

# Case Management Statement and Case Management Conferences

Under the Case Management Program (CMP), all cases are scheduled for a Case Management Conference approximately six months after filing. **You are required to file a *Case Management Statement (CM-110)* no later than 15 calendar days before your Case Management Conference.** This guide shows how to complete that form.

Different counties have different local practices. **In Sacramento**, the Case Management Program only applies to *unlimited civil cases* (amount demanded exceeds \$35,000). Check your local county court to determine whether your case is required to follow the CMP rules.

## Templates and Forms

[Case Management Statement \(CM-110\)](https://selfhelp.courts.ca.gov/jcc-form/CM-110) (<https://selfhelp.courts.ca.gov/jcc-form/CM-110>)

There is no fee for filing a Case Management Statement.

**When is the Case Management Conference?** The Court usually sets the Case Management Conference date when the case is filed and provides the plaintiff with a Notice of Case Assignment and Case Management Conference. The plaintiff is required to serve this on all defendants along with the Complaint. (At the time of this update, the first Case Management Conference in new cases is being scheduled for 11 months after the case is filed because the court is significantly backlogged.)

**In Sacramento:** Limited civil cases (amount demanded is \$35,000 or less) are excluded from the Sacramento County Superior Court's Civil Case Management program. [Sacramento County Local Rule 2.21](http://saccourt.ca.gov/local-rules/docs/chapter-02.pdf) (<http://saccourt.ca.gov/local-rules/docs/chapter-02.pdf>). See our guide on completing the [Limited Civil Case Status Memorandum](https://saclaw.org/resource_library/limited-civil-case-status-memorandum/) ([https://saclaw.org/resource\\_library/limited-civil-case-status-memorandum/](https://saclaw.org/resource_library/limited-civil-case-status-memorandum/)) for more information on that process.

**In other counties:** check your county's local rules to see if you are required to participate in the Case Management Program.

If you are a defendant and did not receive the Notice, check the court's [Case Portal](https://prod-portal-sacramento-ca.journaltech.com/public-portal/) (<https://prod-portal-sacramento-ca.journaltech.com/public-portal/>). The Notice of Case Assignment and Case Management Conference will be one of the earliest documents in the "Document Download" list. You can download that, and any other documents, for free.

The Court may call for more than one Case Management Conference during the course of a lawsuit.

**Where is the Case Management Conference?** In Sacramento, specific departments hold the Case

Management Conference (currently Departments 38 and 43). These procedures and departments change from time to time. For current information, check the court's [Case Management Program web page](https://www.saccourt.ca.gov/civil/case-management-program.aspx) (<https://www.saccourt.ca.gov/civil/case-management-program.aspx>).

In Sacramento, parties are permitted to attend remotely via Zoom or telephone, unless the court orders you to appear in person. In other counties, check your local court to determine where the conference is held and whether and how you can appear remotely.

**What happens at a Case Management Conference?** The conference is related to status and scheduling. For instance, whether all parties have been served and answered, what discovery is needed, and when the parties will be ready for trial. *No other matters will be discussed.* Motions related to other matters are usually filed and heard in the Law and Motion department.

**Free Video:** [Completing Your Case Management Statement](https://www.saclaw.org/resource_library/case-management-statement/) ([https://www.saclaw.org/resource\\_library/case-management-statement/](https://www.saclaw.org/resource_library/case-management-statement/)) [↑](https://saclaw.org/video-library/completing-your-case-management-statement-in-sacramento-county-superior-court/) (<https://saclaw.org/video-library/completing-your-case-management-statement-in-sacramento-county-superior-court/>).

This guide goes into detail about how to answer the different questions, such as questions about whether you request a jury trial, what the different options for Alternative Dispute Resolution are, and how to estimate the length of trial you expect.

**Tentative Rulings: Your conference may be canceled.** If the Case Management Statements show that the case is progressing normally, the judge usually cancels the in-person hearing. The Court publishes tentative Case Management Orders **the court day before** the scheduled Case Management Conference, which may state that the conference is not necessary and is canceled.

