UNITED STATES DISTRICT COURT

MIDDLE DISTRICT OF FLORIDA

FORT MYERS DIVISION

**[CASE CAPTION]**

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**ERISA CASE MANAGEMENT REPORT**

 The goal of this case management report tailored to ERISA cases involving an administrative record review is to “secure the just, speedy, and inexpensive determination” of the action. *See* Fed. R. Civ. P. 1. Individual judges may have additional case management preferences that can be found under the “Preferences” tab of each judge’s [webpage](https://www.flmd.uscourts.gov/judges/all).

1. **Date and Attendees**

The parties may conduct the planning conference “in person, by telephone, or by comparable means[.]” *See* Local Rule 3.02(a)(1).

The parties conducted the planning conference on enter date. Enter names attended the conference.

1. **Deadlines and Dates**

The parties request these deadlines and dates:

| **DEADLINE** | **DATE** |
| --- | --- |
| **Service of the administrative record and all applicable benefit plan documents including the SPD** | Click or tap to enter a date. |
| **Any motions for leave to conduct discovery, disclose experts, or determine standard of review.** | Click or tap to enter a date. |
| **Completion of mediation** | Click or tap to enter a date. Mediator:  |
| **Filing of the administrative record and all applicable benefit plan documents including the SPD** | Click or tap to enter a date. |
| **Dispositive Motions** | Click or tap to enter a date. |
| **Final Pretrial Meeting** | Click or tap to enter a date. |
| **Motions in Limine** | Click or tap to enter a date. |
| **Joint Final Pretrial Statement, Proposed Jury Instructions and Verdict Form, and Trial Briefs (if applicable)** | Click or tap to enter a date. |
| **Final Pretrial Conference** | Click or tap to enter a date. |
| **Monthly Trial Term** | Click or tap to enter a date. |
| **Estimated Length of Trial** | Choose an item. days |
| **Jury or Non-Jury** | Choose an item. |

1. **Description of the Action**

In a few sentences, describe the nature of the action and its complexity.

1. **Disclosure Statement**

[ ]  The parties have filed their disclosure statement as required by Federal Rule of Civil Procedure 7.1 and Local Rule 3.03.

1. **Related Action**

[ ]  The parties acknowledge their continuing duty under Local Rule 1.07(c) to notify the judge of a related action pending in the Middle District or elsewhere by filing a “Notice of Related Action.”

1. **Consent to a Magistrate Judge**

“A United States magistrate judge in the Middle District can exercise the maximum authority and perform any duty permitted by the Constitution and other laws of the United States.” Local Rule 1.02(a). With the parties’ consent, a district judge can refer any civil matter to a magistrate judge for any or all proceedings, including a non-jury or jury trial. 28 U.S.C. § 636(c).

The Court asks the parties and counsel to consider the benefits to the parties and the Court of consenting to proceed before a magistrate judge. Consent can provide the parties certainty and flexibility in scheduling. Consent is voluntary, and a party for any reason can decide not to consent and continue before the district judge without adverse consequences. *See* Fed. R. Civ. P. 73(b)(2).

[ ]  The parties do consent and file with this case management report a completed Form AO 85 “Notice, Consent, and Reference of a Civil Action to a Magistrate Judge,” which is [available on the Court’s website](https://www.uscourts.gov/sites/default/files/ao085.pdf) under “Forms.”

[ ]  The parties do not consent.

1. **Request for Special Handling**

[ ]  The parties do not request special handling.

[ ]  The parties request special handling. Specifically, describe requested special handling.

[ ]  Enter party’s name unilaterally requests special handling. Specifically, describe requested special handling.

1. **Certification of familiarity with the Local Rules**

[ ] The parties certify that they have read and are familiar with the Court’s Local Rules.

1. **Signatures**

Add name of party or counsel Add name of party or counsel

If counsel, add name of client If counsel, add name of client

Add date of signature Add date of signature

Add name of party or counsel Add name of party or counsel

If counsel, add name of client If counsel, add name of client

Add date of signature Add date of signature