

**PT PART**  
**RULES FOR THE PRE-TRIAL CONFERENCE (PT) PART**  
**FOR SETTLEMENT CONFERENCES AND TRIAL COMMENCEMENT**

Shortly after the filing of a Note of Issue, counsel for plaintiff must complete and file a “Confidential Settlement Conference Worksheet” which (when completed) will provide the court with all information necessary to conduct a meaningful settlement conference. The worksheet also provides a check-off for the documents which are relevant to the issues of liability and damages.

Each attorney attending the settlement conference must bring a copy of all documents relevant to the issues of liability and damages and be fully familiar with every aspect of the case and be fully authorized to engage in meaningful settlement negotiations.

The worksheet must be filed with the Clerk in Room 810. Copies of the form worksheet can be obtained either on line from OCA Court website or from the Clerk in Room 810.

---

**Caveat:**

- (1) If the worksheet is not sufficiently completed and filed or if the attorney attending is not prepared, it may result in an adjournment and/or multiple unnecessary appearances.
- (2) If the court senses that settlement negotiations are not expeditiously being conducted in good faith, the court pursuant to the Uniform Rules for Trial Courts (22 NYCRR §202.26[e], “may order parties, representative of parties, representative of insurance carriers [and others] to also attend in person or telephonically at the settlement conference.”
- (3) Since a note of issue (with a certificate of readiness) has been filed, the court has the discretion to send the case for immediate jury selection and trial; and will do so if settlement negotiations are not expeditiously conducted in good faith.
- (4) The Court’s “Trial Rules” are published on the OCA website for Part IA-21.