

**MONTANA FIFTH JUDICIAL DISTRICT
LOCAL COURT RULES**

Rule 1 -- Law and Motion.

1.1 The typical court schedule is:

- (1) Monday: Madison County,
- (2) Tuesday: (criminal) and Thursday (DN): Beaverhead County; and
- (3) Wednesday: Jefferson County.

1.2 A party shall set and confirm hearing dates with the Clerk of Court. In the event a party encounters extreme difficulties with a date ordered by the Court, the party shall consult with the opposing party and then advise the Court by stipulation or a motion stating the efforts to contact the opposing party and the opposing party's position.

1.3 Parties shall confirm the specific time for their hearing by consulting the weekly calendar. Hearings are often initially set with a general start time and assigned a specific time in the weekly schedule.

Rule 2 – Pleadings, Motions, Orders, and Discovery.

2.1 Briefs may not exceed 20 pages without leave of the Court for good cause demonstrated.

2.2 Proper documentation demonstrating service must accompany all documents offered for filing other than a complaint. The Court will not consider any documents requiring a certificate of service that do not have a certificate of service attached. The Clerk of Court shall return documents that are not in compliance with this subsection (2.2) forthwith and without further order.

2.3 A demand for a jury trial must be included in the caption of the complaint or answer.

2.4 All motions, stipulations, etc. must be a separate document from the proposed order.

2.5 All motions shall address stipulation or opposition when applicable. Motions that require opposing party contact and are silent on the matter will be rejected.

2.6 To promote the electronic storage and exchange of documents and reduce redundant scanning of documents produced by the Court, the Clerk of Court may distribute copies of Court orders and minute entries by email rather than by hard copy. A party shall provide the Clerk of Court with the email address(es) to which copies of orders or minute entries are to be mailed.

A party who has filed any document in the Court electronically is deemed to have provided written consent to receive documents electronically. (Rule 5(b)(2)(E), M. R. Civ. P.)

2.7 The following matters are exempt from the scheduling procedure required by Rule 16(b), M. R. Civ. P.:

- (1) youth court cases;
- (2) URESA actions;
- (3) abstracts of judgment and transcripts of judgment;
- (4) adoptions;
- (5) incompetency hearings;
- (6) probate cases;
- (7) small claims appeals;
- (8) administrative appeals;
- (9) name change cases;
- (10) seizures and forfeitures;
- (11) habeas corpus and post-conviction relief;
- (12) criminal cases; and
- (13) other cases for which good cause is shown.

2.8 Pursuant to Rule 26, M. R. Civ. P., the following discovery rules must be followed in every cause not exempted in subsection 2.7, except Domestic Relations Cases and those cases wherein good cause is shown by motion and affidavit:

(1) Except with leave of the Court, a party may not seek discovery from any source before making an appropriate pre-discovery disclosure and may not seek discovery from another party before serving that party with an appropriate disclosure. A party may serve written discovery requests upon a party simultaneously with service of the required disclosure statement upon that party. Each party shall serve an appropriate disclosure not later than 30 days after entry of the case scheduling order. The disclosure must contain the following information:

- (a) the factual basis of each claim or defense advanced by the disclosing party;
- (b) the legal theory upon which each claim or defense is based, including, when necessary for a reasonable understanding of the claim or defense, citations or pertinent legal or case authorities;
- (c) the name and, if known, the address and telephone number of each individual known or believed to have discoverable information about the claims or defenses and a summary of that information;
- (d) a copy of or a description, including the location and custodian, of documents or data compilations and tangible things and relevant documents reasonably likely to bear on the claims or defenses;

(e) a computation of any damages claimed; and

(f) the substance of any insurance agreement that may cover any resulting judgment.

(2) The disclosure obligation is reciprocal and continues throughout the case. A party who has made a pre-discovery disclosure is under a duty to supplement or correct the disclosure within a reasonable time if the party learns that the information disclosed is not complete and correct or is no longer complete and correct.

Rule 3 -- Filings.

