

<p style="text-align: center;"><b>Instructions for Initial Case Management Conference Data Sheet</b></p>
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**Purpose of the Initial Case Management Conference Data Sheet**

This form will provide information to the Court to use at the Initial Case Management Conference. The information will help identify programs that may be available to you to help resolve your case.

**Submitting the Initial Case Management Conference Data Sheet**

This form must be provided to the other party and submitted to the Court three (3) business days prior to the Initial Case Management Conference. The form and the proof of service on the other party should be mailed or delivered to:

Family Division  
Sherburne County Courthouse  
13880 Business Center Drive NW  
Elk River, MN 55330

**Completing the Initial Case Management Conference Data Sheet**

This form must be completed with the best information available at the time of completion.

**Caption:**

First, designate which party is completing the form. In the upper right hand corner of page one (1), check the box to indicate whether you are the Petitioner or Respondent in this action.

**Section # 1:**

- (1) Check the box indicating whether you are the Petitioner or Respondent in this action
- (2) Indicate whether an interpreter is needed for the ICMC hearing. If “yes”, indicate which language is requested.
- (3) Indicate whether there is a current court order that prohibits contact between you and the other party. For example, a Harassment Restraining Order (HRO), Domestic Abuse Order for Protection (OFP), No Contact Order, or other court order. If there is an existing court order prohibiting contact with the other party, you must attach a copy of the order(s).

Additionally, please indicate whether you have ever been or are now afraid of the other party in the case.

**Background Information:**

- (1-5) List your name, address, phone number, e-mail address and indicate how many other adults live with you
- (6) Please list any physical or mental health issues that may affect this proceeding along with any chemical dependencies or criminal issues.
- (7) Indicate whether you are on public assistance. If “yes”, please check which type of assistance specifically.

**Information Regarding Children:**

- (1) List the joint children of the Petitioner and Respondent in *this* case. A joint child means the dependent child of both parents in the proceeding. (Joint child(ren) does not include the child(ren) of either party's other relationships, such as stepchild(ren) or other relatives living with you). List the name of each child, the child(ren)'s birth date and the child(ren)'s age.
- (2) List any special needs of the joint children, including any physical or mental disabilities that require special care or additional expenses because of the special needs.
- (3) List the *other* child(ren) not of the relationship between Petitioner and Respondent who reside with you by indicating their name, birth date and age.
- (4) List the details of any past or current child protection cases involving the joint children.
- (5) List the details, if applicable, of any child support cases involving the joint children of this case.
- (6) Indicate whether there is an agreement between you and the other parent regarding legal custody of the children. Joint legal custody means that both parents have a say about major decisions in the children's upbringing, such as schooling, religious training, and elective (non-emergency) medical care. Legal custody does not have anything to do with where the children live.
- (7) Indicate whether there is an agreement between you and the other parent regarding physical custody of the children. If a parent has physical custody of the children that means the children live with that parent.
- (8) Indicate whether there is an agreement between you and the other parent regarding the future parenting time (visitation) arrangements and list the details of the agreement.
- (9-11) Indicate whether a *temporary* agreement has been reached between the parties regarding legal custody, physical custody and/or parenting time of the children.
- (12) If there is an agreement of any type for any of the above issues, please give a brief statement as to the terms of that agreement. Attach additional sheets of paper as necessary.

**Information Regarding Alternate Dispute Resolution Options:**

- (1) Indicate which ADR option the parties have agreed to pursue. If "Other", please write in which method has been selected specifically.

**Information Regarding Finances:**

- (1) List the employer name and employer address for you and the other parent, if known.
- (2) List your current gross monthly income and the current gross income of the other parent, if known.

**Only answer Questions #3-#17 if this is a divorce case that has *not* been finalized. If this is a divorce case that *has* been finalized or this is not a divorce case at all, please skip to Question #16.**

- (3) List the date of marriage.
- (4) List the date of separation. If still physically living together, please briefly explain in the margin.
- (5) Please indicate the approximate value, mortgage and the date of purchase of the homestead (if any).

