

Joint Initial Status Report

In cases where the court requires a joint initial status report, counsel should work cooperatively to prepare a report that includes the information below. Note that the initial status report is not an advocacy document. The parties can take comfort that the description of the dispute will not be used to evaluate the merits of any party's claim or defense; this information is required only to provide the court with an overview of the dispute. Accordingly, there is no need for the parties to include statements about what rights they are reserving. This document will not be read to constitute a waiver or forfeiture of any claims or defense in the dispute.

If the parties cannot agree on any component of the report, counsel for the parties shall meet and meaningfully confer in good faith by phone, video, or in person. If areas of disagreement persist after that conference, the parties may set forth each party's position separately and succinctly without argument, along with a joint certification that summarizes the dates, times, and duration(s) of the good faith conference(s). The joint initial status report shall contain:

- 1) The nature and timing of any pending or anticipated motions
- 2) Proposal for addressing confidentiality concerns, if applicable
- 3) Proposed discovery plan, including:
 - a) Any existing discovery cut-off dates
 - b) The type/extent of discovery needed to engage in meaningful settlement negotiations, either now or at a later point
 - c) Deadline for service of Rule 26(a)(1) disclosures
 - d) Deadline for issuance of initial written discovery requests
 - e) Deadline for completion of fact discovery (including treating physician discovery, if applicable)
 - f) Party agreements, if any, regarding the scope of discovery, such as date restrictions or obligations relating to privilege logs
 - g) Comprehensive expert discovery schedule, including interim dates for serving expert reports and rebuttal reports and a final date for completion of all expert discovery. If the parties agree on staggered expert discovery, the proposed schedule should set out those staggered dates.
 - h) Description of the anticipated scope of discovery involving electronically stored information (ESI) and the potential methodologies for identifying ESI for production.
 - i) Please note the Court has adopted the Principles of the Seventh Circuit Electronic Discovery Pilot Program, and the parties should be familiar with them.
 - ii) In patent cases, the court will apply the Local Patent Rules for Electronically Stored Information.
 - iii) To assist counsel in discovery, the Court has prepared a [sample ESI order](#) that can govern non-complex ESI discovery. For complex ESI discovery, including discovery that uses technology assisted review

(TAR), the Court will consider entering a more detailed proposed order submitted by the parties, with an accompanying motion.

- 4) Any other topic the parties wish to bring to the Court's attention.