

Case No:

Target hearing date:

AGENDA FOR CASE MANAGEMENT DISCUSSION

Rules 10-13, 17 and 28
Employment Tribunals Rules of Procedure 2004

It will assist the conduct of the Case Management Discussion if each party or representative could complete this agenda, as far as possible and as relevant to the case. Send a completed copy to each other party and to the Tribunal in good time before the Case Management Discussion. An agreed agenda is particularly helpful.

1. Parties

1.1	Are the names of the parties correct?	
1.2	Should any person be joined as a respondent or party?	
1.3	Should any respondent be dismissed from the proceedings?	
1.4	Is this claim part of a multiple claim?	
1.5	Are there any claims that should be considered together or separately?	

2. The claim and response

2.1	What are the complaints or jurisdictions raised in the claim?	
2.2	Is there any application to amend the claim?	
2.3	Is there any application to amend the response?	
2.4	Is there any request for additional information?	
2.5	Has a statutory questionnaire been served and/or replied to (discrimination cases only)? Is leave to serve a statutory questionnaire sought? Why?	

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3. Remedy

3.1	If successful, what does the claimant seek by way of remedy?	
3.2	What is the value of the claim?	
3.3	Has a schedule of loss been prepared? Date for service?	
3.4	What mitigation of loss has occurred?	

4. The issues

4.1	What are the issues or questions for the Tribunal to decide?	
4.2	Are there any preliminary issues or jurisdictional issues?	
4.3	Are there any issues under the Human Rights Act or EU Law?	
4.4	Should the parties or their representatives prepare a schedule of issues (to be approved by the Tribunal)? Dates?	

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5. Preliminary hearings

5.1	Is a further case management discussion required? What agenda? Time allocation? Dates?	
5.2	Is a pre-hearing review required? What applications or issues? Time allocation? Dates?	
5.3	Is any other type of interim or preliminary hearing required? What applications or issues? Time allocation? Dates?	

6. Documents and expert evidence

6.1	Have lists of documents been exchanged? Date for mutual exchange of lists?	
6.2	Have documents been inspected or copies exchanged? Date for inspection or mutual exchange of copies? <ul style="list-style-type: none">• for a preliminary hearing• for the Hearing	
6.3	Who will be responsible for preparing <ul style="list-style-type: none">• draft index of documents?• the hearing bundles? Date for completion of this task?	
6.4	Is this a case in which medical evidence is required? Dates for <ul style="list-style-type: none">• disclosure of medical records• agreeing any joint expert• agreeing any joint instructions• instructing any joint expert• any medical examination• producing any report• asking questions of any expert• making any concessions	
6.5	Is this a case in which any other expert evidence is required? Relevant dates?	
6.6	Are there any other disclosure requirements?	

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7. Witnesses

7.1	How many witnesses will each party call? Who are those witnesses? What is the relevance of their evidence?	
7.2	Are any witness orders required? Who are those witnesses? What is the relevance of their evidence?	
7.3	Should witness statements be prepared? Should exchange be on the same date? Dates for exchange? <ul style="list-style-type: none">• for a preliminary hearing• for the Hearing	

8. The hearing(s)

8.1	Time estimate for: <ul style="list-style-type: none">• case management discussion• pre-hearing review• other preliminary hearing• Hearing	
8.2	Dates to avoid (with reasons)	
8.3	Hearing dates for: <ul style="list-style-type: none">• case management discussion• pre-hearing review• other preliminary hearing• Hearing	
8.4	Is there an application for a private hearing (rule 16)? Why?	
8.5	Is there an application for a hearing (or part of one) via electronic communications (rule 15)? Why?	
8.6	Is a restricting reporting order (rule 50) or register deletion order (rule 49) required? Why?	

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9. Other preparation

9.1	Should there be admissions? Dates?	
9.2	Should there be agreed facts? Dates?	
9.3	Should there be a chronology? Dates?	
9.4	Should there be any other agreed document to aid the Tribunal? What? Dates?	
9.5	Should there be written submissions or skeleton arguments? Dates?	
9.6	Is reading time for the Tribunal required? Why?	
9.7	Does a party require further guidance on any matter of preparation?	
9.8	Are any reasonable adjustments required?	

10. Judicial mediation

10.1	Is this a case that might be suitable for judicial mediation?	
10.2	Are the parties interested in the possibility of judicial mediation?	
10.3	JUDICIAL USE ONLY	If relevant, Judge to consider whether criteria for judicial mediation apply and then raise with the parties and record response. If necessary, give a direction for a response. Refer to REJ, if appropriate

11. Any other matters

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