3.1 All cases **shall** be filed using e-filing unless specifically exempted by the E-Filing rules found on the Montana Judicial Branch website.

3.2 Documents not filed in accordance with these rules shall be rejected by the Clerk of Court's Office.

3.3 All proposed e-file Orders shall be filed in Word, as a separate document categorized as a Proposed Order in e-file, and shall not have a footer, or signature/date block for the judge.

3.4 All exhibits unable to be e-filed shall be delivered to the Clerk's office and shall be accompanied by a Notice describing the exhibits. The Clerk's office will file the Notice when they are in possession of the exhibits.

3.5 (1) All documents not currently accepted by e-filing may be submitted for filing in person, by email, or facsimile *and must be accompanied by the fee of \$.50/page as required by §25-1-201(1)(r), MCA*. Documents filed by email or facsimile are considered the originals. Mailed original documents are **not required and duplicates may not be filed**.

(2) Documents submitted by email in accordance with 3.5(1) must be emailed to:

Beaverhead County: clerkofcourt.beaverhead@mt.gov

Jefferson County: districtcourt.jefferson@mt.gov

Madison County: clerkofcourt.madison@mt.gov

(3) Documents submitted by facsimile must be faxed to:

Beaverhead County: (406) 683-3728

Jefferson County: (406) 225-4044

Madison County: (406) 843-5207

3.6 When filing documents by email or facsimile, the following guidelines must be followed:

- (1) all documents must be properly signed and dated with the party's copied or electronically generated signature; and
- (2) emailed documents must be in a PDF format and submitted as an attachment to an email.

3.7 For the purposes of this rule, the term "document" means any combination of a motion, brief, affidavit, etc., that is filed in a civil or criminal case.

3.8 Payment or proof of payment is required prior to the Clerk's office accepting/filing any documents.

3.9 A.I. shall be used with caution. Documents created by A.I. which do not meet filing requirements shall be rejected.

Rule 4 -- Jury Instructions.

4.1 The parties **shall** confer with each other before submitting jury instructions. Duplicate instructions **shall not** be submitted.

4.2 Requested instructions must include a cover sheet bearing the case number, caption, title, e.g., "Plaintiff's Requested Instructions," signature, and praecipe.

4.3 Each requested instruction must be identified by party and consecutive number, e.g., "Plaintiff John Smith's Requested Instruction No. 1," "Plaintiff John Smith's Requested Instruction No. 2," and so forth.

4.4 Parties **shall** provide only an electronic copy of instructions in Word format to Diane Kaatz, Judicial Assistant at dkaatz@mt.gov.

4.5 For criminal trials jury instructions are due 7 days before trial unless otherwise noted by the Court. For civil trials jury instructions are due 21 days before trial.

Rule 5 -- Attorneys.

5.1 An attorney seeking to appear *pro hac vice* shall file a motion and proposed order accompanied by a copy of the State Bar of Montana *Pro Hac Vice* Application and confirmation correspondence from the Bar Admissions Administrator.

5.2 After the final disposition of a case and after the time for appeal has expired, an attorney is relieved of the attorney's duties as counsel of record, provided the attorney first files a notice of termination with the Clerk of Court and serves the notice on their client and the opposing party. Thereafter, notice must be served on the opposing party as provided in Rule 4(D), M. R. Civ. P.

5.3 If no action occurs within 12 months of entry of a final decree or order in a Domestic Relations or Paternity case, an attorney is no longer considered to be counsel of record in the case and the attorney's designation as such must be terminated, unless the attorney provides notice to the Court otherwise.

5.4 When an attorney moves to withdraw from representation of their client they **shall** list their client's full contact information in their proposed Order.

Rule 6 -- No Appearance by Party Required.

