

Case Summary Worksheet

A Plain-Language Tool for Organizing Case Details

A **Case Summary** is a concise, one-page overview of your entire legal matter. It is an invaluable tool for quickly briefing yourself, a new advisor, or a judge on the core facts and issues of your case. Use this worksheet to distill your case down to its most essential elements.

Header (Essential Information)

Field	Guidance
Case Number	The unique number assigned to your case by the court.
Court	The full name of the court where the case is filed.
Parties	List the full names of the main parties (e.g., Plaintiff: John Doe, Defendant: Jane Smith).
Date	The date you are completing this summary.

Summary (The Big Picture)

Write a short overview (5–7 sentences) of the situation. This should be a neutral statement of the facts that led to the lawsuit.

- **Goal:** To provide context and a brief history of the dispute.
- **Example:** “This case involves a dispute over the terms of a lease agreement signed on [Date]. The main events occurred between [Start Date] and [End Date], resulting in a claim for [Type of Claim] by the [Plaintiff/Defendant].”

Issues (The Disputed Points)

List the key points that the court must decide. These are the legal questions at the heart of the case.

- **Goal:** Identify the core legal questions.
- **Example:**
 - Did the defendant breach the contract?
 - What is the appropriate amount of child support under state guidelines?
 - Was the search conducted by police lawful under the Fourth Amendment?

Timeline (The Chronology)

Create a brief, chronological list of the most important events. This should align with your full Case Timeline.

Date	Event

Request (The Ask)

State clearly and concisely what action you are asking the court or agency to take. This is your desired outcome.

- **Goal:** Be specific about the relief you seek.
- **Example:** “I respectfully request dismissal of the claim against me and reimbursement of my court costs.”
OR “I request that the court order joint legal and physical custody of the minor child.”

Signature

Your signature confirms that you have reviewed and prepared this summary.

- **Signature:** Sign the document.
 - **Printed Name:** Print your name below your signature.
 - **Date:** Write the date you signed the document.
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Important Notice:

This worksheet is for educational and clerical support only. We do not provide legal advice, legal interpretation, or attorney services, and we cannot represent anyone in court. Adjust sections as needed for your specific situation.
