



# Product Liability Case Management Checklist Template

## Initial Case Assessment

Tasks related to the initial review and evaluation of the product liability case.

### Date of Incident

Enter date...

### Plaintiff's Age at Time of Incident

Enter a number...

### Type of Product Involved

- ☐ Automotive
- ☐ Consumer Electronics
- ☐ Medical Device
- ☐ Food Product
- ☐ Other

### Brief Description of Incident

Write something...

### Severity of Injury

- ☐ Minor
- ☐ Moderate
- ☐ Severe

### Initial Police Report (if applicable)

 Upload File

## Investigation & Evidence Gathering

Activities focused on collecting and preserving relevant evidence.

### Product Photos/Videos

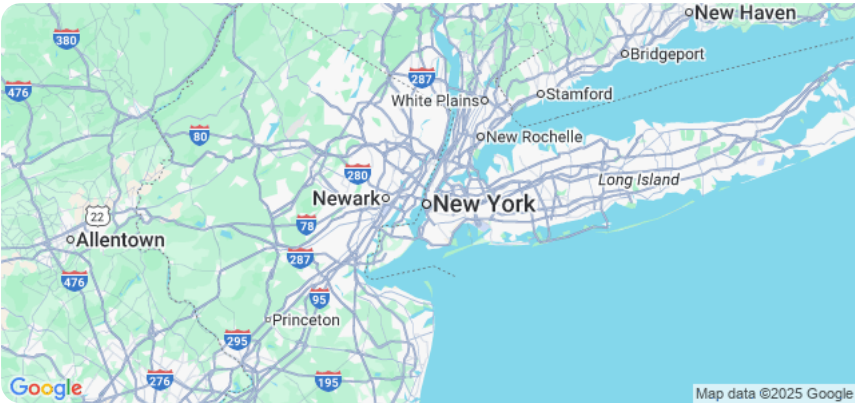
 Upload File

### Detailed Description of Incident

Write something...

Incident Location Coordinates

 Set My Current Location



Date of Incident

Enter date...

Quantity of Product Involved

Enter a number...

Product Defect Type (Select all that apply)

- ☐ Design Defect
- ☐ Manufacturing Defect
- ☐ Marketing Defect
- ☐ Warning Defect

Witness Statements (if any)

Write something...

# Expert Witness Management

Tasks concerning the identification, retention, and coordination of expert witnesses.

## Expert Witness Name

Write something...

## Expert Witness Contact Information

Write something...

## Area of Expertise

- ☐ Engineering
- ☐ Medical
- ☐ Product Design
- ☐ Toxicology
- ☐ Other

## Hourly Rate

Enter a number...

## Retainer Agreement Date

Enter date...

## Retainer Agreement Document

 Upload File

### Summary of Expert's Opinion/Report

Write something...

## Legal Research & Strategy

Activities focused on researching legal precedents and developing a case strategy.

### Summary of Relevant Statutes & Case Law

Write something...

### Primary Legal Theories

- ☐ Negligence
- ☐ Strict Liability
- ☐ Breach of Warranty
- ☐ Product Misrepresentation

### Number of Similar Cases Reviewed

Enter a number...

### Analysis of Precedent Setting Cases

Write something...

### Potential Defenses

- ☐ Assumption of Risk
- ☐ Misuse of Product
- ☐ State of the Art Defense
- ☐ Compliance with Regulations

## Document Management & Organization

Tasks related to organizing, managing, and securing all case documents.

### Total Documents Uploaded

Enter a number...

### Document Storage Method

- ☐ Cloud Storage
- ☐ Local Server
- ☐ Hybrid

### Last Document Review Date

Enter date...

### Document Review Notes

Write something...

### Key Document Scan (e.g., Product Manual)

 Upload File

### Document Security Level

- ☐ Public
- ☐ Confidential
- ☐ Restricted

### Number of Digital Scans Completed

Enter a number...

## Plaintiff Communications & Expectations

Activities focused on maintaining communication with the plaintiff and managing their expectations.

### Date of Initial Communication

Enter date...

### Summary of Initial Communication (Plaintiff's Concerns)

Write something...

### Communication Method

- ☐ Phone Call
- ☐ Email
- ☐ Letter
- ☐ In-Person Meeting

### Frequency of Updates (e.g., weekly, bi-weekly)

Enter a number...

### Summary of Recent Communication (Plaintiff)

Write something...

### Plaintiff Understanding of Process

- ☐ Fully understands process
- ☐ Partially understands process
- ☐ Limited understanding of process

### Notes on Plaintiff Expectations

Write something...

## Regulatory Compliance & Reporting

Tasks related to ensuring compliance with relevant regulations and reporting requirements.



### Initial Regulatory Review Date

Enter date...

### Applicable Regulations (Select all that apply)

- ☐ FDA Regulations
- ☐ Consumer Product Safety Act
- ☐ State-Specific Regulations
- ☐ Industry Standards (e.g., ASTM)

### Summary of Regulatory Requirements Analyzed

Write something...

### Quantity of Products Affected (Estimate)

Enter a number...

### Supporting Documentation for Regulatory Analysis (e.g., internal memos, legal opinions)

 Upload File

### Reporting Obligations Met?

- ☐ Yes
- ☐ No
- ☐ Pending

### Date of Last Regulatory Report Submission

Enter date...

## Settlement Negotiations & Mediation

Activities focused on settlement negotiations and potential mediation efforts.

### Initial Settlement Demand Received Date

Enter date...

### Initial Settlement Demand Amount

Enter a number...

### Negotiation Strategy (Initial)

- ☐ Aggressive
- ☐ Moderate
- ☐ Collaborative

### Summary of Initial Negotiation Meeting

Write something...

### Counteroffer Amount (Plaintiff)

Enter a number...

### Counteroffer Amount (Defendant)

Enter a number...

### Mediation Scheduled?

☐ Yes

☐ No

### Notes from Mediation Session

Write something...

## Trial Preparation & Strategy

Tasks related to preparing for trial and developing a trial strategy.

### Key Witness Preparation Notes

Write something...

### Exhibit List (Latest Version)

 Upload File

### Potential Exhibits to Use at Trial

- ☐ Documentary Evidence
- ☐ Photographic Evidence
- ☐ Video Recordings
- ☐ Expert Testimony
- ☐ Physical Demonstrations

### Mock Trial Date (if applicable)

Enter date...

### Anticipated Defenses and Rebuttals

Write something...

### Jury Instructions – Key Areas of Focus

- ☐ Product Design
- ☐ Warnings and Instructions
- ☐ Manufacturing Defects
- ☐ Negligence

### Estimated Trial Length (Days)

Enter a number...

## Post-Trial Procedures & Appeals

Activities focused on post-trial procedures and potential appeals.

### Appeal Filing Deadline

Enter date...

### Summary of Post-Trial Motions Filed

Write something...

### Appeal Filed? (Yes/No)

☐ Yes

☐ No

### Appeal Hearing Date (if applicable)

Enter date...

### Summary of Appeal Arguments Presented

Write something...

### Appeal Costs Incurred

Enter a number...

### Uploaded Supporting Documents (e.g., appellate briefs)

 Upload File

**Outcome of Appeal?**

- ☐ Affirmed
- ☐ Reversed
- ☐ Modified
- ☐ Dismissed