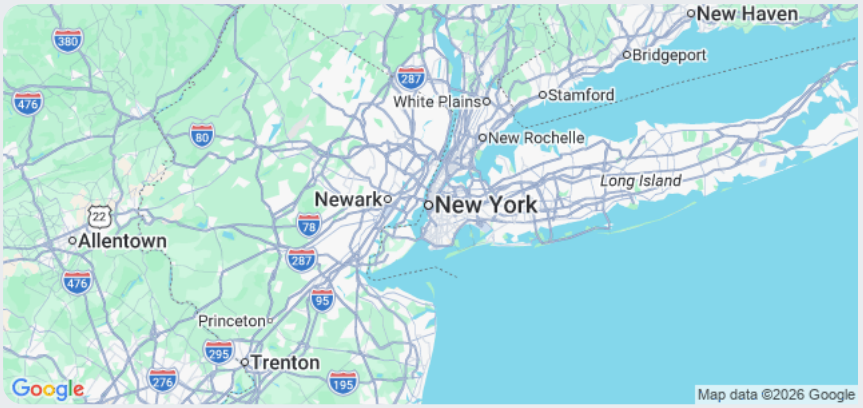
- [ ] Witness List Finalized
- [ ] Exhibits Indexed
- [ ] Deposition Summaries Ready
- [ ] Jury Instructions Prepared
- [ ] Trial Notebook Completed

Trial Brief Upload

Upload File

Courtroom Assignment

Set My Current Location



Trial Strategy Notes

Write something...

Lead Counsel Approval

Settlement Negotiation & Mediation Tracking

Managing mediation schedules, documenting settlement offers/counter-offers, and preparing settlement agreement drafts.

Mediation Date

Enter date...

Mediation Status

- [ ] Scheduled
- [ ] In Progress
- [ ] Settled
- [ ] Unsuccessful
- [ ] Postponed

Settlement Offer Amount

Write something...

Negotiation Notes & Summary

Write something...

Settlement Agreement Draft

Upload File

Parties Involved in Negotiation

- [ ] Plaintiff Counsel
- [ ] Defense Counsel
- [ ] Mediator
- [ ] Insurance Adjuster

Final Approval Signature

Post-Litigation Case Closure

Finalizing billing, archiving case files according to retention policies, and conducting a post-matter review for process improvement.

Date of Final Disposition

Enter date...

Case Outcome Status

- [ ] Settled
- [ ] Dismissed
- [ ] Judgment Rendered
- [ ] Appealed

Post-Matter Review Summary

Write something...

Archived Assets

- [ ] Physical Files
- [ ] Digital Evidence
- [ ] Correspondence
- [ ] Financial Records

Final Order/Settlement Agreement

Upload File

Closing Attorney Approval

Previous Next Finish

Generate Sample Report