

Preliminary Conference & Scheduling Order

For an accepted contractual arbitration. The authorized arbitrator completes or approves this order after the parties have had an opportunity to address the governing procedures.

1. Conference and authority

Matter / case number / arbitrator

Conference date / format / appearances and representatives

Governing agreement / adopted rules edition / applicable law / unresolved scope questions

Disclosure status / supplemental information / disqualification issues / next action

2. Claims and early procedures

Claims, counterclaims, defenses, and issues submitted for determination

Pleading and response dates / amendment procedures

Motion procedure / response dates / any prerequisites or permission required

3. Discovery and evidence

Applicable discovery rights and authorized plan, including CCP § 1283.05 where applicable

Production, deposition permission, expert discovery, and dispute resolution dates

Witness and expert exchange / exhibit lists / evidentiary objections

Protective order / privilege procedure / handling of protected materials

4. Hearing and participation

Hearing dates / location or remote platform / estimated duration / notice requirements

Party attendance / accessibility / language or interpreter arrangements

Court reporter or other lawful record / responsibility for arrangements and costs

Prehearing submissions / opening and closing briefs / service dates

5. Record, award, and fees

Expected record closing procedure / authorized supplemental submissions

Award format / authorized scope / lawful deadline / service method

Completed fee agreement / deposit dates / mandatory protections / invoice arrangements

6. Communications and changes

All substantive submissions to the arbitrator must be sent to all parties or their representatives unless expressly permitted by applicable law and ethics standards. Administrative contacts must not provide a substantive advantage. This order does not curtail a statutory right, enlarge arbitral jurisdiction, or convert arbitration material into confidential mediation material.

Procedure for extensions, objections, modification, and future conferences

Reserved issues / additional terms / attached schedules

Arbitrator / signature / date of order

Service method / date / recipients

Authorities and scope

California Code of Civil Procedure § 1282.2

California Code of Civil Procedure § 1283.05

Judicial Council Arbitrator Ethics Standard 14

California Code of Civil Procedure § 1282.5

Judicial Council Arbitrator Ethics Standard 13