Access these Tentative Rulings on the [Court's website](https://www.saccourt.ca.gov/indexes/new-portal-info.aspx) (<https://www.saccourt.ca.gov/indexes/new-portal-info.aspx>) at after 2:00 p.m. **the court day before** the Case Management Conference to determine if you need to make an appearance. Search for your case, then view the documents in the case to read the tentative ruling.

## Step-by-Step Instructions for Case Management Statement

### 1. Complete the Necessary Forms

The Judicial Council form commonly used in this procedure is:

- [Case Management Statement \(CM-110\)](http://www.courts.ca.gov/documents/cm110.pdf) (<http://www.courts.ca.gov/documents/cm110.pdf>)

A sample filled-in form with instructions is available at the end of this Guide.

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## 2. Completing Paragraph 10c of the Case Management Statement (Alternative Dispute Resolution)

You may find these definitions helpful in deciding which, if any, Alternative Dispute Resolution process you wish to participate in:

**Mediation:** A process in which people that are having a dispute are helped by a neutral third person (a Mediator) to communicate so they can reach a settlement acceptable to both. Mediation seeks a middle ground, and is often used when the parties will need to have contact in the future.

**Settlement Conference:** The parties and their attorneys meet with a settlement judge who hears both sides and tries to help them reach a compromise. The judge cannot make any decisions regarding the outcome, but will listen to each side, giving his or her critique and advising what they would be likely to decide in court. In Sacramento County settlement conferences are mandatory two weeks before trial; however, parties may elect to have an earlier settlement conference in order to avail themselves of the judge's insight at an earlier stage of the process.

**Neutral Evaluation:** A neutral third party (an experienced individual, usually an attorney) issues an opinion on the issues he or she is asked to evaluate by the parties. An objective evaluation by a knowledgeable outsider can sometimes move parties away from unrealistic positions, or at least provide them with more insight into their cases' strengths and weaknesses. This opinion has no effect on the case except for providing information useful for negotiation.

**Non-binding Judicial Arbitration:** A neutral third party Arbitrator, provided by the court, renders an opinion on the case. The Arbitration Award can be rejected and if so, the case will continue on to trial.

**Binding Private Arbitration:** The parties agree to hire a third party Arbitrator, and for the Arbitrator's decision to be final, and enforceable in the courts.

## 3. Service of Documents by Mail on All Parties

Choose a server (person over 18 who is not a party) to mail the Case Management Statement to the other party(s).

Make one copy of your Case Management Statement for each other party.

Fill out a [Proof of Service by Mail \(POS-030\)](http://www.courts.ca.gov/documents/pos030.pdf) (<http://www.courts.ca.gov/documents/pos030.pdf>), but do not have your server sign it yet. Make one copy for each other party.

Have the server mail a set of forms (one Case Management Statement and one Proof of Service by Mail) to each other party, or their attorney if they have one. Use normal first class mail, not certified or registered mail.

After mailing, have your server date and sign the Proof of Service by Mail.

For more details on how to fill out the Proof of Service by Mail, see our [Proof of Service by Mail](https://saclaw.org/resource_library/serving-documents-by-mail/) ([https://saclaw.org/resource\\_library/serving-documents-by-mail/](https://saclaw.org/resource_library/serving-documents-by-mail/)) guide.

## 4. Copying and Assembling

Make two copies of each:

- Case Management Statement (CM-110)
- Proof of Service by Mail (POS-030) (signed)

In the Sacramento County Superior Court, because documents are scanned into a computer, any multiple page original documents are left unstapled, while each copy is stapled. In courts that do not electronically scan, all are stapled, and the original is two-hole punched at the top of the page for insertion into a folder.

