

JOINT INITIAL STATUS REPORT

1. Nature of the Case

- A. Identify the attorneys of record for each party, including the lead trial attorney.
- B. Identify any parties that have not yet been served.
- C. State the basis for federal jurisdiction. If jurisdiction over any claims is based on diversity or supplemental jurisdiction:
 - i. state whether and, if so, why the amount in controversy exceeds the jurisdictional threshold; and
 - ii. identify the state of citizenship of each named party.

NOTE: The report must address whether there is diversity of citizenship in any case in which supplemental jurisdiction over state law claims is asserted, so that the Court may exercise informed discretion about whether to resolve such claims in the event that the federal question claims are resolved or dismissed.

- D. Describe generally the nature of the claims asserted in the complaint, any counterclaims, and the relief sought.
- E. State the major legal and factual issues in the case.

2. Mandatory Initial Discovery Pilot Project (does not apply to cases exempt from the pilot project)

- A. Confirm that all of the parties have read and discussed the Standing Order Regarding Mandatory Initial Discovery Pilot Project.
- B. State the due dates for each party's mandatory initial discovery response and disclosure of electronically stored information. If a date for a party's disclosure has passed, indicate whether the party complied with the deadline.
- C. Describe the parties' discussions regarding the mandatory initial discovery responses, including:
 - i. any objections invoked or limitations sought by any party in connection with the party's response; and
 - ii. the parties' resolution (or lack thereof) with respect to any such objection or limitation.

3. Case Plan

- A. Identify all pending motions.
- B. State whether any defendant anticipates responding to the complaint by motion and, if so, the basis for the intended motion.
- C. Submit a proposed discovery plan, including the following information:
 - i. the general type of discovery needed;
 - ii. whether discovery will encompass electronically stored information (ESI) and any anticipated issues regarding disclosure or discovery of ESI, including the form or forms in which it should be produced;
 - iii. any issues about claims of privilege or protection as trial-preparation materials, including—if the parties agree on a procedure to assert these claims after production—whether to ask the court to include their agreement in an order;
 - iv. for cases not included in the Mandatory Initial Discovery Pilot Project, the date on which Rule 26(a)(1) disclosures were made or will be made;
 - v. the date by which the parties will complete fact discovery;
 - vi. whether expert discovery is contemplated and, if so, dates by which Rule 26(a)(2) disclosures will be made and expert depositions completed;
 - vii. what changes, if any, should be made in the limitations on discovery imposed under the Federal Rules of Civil Procedure or by the Local Rules, such as changes in the number of depositions or interrogatories permitted;
 - viii. for cases included in the Mandatory Initial Discovery Pilot Project, the final date by which parties may supplement their mandatory initial discovery responses; and
 - ix. the date by which the parties must file any dispositive motions.
- D. State whether there has been a jury demand and the estimated length of the trial.

3. Settlement

- A. State whether any settlement discussions have occurred and describe the status of any such discussions. Do *not* provide the particulars of any settlement demands/offers.

- B. State whether the parties believe that a settlement conference would be productive at this time.

4. Consent to Proceed Before a Magistrate Judge

- A. State whether counsel have informed their respective clients about the possibility of proceeding before the assigned Magistrate Judge for all purposes, including trial and entry of final judgment, and whether the parties unanimously consent to that procedure.