

# Case Intake & Conflict Information

Provide administrative and relationship information before sending detailed submissions. Submission does not establish case acceptance, appoint a neutral, or create an agreement to mediate or arbitrate.

## 1. Matter and process

Matter title / existing firm case number

Administering legal entity / registered business name and address (case administration completes)

Requested process: mediation, contractual arbitration, neutral evaluation, or other

Private matter or court program / court, case number, order date, and deadlines

Existing ADR clause, submission agreement, court order, or referral; identify attachments

## 2. Requesting party

Requesting party / authorized contact and role

Email, telephone, and postal address

Attorney / firm / contact information, or indicate self represented

### 3. Parties and interests

Identify every party and the legal names of relevant entities. Include former names, parent and subsidiary entities, insurers, beneficial owners, material financial interests, and other persons whose connection to the matter may require conflict review. Use additional clearly labeled schedules where necessary.

Parties, affiliates, insurers, and persons with a material financial interest

Attorneys, law firms, and representatives for each party

Known material witnesses, experts, and relevant prior neutrals

### 4. Administrative overview

Brief nonconfidential description of the dispute and relief requested

Approximate amount / nonmonetary relief / specialized case category

Consumer, employment, public entity, statutory, or other special considerations

Requested neutral / selection procedure / prior relationships to disclose

Preferred dates, location or remote format, accessibility, language, and interpreter needs

Pending hearings, limitation concerns, protective orders, or urgent procedural deadlines

## 5. Submission and confirmation

Do not include confidential mediation statements or unnecessary personal information in this intake form. Administrative information is not automatically protected by mediation confidentiality merely because it is sent to an ADR provider. A case coordinator will confirm the appropriate channel for submissions after conflict review and case acceptance.

A request does not toll a limitation period, stay litigation, satisfy a court order, or constitute service of an arbitration demand. Parties remain responsible for required court filings, service, and preservation of their rights. Consumer, employment, and court program matters require review of the specific administrative and legal requirements before acceptance.

Attachments supplied and additional schedules

Submitted by / capacity / date

Please notify case administration promptly if any party, counsel, witness, insurer, or relevant relationship changes.

## Authorities and scope

Judicial Council Arbitrator Ethics Standard 9

California Rule of Court 3.851

California Code of Civil Procedure § 1281.9