- (6) Please list all applicable bank accounts and balances (checking and savings).
- (7) Indicate if you have any pensions or profit sharing plans by indicating the account name, value and to whom it is owned.
- (8) Please list the make, model, year and approximate mileage of your vehicle(s) (if applicable).
- (9) Please list the make, model, year and approximate mileage of any recreational equipment (boats, RVs, ATV, etc.).
- (10) Indicate whether there are any other miscellaneous assets of value. If so, please designate each with an approximate value.
- (11) Please check if there are any claims that certain property is non-marital property? This would be property acquired by a *before* the marriage.
- (12) Have any *temporary* agreements regarding the division of property or use of the homestead been reached? If “yes”, please give a brief statement as to the terms of that agreement at Question #14. Attach additional sheets of paper as necessary.
- (13) Have any *permanent* agreements regarding the division of property been reached? If “yes”, please give a brief statement as to the terms of that agreement at Question #14. Attach additional sheets of paper as necessary.
- (14) Indicate the terms of any agreements regarding the division of property and/or the use of the homestead. Attach additional sheets of paper as necessary.
- (15) Explain the current agreement, if any, between you and the other parent regarding financial support (including spousal maintenance and child support, etc.). If “yes”, please give a brief statement as to the terms of that agreement at Question #17.
- (16) Explain any *temporary* agreement, if any, between you and the other parent regarding financial support (including spousal maintenance and child support, etc.). If “yes”, please give a brief statement as to the terms of that agreement at Question #17.
- (17) Indicate the terms of any agreements between you and the other parent regarding financial support (including spousal maintenance and child support, etc.). Attach additional sheets of paper as necessary.

**Attaching Documents to the Data Sheet:**

Do not attach original documents. Send only copies. The documents requested will be used to determine the income of both parties if there is an agreement to establish child support.

**Sign and date the form on page five (5). Also print your name, current address and telephone number.**

Petitioner's  Respondent's

\_\_\_\_\_, Petitioner,  
and  
\_\_\_\_\_, Respondent

**Confidential  
Initial Case Management  
Conference Data Sheet**

**THIS FORM MUST BE COMPLETED WITH THE BEST INFORMATION AVAILABLE AT THE TIME OF COMPLETION AND SUBMITTED TO THE COURT, AND PROVIDED TO THE OTHER PARTY, AT LEAST THREE (3) BUSINESS DAYS BEFORE THE INITIAL CASE MANAGEMENT CONFERENCE.**

1. The following information is provided by the  Petitioner  Respondent.
2. Is an interpreter needed for the ICMC?  Yes  No. If yes, language? \_\_\_\_\_.
3.
  - a. Has either party been the subject of a harassment restraining order?  Yes  No.
  - b. Has either party been the subject of a domestic abuse order for protection?  Yes  No.
  - c. Has either party been the subject of a No Contact Order or other court order restricting contact?  Yes  No.
  - d. Is there a criminal no contact order (DANCO)?  Yes  No.

**If you answered "yes" to any of the above questions 3a-d, you must attach a copy of that order.**

- e. Has domestic abuse occurred in this relationship?  Yes  No.
- f. Have you been, or are you now, afraid of your spouse?  Yes  No. If "yes", explain: \_\_\_\_\_

**BACKGROUND INFORMATION:**

1. Your date of birth: \_\_\_\_\_
2. Your current address: \_\_\_\_\_
3. Your current phone number: \_\_\_\_\_
4. Your current e-mail address: \_\_\_\_\_
5. Names of any other adults living with you: \_\_\_\_\_
6. Do you have any physical, mental health, chemical dependency, or criminal issues that may affect this proceeding? If "yes," please describe:

7. Are you currently receiving any form of public assistance?  Yes  No. If yes, check all that apply:
- Cash public assistance (MFIP)       Child Care subsidy       Diversionary Work Program (DWP)
- Food Stamps       General Assistance from State of MN       Medical Assistance
- Minnesota Care       Social Security Benefits (SSI)       TERFA
- Other (explain): \_\_\_\_\_

**INFORMATION REGARDING CHILDREN:**

1. List the names, birthdates and ages of the minor children of this relationship.
  
2. Do any other children of this relationship have special needs?  Yes  No. If "yes", please explain:
  
3. List the names, birthdates and ages of other minor children of the parties.
  
4. Have any of the children been the subject of a child protection case?  Yes  No.  
If yes: when \_\_\_\_\_ where (county)\_\_\_\_\_.
  
