

WORKSHEET FOR REPORT OF PARTIES' PLANNING MEETING

Case Style: _____

Case No. _____ Type of trial requested: _____

Date case filed/removed = **A**: _____ Date 1st defendant appears = **X**: _____

Date of scheduling conference: _____ Date of Joinder and amendments: _____ ?

Last date to serve discovery requests = **Y**: _____ ?

Last date to take a discovery deposition = **Z**: _____ ?

Number of discovery requests and depositions: _____

Rule 26(a)(2) disclosures re experts:

By party bearing burden of proof: _____ ?

By party not bearing burden of proof: _____ ?

Rebuttal expert disclosures: _____ ?

The parties _____ to a magistrate judge conducting all proceedings.

Mediation (select one): _____ ?

Date by which mediation will take place: _____ ?

At least one party believes that mediation is inappropriate in this action.

Dispositive motions - not Rule 12 (select one): _____ ?

Date due: _____ ?

It is unlikely that dispositive motions will be filed in this action.

Date of settlement meeting and Rule 26(a)(3) disclosures: _____ ?

Plaintiff(s) portion of Pretrial Order due to defendant(s): _____ ?

Integrated Pretrial Order due: _____ ?

Pretrial conference requested for: _____ ?

Proposed charge to the jury due: _____ ?

-OR-

Proposed findings of fact/conclusions of law due: _____ ?

Final settlement conference date requested: _____ ?

Trial date requested: _____ ?