



ONTARIO
Superior Court of Justice - Family Court

Court file # _____
Date _____
Judge _____

RE: _____

APPLICANT _____ COUNSEL _____

Contact #'s if unrepresented

work _____ home _____
cell _____ fax _____ email _____

RESPONDENT _____ COUNSEL _____

Contact #'s if unrepresented

work _____ home _____
cell _____ fax _____ email _____

CHILDREN'S LAWYER _____ COUNSEL _____

TRIAL MANAGEMENT ENDORSEMENT

[1] Preliminary Matters

- Counsel retained
- Disclosure completed
- Assessments completed
- Valuations completed
- Settlement conference held
- Child protection case
- All parents served No Yes
- Indian status No Yes
- If yes, band served No Yes
- Region/County has an interest No Yes
- If yes, who represents it? _____

[2] Issues

1.	5.
2.	6.
3.	7.
4.	8.

[3] a) Summary

- i) From paragraph 13 – Trial record to be filed _____
- ii) From paragraph 16 – Trial in the sittings starting on _____
- iii) From paragraph 17 – Total length of time _____
- iv) Date for next pre-trial _____

b) If a courtroom was available at another courthouse for your trial, would you consider moving your trial? No Yes

[4] Pleadings

Amendment needed? No Yes If yes, which party? _____
Date to amend _____
Financial statements updated? No Yes

[5] Admissions (*summarize or attach list of admitted facts*)

Have requests to admit been served? No Yes

If no, time limits for: Applicant _____ Response by _____

Respondent _____ Response by _____

Statement of agreed facts (SAF) to be served and filed by (*party*) _____

by (*date*) _____ SAF must be put into or with trial record.

[6] Exhibits Proposed

All documentary evidence to be relied upon at trial will be served by the following dates:

Applicant _____ Respondent _____

Proposed exhibits **not** to be coil bound as there may be questions of admissibility by other party or court.

Reports or business records to be relied on? No Yes

If yes, may they be introduced without calling of record keeper? No Yes

Medical reports with notice of intent served? No Yes

If no, by what date? _____

[7] Presentation at Trial

Order of presentation if multiple parties or Children’s Lawyer

Written opening statements or oral

If written, to be served by: Applicant _____

Respondent _____

Will written opening statements be put into trial record? No Yes

If not, when will written opening statement be available for judge? _____

Draft order to be provided at beginning of trial

b) Special arrangements re witnesses

- i. Amplification devices _____
- ii. Interpreters (provided by court or party?) _____
- iii. Wheel chair access _____
- iv. Judges' order as incarcerated _____

c) Will any witnesses' evidence be given in chief by affidavit No Yes

If so, affidavits for applicant will be served by _____

Affidavits for respondent will be served by _____

Respondent to vet affidavit for applicant by _____

Applicant to vet affidavit for respondent by _____

d) **Experts – APPLICANT’S EXPERTS**

Name of Expert	Report served on Date:	Witness to be qualified to give an opinion on: (Be specific)	Qualifications admitted <input type="checkbox"/> No <input type="checkbox"/> Yes
1)			Or to advise by
			Date:
2)			
			Date:

e) **Experts – RESPONDENT’S EXPERTS**

Name of Expert	Report served on	Witness to be qualified to give an opinion on: (Be specific)	Qualifications admitted <input type="checkbox"/> No <input type="checkbox"/> Yes
1)			Or to advise by
			Date:
2)			
			Date:

f) By naming a witness in a witness list, the party undertakes to make the witness available to the other party without summons even if the party decides not to call the witness.

[9] Children’s Evidence

Is there any evidence being sought from a child? No Yes Age _____
How will the evidence be introduced?

- (a) Statement of agreed facts
- (b) Through Children’s Lawyer
- (c) Khan *voir dire*
- (d) Other (specify) _____

[10] Other Issues to flag for trial scheduling purposes

[11] Any Special Equipment Needs (audio visual, screens, real time reporting etc)

If yes, court support notified No Yes

[12] Possible Problems to Flag for Trial Judge

Evidentiary issues _____

Legal issues _____

Other _____

[13] Trial Record already served and filed? No Yes

If not: Applicant to serve and file by _____

Respondent to serve and file by _____

[14] Follow Up TMC Required? No Yes Purpose: _____

[15] Case books to be filed by the following dates:

Applicant _____ Respondent _____

[16] If all sections of this trial management endorsement have been fully completed and if counsel and parties are agreed as to trial being heard in the sittings starting on _____ counsel or parties need not attend trial scheduling court and shall be put directly on trial list. Counsel or parties shall obtain a date for an “exit pre-trial” (settlement conference close to the trial date) from the courtroom registrar or trial coordinator.

[17] Trial Information

Total trial time: _____

Urgency and why: _____

[18] It is ordered that:

- Parties shall comply with directions and dates set out above. Consent changes may be requested by motion form (14B).
- There shall be no further motions without permission obtained from the case management judge.
- No exhibits may be relied on at trial other than those disclosed as above **without a court order** obtained from the case management judge or trial judge.
- No witnesses shall be called other than the witnesses on the witness list as outlined above unless a court order is obtained from the case management judge or the trial judge.
- Any changes requested regarding scheduling of trial or expanded time required for trial – **must attend trial scheduling court.**

A copy of this endorsement must be put into the trial record, as it is an order relating to the trial. (See rule 23(1), para. 6.)

If any other endorsements in the continuing record have not been turned into formal orders, consider whether a copy of those endorsements should go into the trial record.

Rule 23(1) para. 5 requires temporary orders relating to a matter still in dispute to be put into the trial record.

Parties informed

- To attend at Trial Coordinator's office for a date for exit pre-trial**
- To inform Trial Coordinator of any changes in address or phone # or any change in representation**
- To call Trial Coordinator if they do not hear from the Trial Office at least one week before the trial date**
- If a party does not attend, an order may be made in the party's absence**
- Failure to comply with the terms of this endorsement could result in cost consequences**

Judge's signature