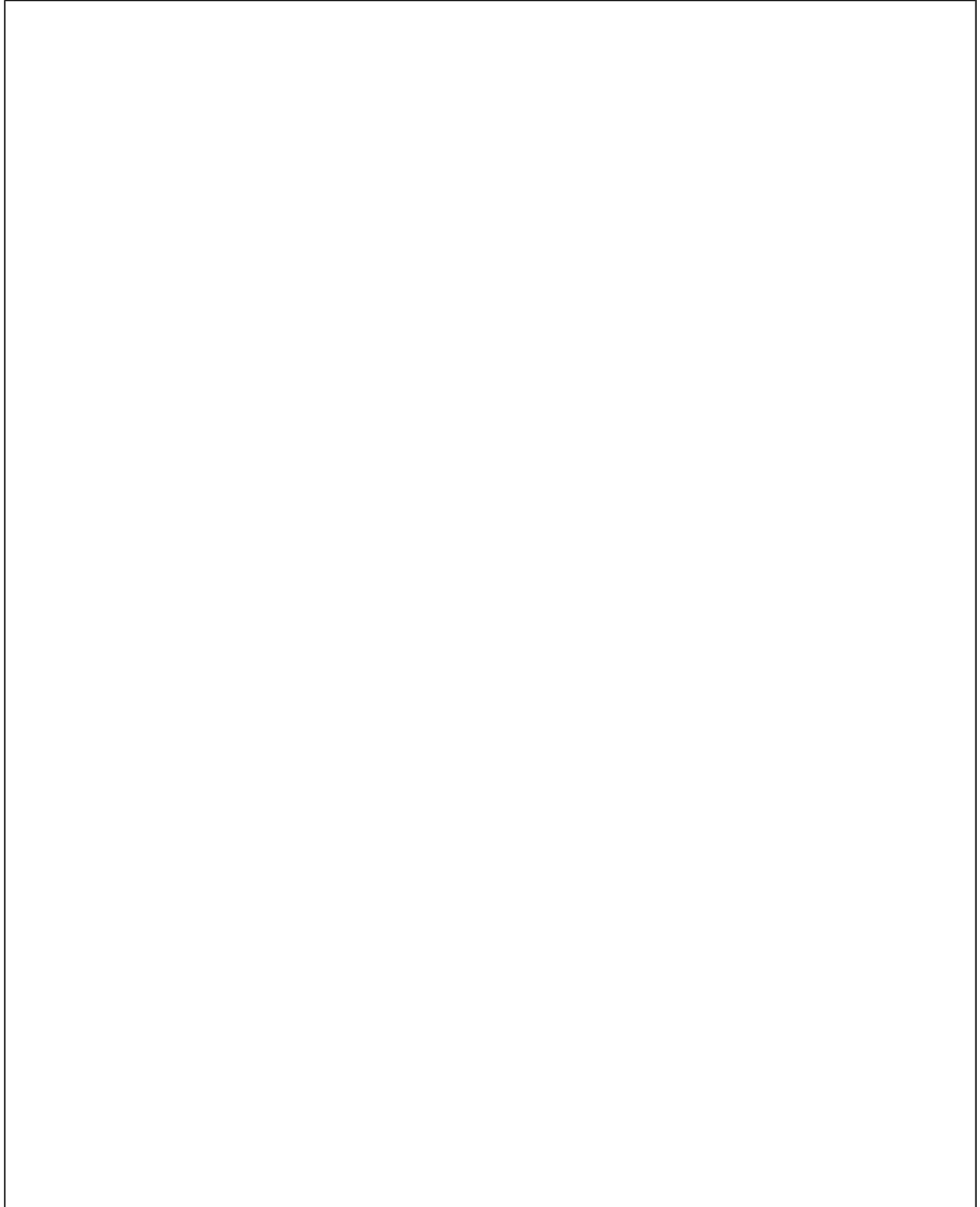
## 5. Filing

In Sacramento, *Case Management Statements* are filed in the drop box in the first floor lobby at the Sacramento Superior Court at 720 Ninth Street. Fill out and attach the [Civil Document Drop-Off Sheet](http://www.saccourt.ca.gov/forms/docs/cv-drop-off-sheet.pdf) (<http://www.saccourt.ca.gov/forms/docs/cv-drop-off-sheet.pdf>), and date stamp the back of the original packet. A supply of *Civil Document Drop-Off Sheets* and a date stamp are located near the drop box. Following the instructions posted at the drop box, place the unstapled original document packet plus two copies of the packet in the drop box.

**If you want a copy back, include a self-addressed stamped envelope.** In Sacramento, you will also be able to download a copy free from the court's case portal. The court will retain the original papers for its file.