5. Is there a separate Child Support case involving the children of this relationship?  Yes  No.  
If yes: when \_\_\_\_\_ where (county)\_\_\_\_\_.
  
6. Is there an agreement regarding legal custody of the children?  Yes  No.
  
7. Is there an agreement regarding physical custody of the children?  Yes  No.
  
8. Is there an agreement regarding parenting time?  Yes  No.
  
9. Is there an agreement regarding *temporary* legal custody of the children?  Yes  No.
  
10. Is there an agreement regarding *temporary* physical custody of the children?  Yes  No.
  
11. Is there an agreement regarding *temporary* parenting time?  Yes  No.
  
12. Give a statement of what the agreement is for each issue for which there is an agreement: (attach additional pages as needed)

**INFORMATION REGARDING ALTERNATE DISPUTE RESOLUTION OPTIONS:** (Check one)

**Mediation**

Parties agree to retain the services of \_\_\_\_\_ and will pay all costs.

**Early Neutral Evaluation**

Parties agree to participate in court annexed ENE program for a set fee.

Parties agree to participate in a private ENE program and pay all costs.

**Other** (please indicate):

**INFORMATION REGARDING FINANCES**

1. Petitioner’s Employer and address: \_\_\_\_\_ Respondent’s Employer and address: \_\_\_\_\_

2. Petitioner’s gross monthly income: \_\_\_\_\_  
Respondent’s gross monthly income: \_\_\_\_\_

**If this is a marital dissolution (divorce case) and dissolution has not already been entered, answer Questions 3 - 17, otherwise, if this is not a dissolution case or dissolution has already been entered, skip Questions 3-15 and answer only Questions 16 and 17:**

3. Date of Marriage: \_\_\_\_\_

4. Date of Separation: \_\_\_\_\_. If still physically living together, please explain:

5. Homestead Address:

- a. Approximate Homestead value: \$
- b. Mortgage on Homestead: \$
- c. Date of purchase:

6. Checking Accounts and Balances:

Bank Name:	Balance:
	Checking Account: \$ Savings Account: \$
	Checking Account: \$ Savings Account: \$
	Checking Account: \$ Savings Account: \$

7. Pensions and Profit Sharing Plans (specify account name, approximate value, how it is owned and by whom):

8. Automobiles (make, model, year, approximate mileage and approximate value):
  
9. Recreational equipment (boats, guns, ATV, motorcycles, etc.) (make, model, year, approximate value):
  
10. Other assets of value (do not include normal household goods and furnishings). List each with an approximate value:
  
11. Are there non-marital claims?  Yes  No. If yes, itemize:
  
12. Is there an agreement regarding the *temporary* division of property or the *temporary* use and occupancy of the marital residence?  Yes  No.
  
13. Is there an agreement regarding the division of property?  Yes  No.
  
14. Give a statement of what the agreement is for each issue for which there is an agreement: (attach additional pages as needed)
  
15. Is there an agreement regarding financial support (spousal maintenance and/or child support)?  
 Yes  No.
  
16. Is there an agreement regarding *temporary* financial support (spousal maintenance and/or child support)?  
 Yes  No.
  
17. Give a statement of what the agreement is for each issue for which there is an agreement: (attach additional pages as needed):

**ATTACH THE FOLLOWING DOCUMENTS TO THIS DATA SHEET:**

1. Pay stubs for the last three months of employment.
2. Please attach your most recent Federal Tax Return with all attachments, including W-2s and 1099's as applicable, for the past two years.
3. Please attach any unemployment compensation statements or worker's compensation statements and all other income received during the last three (3) months, including any public financial assistance in money or in-kind services (grants, heating assistance, medical assistance, etc.)

THIS FORM WAS PREPARED BY:

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

Address/Telephone Number:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_