A personal appearance by a party may not be required in the following cases and under the circumstances specified:

- (1) quiet title actions when an affidavit of the salient facts has been filed with the Court and the opponents are in default;

- (2) probate of estates when proper documentation has been filed and there is no objection from any interested party; and
- (3) dissolutions when:
 - (a) there is filed a verified petition and uncontroverted affidavit, including proof of service upon the opposing party;
 - (b) both parties are represented by counsel or there is written certification that the opposing party recognizes that counsel is appearing only for one party and consents to proceed without counsel;
 - (c) there are signed written agreements on all issues; and
 - (d) a completed vital statistics form, judgment fee, and proposed order are provided.

Rule 7 -- Default Judgments and Writs of Execution.

7.1 An application for default judgment must show how the total claimed with interest has been calculated, including but not limited to the interest rate (prime rate as of January of that year per fedprimerate.com), per diem, and number of days accrued.

7.2 Writs of execution must include information in accord with the format available from the Clerk of Court or in a substantially similar form.

Rule 8 -- Exhibits.

8.1 The Clerk of Court shall keep a list of all exhibits offered and the ruling of the Court thereon. An exhibit admitted into evidence may not be removed from the custody of the Clerk of Court without the Clerk's prior approval.

8.2 Exhibits must be pre-labeled as follows:

- (1) Plaintiff's/Petitioner's (Exhibit 1, 2, 3, etc.); or
- (2) Defendant's/Respondent's (Exhibit A, B, C, etc.).

8.3 **Four exhibit lists, and four exhibits shall be submitted as follows:**

- (1) Court file/Clerk of Court (original);**
- (2) Judge (copy for his use);**
- (3) moving party; and**
- (4) other party(s).**

Rule 9 -- Probates.

9.1 The Clerk of Court shall send notice to the personal representative of an Estate three months prior to the expiration of the two-year deadline.

9.2 If the Estate has not been closed by the expiration of the two-year deadline and good cause has not been shown why the Estate should remain open, the Court may order the personal representative and attorney to appear and show cause why the estate has not been closed in the time allowed.

Rule 10 -- General Provisions.

10.1 No food or drink is allowed in the courtroom except for water and coffee that are in suitable **covered** containers.

10.2 Cell phones are allowed in the courtroom only when silenced.

Rule 11 -- Security.

A person wishing to enter the courtroom may be required to submit to a search by security personnel.

Rule 12 -- Child Support Guideline Requirements.

Parent financial affidavits and uniform child support guidelines worksheets must be filed with the Court before entry of any child support order.

Rule 13 -- Parenting Plan Guidelines.

Parenting plan guidelines are available from Diane Kaatz at 406-843-4235, 406-683-3745, or dkaatz@mt.gov to assist parents in understanding what the Court generally believes is reasonable, unless special circumstances require a different arrangement. These are to be considered as general guidelines only.

Rule 14 -- Telephonic or Video Testimony and Appearances.

14.1 Telephonic testimony by witnesses, parties, or attorneys should be the exception and not the rule.

14.2 Attorneys, parties, and witnesses may appear via **Zoom with prior notification to the opposing party and Clerk of Court**. Any objections to Zoom appearance must be addressed prior to the hearing. Zoom information for each courthouse can be found on the Clerk of Court's website and weekly schedule.

14.3 A party appearing by electronic appearance must be aware of potential limitations in court reporting. A party accepts any issues that may arise by this form of appearance. A party not in agreement **shall** appear in person.

14.4 A party appearing via Zoom **shall** be responsible for ensuring their technology is working appropriately and has adequate knowledge on the use of Zoom. Any person appearing via Zoom shall be in a stationary position in an environment appropriate for a court appearance and dressed appropriately.

14.5 **Attorneys and parties in contested hearings shall appear in person absent prior permission by the Court to appear remotely. A failure to appear in person could result in the matter being continued at the Court's discretion.**

14.6 Defendants receiving an agreed upon or potential custodial sentence **may not** appear remotely unless they appear from a detention center or secure DOC placement.

Rule 15 – Out of District Judges.

15.1 These are the local rules for the 5th Judicial District Court under Judge Luke Berger. Any rule, preference, procedure, etc. instituted by a visiting Judge supersedes these rules and the sitting Judge's requirements shall control.

Effective October 14, 2025