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## Samples



**CM-110**

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address):  
PAUL SAMPLE  
2036 DONNER DRIVE  
SACRAMENTO, CA 95826

FOR COURT USE ONLY

TELEPHONE NO.: 916-123-4567 FAX NO. (Optional):  
E-MAIL ADDRESS:

ATTORNEY FOR (Name): IN PRO PER

SUPERIOR COURT OF CALIFORNIA, COUNTY OF SACRAMENTO  
STREET ADDRESS: 720 NINTH STREET  
MAILING ADDRESS: 720 NINTH STREET  
CITY AND ZIP CODE: SACRAMENTO, CA 95814  
BRANCH NAME: CIVIL

PLAINTIFF/PETITIONER: PAUL SAMPLE  
DEFENDANT/RESPONDENT: PETER PERPETRATOR

**CASE MANAGEMENT STATEMENT**

(Check one): ☒ **UNLIMITED CASE** (Amount demanded exceeds \$25,000) ☐ **LIMITED CASE** (Amount demanded is \$25,000 or less)

CASE NUMBER: 34-2021-00123456

A CASE MANAGEMENT CONFERENCE is scheduled as follows:  
Date: 8/31/2021 Time: 8:30 AM Dept.: 35 Div.:  
Address of court (if different from the address above):

☐ Notice of Intent to Appear by Telephone, by (name):

**INSTRUCTIONS: All applicable boxes must be checked, and the specified information must be provided.**

1. **Party or parties (answer one):**  
a. ☐ This statement is submitted by party (name): PAUL SAMPLE  
b. ☐ This statement is submitted jointly by parties (names):

2. **Complaint and cross-complaint (to be answered by plaintiffs and cross-complainants only)**  
a. The complaint was filed on (date): 1/20/2021  
b. ☐ The cross-complaint, if any, was filed on (date):

3. **Service (to be answered by plaintiffs and cross-complainants only)**  
a. ☐ All parties named in the complaint and cross-complaint have been served, have appeared, or have been dismissed.  
b. ☒ The following parties named in the complaint or cross-complaint  
(1) ☐ have not been served (specify names and explain why not):  
(2) ☐ have been served but have not appeared and have not been dismissed (specify names):  
(3) ☒ have had a default entered against them (specify names):  
PETER PERPETRATOR  
c. ☐ The following additional parties may be added (specify names, nature of involvement in case, and date by which they may be served):

4. **Description of case**  
a. Type of case in ☒ complaint ☐ cross-complaint (Describe, including causes of action):  
Subrogation

Form Adopted for Mandatory Use  
Judicial Council of California  
CM-110 (Rev. September 1, 2021)

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www.court.ca.gov

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Case Management Statement (CM-110) (page 1)

The plaintiff's and the defendant's names as they appear on the complaint

Case Number

PLAINTIFF/PETITIONER: PAUL SAMPLE  
DEFENDANT/RESPONDENT: PETER PERPETRATOR

CASE NUMBER:  
34-2021-00123456

CM-110

4. b. Provide a brief statement of the case, including any damages. (If personal injury damages are sought, specify the injury and damages claimed, including medical expenses to date (indicate source and amount), estimated future medical expenses, lost earnings to date, and estimated future lost earnings. If equitable relief is sought, describe the nature of the relief.)

Plaintiff's vehicle was parked in front of his residence when the defendant's vehicle struck it. Defendant was under-insured and has failed and continues to fail to pay for the repairs to plaintiff's vehicle.

Give a brief description of dispute.

☐ (If more space is needed, check this box and attach a page designated as Attachment 4b.)

5. **Jury or nonjury trial**

The party or parties request: ☐ a jury trial ☒ a nonjury trial. (If more than one party, provide the name of each party requesting a jury trial):

6. **Trial date**

a. ☐ The trial has been set for (date):

b. ☒ No trial date has been set. This case will be ready for trial within 12 months of the date of the filing of the complaint. (If not, explain):

c. Dates on which parties or attorneys will not be available for trial (specify dates and explain reasons for unavailability):

7. **Estimated length of trial**

The party or parties estimate that the trial will take (check one):

a. ☒ days (specify number): 1-2

b. ☐ hours (short causes) (specify):

Mark the appropriate boxes in questions 5-10 and provide specifics in space provided.

