

**UNITED STATES DISTRICT COURT
MIDDLE DISTRICT OF FLORIDA**

Choose Division

ENTER NAME(S),

PLAINTIFFS,

v.

CASE NO. ENTER CASE NUMBER

ENTER NAME(S),

DEFENDANTS.

CASE MANAGEMENT REPORT (ERISA CASES ONLY)

This Case Management Report shall be used in actions brought under the Employee Retirement Income Security Act of 1974 (ERISA), 29 U.S.C. sec. 1001, et seq. Based on this Report and availability on the Court’s calendar, the assigned United States Magistrate Judge will issue a binding Case Management and Scheduling Order.

1. **Meeting of Parties:** Pursuant to Local Rule 3.02(a)(1) a conference was held on _____ (date) between:

<u>Name</u>	<u>Counsel for (if applicable)</u>
_____	_____
_____	_____
_____	_____

2. Do parties agree to consent to the exercise of jurisdiction over this case by the assigned United States Magistrate Judge? (check one) yes no

If yes, the parties shall complete and all counsel and/or unrepresented parties shall execute on the Form AO-85 attached hereto (through the portion for "Consent" - all signatures together on one form); submit the same to the Clerk, and the Court will promptly thereafter enter the "Order of Reference" portion and file the same in the record hereof. (In the absence of consent, the Magistrate Judge will issue a Report and Recommendation to the District Judge)

3. **Preliminary Pretrial Conference:** Parties (check one) request do not request a preliminary pretrial conference before entry of a Case Management and Scheduling Order. Unresolved issues to be addressed at such a conference include:

4. **Case Plan:**

A. Date by which defendant will provide the administrative record to plaintiff:

B. Requested date by which dispositive motions or cross-briefs should be filed:

C. Requested date by which responses to dispositive motions or briefs should be filed:

D. Any requests for Special Consideration or Handling (requests can be joint or unilateral):

5. Do the parties request oral argument? yes no (The Magistrate Judge will make the final determination as to whether and when to set the case for oral argument).

6. **Mediation:**

Absent a Court order to the contrary, the parties in every case will participate in Court-annexed mediation as detailed in Chapter Four of the Court's Local Rules.

Do the parties wish to mediate yes no

If the parties agree to mediation, the order of referral to mediation described in Local Rule 4.03 should be entered by the Court directing that the mediation occur on or before _____ (date) designating _____ (name) to serve as mediator.

(A list of certified mediators is available from the Clerk's Office and on the Court's website. **If the parties have checked that they agree to mediate but have left either or both of these fields blank, the Court will designate the mediator and/or the deadline for mediation).**

Date: _____

Signatures of Counsel (with information required by Federal Rule Civil Procedure 11(a)
and Signature of any unrepresented party:

