

**Form 14(a) – Joint Report: Commercial Case [“Clean” version]**

In the Superior Court of Arizona  
\_\_\_\_\_ County

Plaintiffs	)	Case number _____
	)	
v	)	<b>Joint Report</b>
	)	<i>(Commercial case)</i>
Defendants	)	Assigned to:
	)	

The parties signing below certify that they have conferred about the matters set forth in Rules 8.1(f) and 16(d), and that this case is not subject to the mandatory arbitration provisions of Rule 72. With regard to matters upon which the parties could not agree, they have set forth their positions separately in item 14 below. The parties are submitting a Proposed Scheduling Order with this Joint Report. Each date in the Joint Report and in the Proposed Scheduling Order includes a calendar month, day, and year.

1. **Brief description of the case:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- If a claimant is seeking other than monetary damages, specify the relief sought \_\_\_\_\_  
\_\_\_\_\_.
- This is a commercial case under Rule 8.1 because (refer to the specific provisions of Rule 8.1 that apply): \_\_\_\_\_.

2. **Current case status:** Every defendant has been served or dismissed.  yes  no

- Every party who has not been defaulted has filed a responsive pleading.  yes  no
- Explanation of a “no” response to either of the above statements: \_\_\_\_\_  
\_\_\_\_\_.

3. **Amendments:** A party anticipates filing an amendment to a pleading that will add a new party to the case:  yes  no

4. **Special case management:** Special case management procedures are appropriate:  yes  no  
If “yes,” the following case management procedures are appropriate because: \_\_\_\_\_  
\_\_\_\_\_.

5. **Commercial case management [Rule 8.1(f)]:**

a. **Approximate Amount in Controversy** \$ \_\_\_\_\_

b. **Anticipated Areas of Expert Testimony (not binding):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**c. Electronically Stored Information**

The parties do not expect Electronically Stored Information (“ESI”) to be at issue in the case.

The parties do expect ESI to be at issue in the case.

Have the parties reached an agreement regarding the discovery of ESI?  yes  no

If yes, have the parties filed a stipulated order?  yes  no

Do the parties currently have disputes or anticipate particular disputes over ESI?  
 yes  no

If yes, please describe the dispute(s):

**d. Privilege Issues and Protective Order**

Have the parties reached an agreement regarding the inadvertent production of privileged material pursuant to Rule 502 of the Rules of Evidence?  yes  no

If so, have the parties filed a stipulated order?  yes  no

Have any issues arisen or do you expect any issues to arise regarding claims of privilege or protection of trial preparation materials pursuant to Rule 26.1(f)?  yes  no

If so, please describe the issue(s):

Do the parties believe that a protective order is necessary?  yes  no

If so, have the parties filed a stipulated protective order?  yes  no

**6. Settlement:** The parties agree to engage in settlement discussions with  a settlement judge assigned by the court, or  a private mediator.

The parties will be ready for a settlement conference or a private mediation by \_\_\_\_\_.

If the parties will not engage in a settlement conference or a private mediation, state the reason(s): \_\_\_\_\_.

**7. Readiness:** This case will be ready for trial by \_\_\_\_\_.

**8. Jury:** A trial by jury is demanded.  yes  no

9. **Length of trial:** The estimated length of trial is \_\_\_\_ days.

10. **Summary jury:** The parties agree to a summary jury trial.  yes  no

11. **Preference:** This case is entitled to a preference for trial pursuant to the following statute or rule: \_\_\_\_\_.

12. **Special requirements:**  At a pretrial conference or  at trial, a party will require  
 disability accommodations (specify) \_\_\_\_\_  
 an interpreter (specify language) \_\_\_\_\_

13. **Other matters:** Other matters that the parties wish to bring to the court's attention that may affect management of this case: \_\_\_\_\_  
\_\_\_\_\_.

14. **Items upon which the parties do not agree:** The parties were unable in good faith to agree upon the following items, and the position of each party as to each item is as follows:  
\_\_\_\_\_  
\_\_\_\_\_.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
For Plaintiff

\_\_\_\_\_  
For Defendant