8. **Trial representation (to be answered for each party)**

The party or parties will be represented at trial ☒ by the attorney or party listed in the caption ☐ by the following:

a. Attorney:

b. Firm:

c. Address:

d. Telephone number:

f. Fax number:

e. E-mail address:

g. Party represented:

☐ Additional representation is described in Attachment 8.

9. **Preference**

☐ This case is entitled to preference (specify code section):

10. **Alternative dispute resolution (ADR)**

a. **ADR information package.** Please note that different ADR processes are available in different courts and communities; read the ADR information package provided by the court under rule 3.221 of the California Rules of Court for information about the processes available through the court and community programs in this case.

(1) For parties represented by counsel: Counsel ☐ has ☐ has not provided the ADR information package identified in rule 3.221 to the client and reviewed ADR options with the client.

(2) For self-represented parties: Party ☐ has ☐ has not reviewed the ADR information package identified in rule 3.221.

b. **Referral to judicial arbitration or civil action mediation (if available).**

(1) ☐ This matter is subject to mandatory judicial arbitration under Code of Civil Procedure section 1141.11 or to civil action mediation under Code of Civil Procedure section 1775.3 because the amount in controversy does not exceed the statutory limit.

(2) ☐ Plaintiff elects to refer this case to judicial arbitration and agrees to limit recovery to the amount specified in Code of Civil Procedure section 1141.11.

(3) ☐ This case is exempt from judicial arbitration under rule 3.811 of the California Rules of Court or from civil action mediation under Code of Civil Procedure section 1775 et seq. (specify exemption):

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Case Management Statement (CM-110) (page 2)

The plaintiff's and the defendant's name as they appear on the complaint

Case Number

PLAINTIFF/PETITIONER: PAUL SAMPLE  
DEFENDANT/RESPONDENT: PETER PERPETRATOR

CASE NUMBER  
34-2021-00123456

CM-110

10. c. Indicate the ADR process or processes that the party or parties are willing to participate in, have agreed to participate in, or have already participated in (check all that apply and provide the specified information)

Mark the appropriate boxes in 10c.

Complete both columns if applicable.  
See page 2 of this guide for  
information on answering this  
question.

	The party or parties completing this form <b>are willing</b> to participate in the following ADR processes (check all that apply):	If the party or parties completing this form have already participated in or have already completed the process, indicate the status of the process (stipulation):
(1) Mediation	<input type="checkbox"/>	<input type="checkbox"/> Mediation session not yet scheduled <input type="checkbox"/> Mediation session scheduled for (date): <input type="checkbox"/> Agreed to complete mediation by (date): <input type="checkbox"/> Mediation completed on (date):
(2) Settlement conference	<input type="checkbox"/>	<input type="checkbox"/> Settlement conference not yet scheduled <input type="checkbox"/> Settlement conference scheduled for (date): <input type="checkbox"/> Agreed to complete settlement conference by (date): <input type="checkbox"/> Settlement conference completed on (date):
(3) Neutral evaluation	<input type="checkbox"/>	<input type="checkbox"/> Neutral evaluation not yet scheduled <input type="checkbox"/> Neutral evaluation scheduled for (date): <input type="checkbox"/> Agreed to complete neutral evaluation by (date): <input type="checkbox"/> Neutral evaluation completed on (date):
(4) Nonbinding judicial arbitration	<input type="checkbox"/>	<input type="checkbox"/> Judicial arbitration not yet scheduled <input type="checkbox"/> Judicial arbitration scheduled for (date): <input type="checkbox"/> Agreed to complete judicial arbitration by (date): <input type="checkbox"/> Judicial arbitration completed on (date):
(5) Binding private arbitration	<input type="checkbox"/>	<input type="checkbox"/> Private arbitration not yet scheduled <input type="checkbox"/> Private arbitration scheduled for (date): <input type="checkbox"/> Agreed to complete private arbitration by (date): <input type="checkbox"/> Private arbitration completed on (date):
(6) Other (specify):	<input type="checkbox"/>	<input type="checkbox"/> ADR session not yet scheduled <input type="checkbox"/> ADR session scheduled for (date): <input type="checkbox"/> Agreed to complete ADR session by (date): <input type="checkbox"/> ADR completed on (date):

