**JOINT INITIAL STATUS REPORT UNDER RULE 26(f)**

This case has been assigned to the calendar of Judge Sunil R. Harjani. The parties are directed to meet pursuant to Federal Rule of Civil Procedure 26(f) and conduct a planning conference. At least **seven days** prior to the initial status hearing in this case, please file a **Joint** Initial Status Report Under Rule 26(f), **not to exceed five pages**, containing the following information:

**I. The Nature of the Case:**

A. Identify (names and contact information) for all attorneys of record for each party, including the lead trial attorney.

B. Briefly describe the nature of the claims asserted in the complaint and any counterclaims and/or third-party claims.

C. Briefly identify the major legal and factual issues in the case.

D. State the relief sought by any of the parties.

**II. Jurisdiction:** Explain why the Court has subject matter jurisdiction over the plaintiff(s)’ claim(s).

A. Identify all federal statutes on which federal question jurisdiction is based.

B. If jurisdiction over any claims is based on diversity or supplemental jurisdiction:

1. State whether/why the amount in controversy exceeds the jurisdictional threshold or whether there is a dispute regarding the amount in controversy (and, if so, the basis of that dispute).

2. Identify the state of citizenship of each named party.

**NOTE 1**: Individuals are citizens of the state where they are domiciled; that may or may not be the state where they currently reside. *See* *Heinen v. Northrop Grumman Corp.*, 671 F.3d 669, 670 (7th Cir. 2012).

**NOTE 2**: The citizenship of a corporation is its state of incorporation and its principal place of business, not its headquarters. *Dalton v. Teva North America*, 891 F.3d 687, 690 (7th Cir. 2018).

**NOTE 3**: For unincorporated associations, LLCs, partnerships, underwriting syndicates, and other business entities that are not corporations, identify the name and domicile(s) of each and every partner/member of each such entity. *See Belleville Catering Co. v. Champaign Market Place LLC*, 350 F.3d 691 (7th Cir. 2003); *Cosgrove v. Bartolotta*, 150 F.3d 729 (7th Cir. 1998); *Indiana Gas Co., Inc. v. Home Ins. Co.*, 141 F.3d 314, 316 (7th Cir. 1998); *Carden v. Arkoma Assoc.*, 494 U.S. 185 (7th Cir. 1990). If any partners or members are themselves partnerships or LLCs, the rule also applies to their partners or members.

**III. Status of Service:** Identify any defendants that have not been served.If plaintiff has failed to complete service of process on all defendants, then counsel must describe the efforts to perfect service to date, and provide an estimate for completion of service consistent with Federal Rule of Civil Procedure 4.

**IV. Motions:**

A. Briefly describe any pending motions.

B. State whether the defendant(s) anticipate responding to the complaint by filing an answer or by means of a motion.

**V. Case Plan:**

A. Submit a proposal for a discovery plan, including the following information[[1]](#footnote-1):

1. The general type of discovery needed;

2. A date for Rule 26(a)(1) disclosures;

3. Deadline to amend pleadings and join parties;

4. A date to issue first-set of written discovery requests;

5. A date to issue notices of depositions with agreed upon dates and Rule 45 subpoenas;

6. A fact discovery completion date. For claims involving medical conditions, fact discovery ordinarily includes treating physician depositions; and

7. Whether the parties anticipate expert discovery. If there will be expert discovery, an expert discovery schedule will be set at a later time.

B. If the parties require a protective order entered by the court during discovery, they shall follow the assigned magistrate judge’s procedures. See also the [Model Confidentiality Order](https://www.ilnd.uscourts.gov/_assets/_news/General%20Order%2012-0018%20-%20Form%20LR26.2%20Model%20Confidentiality%20Order.pdf) developed by the Northern District of Illinois.

C. State whether the parties anticipate discovery of ESI in this case. The parties should consult the Court’s [sample ESI order](Standard%20Litigation%20Proposed%20ESI%20Order%20-%20DJ.docx) that can govern non-complex ESI discovery. For complex ESI discovery, including discovery that uses technology assisted review (TAR), the parties should consider submitting a more detailed proposed order to the assigned magistrate judge, with an accompanying motion. In a patent case, the parties should be familiar with the [Local Patent Rules for Electronically Stored Information](https://www.ilnd.uscourts.gov/_assets/_documents/_rules/FINAL%20CLEAN%20Approved%20e%20discovery%20rules.pdf).

D. With respect to trial, indicate the following:

1. Whether a jury trial is requested; and

2. The probable length of trial.

**VI. Consent and Settlement Discussions:**

A.The court strongly encourages the parties to consider consenting to the jurisdiction of the assigned Magistrate Judge. Confirm that counsel have advised the parties that they may proceed before a Magistrate Judge and state whether all parties unanimously consent to do so.

B. Describe the status of any settlement discussions conducted to date (without including the particulars of any demands or offers that have been made) and advise whether the parties mutually request a settlement conference at this time.

**VII. Other Matters:** State any other matters that should be brought to the Court’s attention for scheduling purposes.

1. For patent cases, the proposed schedule should follow the schedule set forth in the Local Patent Rules. [↑](#footnote-ref-1)