

CASE AND COSTS MANAGEMENT CONFERENCE CH 3  
(Amended February 2017)

IN THE HIGH COURT OF JUSTICE

Claim No:

CHANCERY DIVISION

Master [name]

[day, month, year]

BETWEEN:

ABCDEFGH

Claimant

-and-

HIJKLMNO

Defendant

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ORDER

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UPON reading the directions questionnaires bundle

**IT IS ORDERED THAT:**

**Allocation**

**(a) Allocation to Multi-Track**

1. This Claim is allocated to the multi-track.

*And*

**(b) Allocation to Management Track**

2. This claim is allocated to the following management track:
  - (i) Case management by Master and trial by Judge
  - (ii) Case management and trial by Judge (full docketing)
  - (iii) Case management and trial by Master
  - (iv) Case Management by Judge and Master and trial by Judge.

**Case and Costs Management Conference**

3. There be a Case and Costs Management Conference before the Master in Hearing Room...First Floor, The Rolls Building, 7 Rolls Building, Fetter Lane, London EC4A 1NL  
on (date) at am/pm of [1½ hours] duration.  
*[Master's clerk to fix appointment. Note: please allow [½ hr] pre-reading]*
4. If the parties jointly consider after discussion between them that the claim can be conducted justly and at proportionate cost without a Costs Management Order

being made, one party shall notify the Court of this not later than 14 days after service of this Order on them. Upon receiving the notification, if the Court is so satisfied, it will direct that costs management shall not apply to the claim; and paragraphs 5 and 6 of this Order will not apply. Such direction will be formally recorded in the Directions Order made at the Case Management Conference.

5. The parties shall consider the costs budgets and shall notify each other which phases in the other party's budget are agreed and which are not agreed. Where there is disagreement, brief reasons and alternative figures must be provided.
6. The Claimant's solicitors shall by no later than 7 days before the hearing lodge:
  - (i) confirmation that all phases in the budgets are agreed; or
  - (ii) a one page summary in tabular format setting out the figures for the phases in the budgets with an indication of which are agreed and which are not agreed; and
  - (iii) a summary of the reasons for disagreement and the alternative figures.
7. If the parties are proposing that an order for standard disclosure should be made, they shall comply with PD 31B paragraphs 8 and 9 and, if it is considered appropriate, exchange Electronic Documents Questionnaires.
8. The legal representatives attending the CCMC must be in a position to:
  - (i) identify the witnesses who are likely to be called to give evidence;
  - (ii) justify the trial time estimate.
  - (iii) where the value of the claim is not apparent from the claim form or particulars of claim, provide their best estimate of the value of the claim and/or the value of the relief claimed.
9. A hearing bundle must be lodged by 2pm no later than two days before the hearing.
15. This order shall be served by the claimant on the defendant.

**Service of the order**

The court has provided a sealed copy of this order to the serving party:  
[claimant's solicitors]