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Case Management Statement (CM-110) (page 3)

The plaintiff's and the defendant's name as they appear on the complaint

Case Number

CM-110

PLAINTIFF/PETITIONER: PAUL SAMPLE DEFENDANT/RESPONDENT: PETER PERPETRATOR	CASE NUMBER: 34-2021-00123456
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**11. Insurance**

a. ☐ Insurance carrier, if any, for party filing this statement (name):

b. Reservation of rights: ☐ Yes ☐ No

c. ☐ Coverage issues will significantly affect resolution of this case (explain):

**12. Jurisdiction**

Indicate any matters that may affect the court's jurisdiction or processing of this case and describe the status.

☐ Bankruptcy ☐ Other (specify):

Status:

**13. Related cases, consolidation, and coordination**

a. ☐ There are companion, underlying, or related cases.

(1) Name of case:

(2) Name of court:

(3) Case number:

(4) Status:

☐ Additional cases are described in Attachment 13a.

b. ☐ A motion to ☐ consolidate ☐ coordinate will be filed by (name party):

**14. Bifurcation**

☐ The party or parties intend to file a motion for an order bifurcating, severing, or coordinating the following issues or causes of action (specify moving party, type of motion, and reasons):

**15. Other motions**

☐ The party or parties expect to file the following motions before trial (specify moving party, type of motion, and issues):

**16. Discovery**

a. ☐ The party or parties have completed all discovery.

b. ☒ The following discovery will be completed by the date specified (describe all anticipated discovery):

Party	Description	Date
Plaintiff	Form Interrogatories	09/15/2021

If you are still in the process of sending out/answering discovery requests insert responding party, type of discovery, and estimated date of completion. If you are finished with discovery, mark the appropriate box.

c. ☐ The following discovery issues, including issues regarding the discovery of electronically stored information, are anticipated (specify):

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**CASE MANAGEMENT STATEMENT**

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Case Management Statement (CM-110) (page 4)



<b>The plaintiff's and the defendant's name as they appear on the complaint</b>		<b>Case Number</b>
PLAINTIFF/PETITIONER: PAUL SAMPLE DEFENDANT/RESPONDENT: PETER PERPETRATOR	CASE NUMBER: 34-2021-00123456	

**17. Economic litigation**

a. ☒ This is a limited civil case (i.e., the amount demanded is \$25,000 or less) and the economic litigation procedures in Code of Civil Procedure sections 90-98 will apply to this case.

b. ☐ This is a limited civil case and a motion to withdraw the case from the economic litigation procedures or for additional discovery will be filed (if checked, explain specifically why economic litigation procedures relating to discovery or trial should not apply to this case):

Mark the appropriate box. If you mark 17b, explain why in the space provided.

**18. Other issues**

☒ The party or parties request that the following additional matters be considered or determined at the case management conference (specify):

Plaintiff is in the process of preparing paperwork to receive a default judgment by court as defendant has not answered the complaint to date.

Describe any other issues you want the court to consider at the Case Management Conference.

**19. Meet and confer**

a. ☐ The party or parties have met and conferred with all parties on all subjects required by rule 3.724 of the California Rules of Court (if not, explain):

Check if you have met with the other party. If not, explain why.

b. ☐ After meeting and conferring as required by rule 3.724 of the California Rules of Court, the parties agree on the following (specify):

List the issues the parties agreed upon when they met and conferred.

**20. Total number of pages attached (if any):** \_\_\_\_\_

I am completely familiar with this case and will be fully prepared to discuss the status of discovery and alternative dispute resolution, as well as other issues raised by this statement, and will possess the authority to enter into stipulations on these issues at the time of the case management conference, including the written authority of the party where required.

Date: 8/9/2021

PAUL SAMPLE <small>(TYPE OR PRINT NAME)</small>	 <small>(SIGNATURE OF PARTY OR ATTORNEY)</small>
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Date, type or print your name, and Sign on the lines provided.

Additional signatures are attached.

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Case Management Statement (CM-110) (page 5)