

UNITED STATES DISTRICT COURT
SOUTHERN DISTRICT OF WEST VIRGINIA
AT

V. **REPORT OF PARTIES' PLANNING MEETING**
CASE NUMBER

Guideline for parties and attorneys:
The parties are advised to use the *Worksheet for Report of Parties Planning Meeting* (Form USDC/ATTY-004 located on the Court's website at www.wvsd.uscourts.gov) and the suggested guidelines contained in the form's comments.

1. Pursuant to Fed.R.Civ.P. 26(f), a meeting was held on _____. Those participating were:

_____ for plaintiff(s)
_____ for defendant(s) _____
_____ for defendant(s) _____
_____ for defendant(s) _____

2. Pre-Discovery Disclosures. The parties will exchange by _____
the information required by Fed.R.Civ.P. 26(a)(1).

3. Plaintiff(s) should be allowed until _____ to join additional parties and until _____ to amend the pleadings. Defendant(s) should be allowed until _____ to join additional parties and until _____ to amend the pleadings.

4. Discovery Plan. The parties jointly propose to the court the following discovery plan:
[Use separate paragraphs or subparagraphs as necessary if parties disagree.]

Discovery will be needed on the following subjects: ?

Disclosure of electronically stored information should be handled as follows: ?

The parties have agreed to an order regarding claims of privilege or of protection as trial-preparation material asserted after production, as follows: ?

This action _____ suitable for designation as a complex case requiring special case management procedures and additional pretrial conferences. If the parties and attorneys believe that the case is complex, the basis for that belief is: ?

The last date to serve discovery requests is _____. The last date on which to take a discovery deposition is 45 days after the last date to serve discovery requests. The last date on which to take a discovery ? position is known as the “discovery completion date.” [Discovery on _____ to be completed by _____.] ?

The parties _____ adopt the discovery limits set forth in the Federal Rules of Civil Procedure. If the parties and attorneys believe that more discovery is needed, the basis for that belief is: ?

Reports from retained experts under Rule 26(a)(2) due:

By the party with the burden of proof on an issue: _____; _____;
By the party not bearing the burden of proof on an issue: _____; and
Expert witness disclosures intended solely to contradict or rebut evidence on the same issue
identified by another party: _____.

5. Magistrate judges will resolve discovery disputes. The parties _____ to have a United States magistrate judge conduct any and all further proceedings in the case, including trial, and order the entry of a final judgment.
6. Mediation shall take place on or before _____.
7. Potential dispositive motions shall be filed by _____, with responses and replies filed according to the Local Rules.
8. The parties request a pretrial conference in _____.
The plaintiff(s) shall submit a proposed pretrial order to defendant(s) on or before _____.
The defendant(s) shall compile a proposed integrated pretrial order and _____ mit it to chambers of the presiding judicial officer on or before _____.
9. Where applicable, proposed jury instruction shall be exchanged and transmitted to chambers of the presiding judicial officer in WordPerfect format on or before _____.
10. Where applicable, proposed findings of fact and conclusions of law shall be exchanged and transmitted to chambers of the presiding judicial officer in WordPerfect format on or before _____.
11. A final settlement conference will take place on _____.

12. The case should be ready for trial by _____, and at this time is expected to take approximately _____ days. ?

The parties _____ a conference with the court before entry of the scheduling order.

The form consists of four horizontal lines for text entry. Red arrows point left from the right side of each line. A red arrow points down from the top right to a 'SIGN HERE' button. A blue arrow points down from the top left to a question mark icon, which then points right to the first line. Another blue arrow points down from the bottom left to the second line.