

**IN THE UNITED STATES DISTRICT COURT
FOR THE SOUTHERN DISTRICT OF TEXAS
HOUSTON DIVISION**

	§	
	§	
Plaintiff(s),	§	
	§	
v.	§	CIVIL ACTION NO. 4-CV-_____
	§	
	§	
	§	
Defendant(s).	§	

**JOINT DISCOVERY/CASE MANAGEMENT PLAN
UNDER RULE 26(f)
FEDERAL RULES OF CIVIL PROCEDURE**

(Please restate the instruction before furnishing the information)

1. State where and when the meeting of the parties required by Rule 26(f) was held, and identify the counsel or self-represented litigant who attended for each party. NOTE: the Rule 26(f) meeting must be held in person, by phone, or by video. Email meetings are not permitted.
2. List the cases related to this one that are pending in any state or federal court, with the case number and court, and state how the cases are related.
3. Briefly describe what this case is about.
4. Identify any issues as to service of process, personal jurisdiction, or venue.
5. Federal jurisdiction.
 - a. Specify the allegation of federal jurisdiction.
 - b. Identify the parties, if any, who disagree with the plaintiff's federal jurisdictional allegations, and state their reasons.
 - c. If federal jurisdiction is based on diversity of citizenship and any of the parties is a limited liability entity, please state the citizenship of each of the members of the limited liability entity. When members of a limited liability entity are themselves entities or associations, citizenship must be traced through however many layers of members there are until arriving at the entity that is not a limited liability and identifying its citizenship. *See Acadian Diagnostic Labs., L.L.C. v. Quality Toxicology, L.L.C.*, 965 F.3d 404, 408 fn.1 (5th Cir. 2020).
6. List anticipated additional parties that should be included, and by whom they are wanted.

7. List anticipated interventions.
8. Describe class-action or collective-action issues.
9. State whether each party has made the initial disclosures required by Rule 26(a). If not, describe the arrangements that have been made to complete the disclosures and the dates.
10. If the case includes a claim for attorneys' fees, state whether the parties agree to submit the fees issue to the court for resolution on affidavits or declarations, after the other issues are resolved.
11. Describe the proposed discovery plan, including:
 - A. Responses to the matters raised in Rule 26(f), including any agreements (and disputes) concerning electronic and other discovery.
 - B. Any threshold issues—such as limitations, jurisdiction, or immunity—that should be scheduled for early resolution, what discovery targeted to those issues may need to occur early, and how long this targeted discovery will take.
12. Experts
 - A. Are experts needed on issues other than attorneys' fees?
 - B. If medical experts are needed, identify whether they are only treating physicians or also designated on other issues.
 - C. The date the party with the burden of proof on an issue will be able to designate experts and provide the reports required by Rule 26(a)(2)(B)
 - D. The date the opposing party will be able to designate responsive experts and provide the reports required by Rule 26(a)(2)(B)
13. State the date discovery can reasonably be completed.
14. If the parties are not agreed on a part of the discovery plan, describe the separate views and proposals of each party.
15. Specify the discovery beyond initial disclosures that has been undertaken to date.
16. Describe the possibilities for a prompt settlement or resolution of the case that were discussed in your Rule 26(f) meeting or have emerged since then.
17. From the attorneys' discussion with the clients, state the alternative dispute resolution techniques that are reasonably suitable and when they are likely to be effective in this case.
18. With the consent of all parties, United States Magistrate Judge Andrew Edison may preside and hear jury and non-jury trials. Indicate the parties' joint position on a trial before Judge Edison.
19. State whether a jury demand has been made and if it was made on time.

20. Specify the number of hours it will likely take to present the evidence.
21. List pending motions that may be ruled on at the initial pretrial and scheduling conference.
22. List other pending motions.
23. List issues or matters, including discovery, that should be addressed at the conference.
24. Certify that all parties have filed Disclosure of Interested Parties as directed in the Order for Conference and Disclosure of Interested Parties, listing the date of filing for original and any amendments. **DO NOT STATE THAT THE DISCLOSURE OF INTERESTED PARTIES WILL BE FILED IN THE FUTURE.**

Counsel for Plaintiff(s)

Date

Counsel for Defendant(s)

Date