

UNITED STATES DISTRICT COURT  
MIDDLE DISTRICT OF FLORIDA  
FORT MYERS DIVISION

Plaintiff,

v.

Case No. 2: -cv- -FtM-

Defendant.

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**CASE MANAGEMENT REPORT<sup>1</sup>**

The parties agree to these dates and discovery plan under Federal Rule of Civil Procedure 26 and Local Rule 3.05:

<b>DEADLINE</b>	<b>AGREED DATE</b>
<b>Corporate Disclosure Statements</b> [Due immediately upon each party's first appearance]	Plaintiff filed on <a href="#">Select Date</a> Defendant filed on <a href="#">Select Date</a>
<b>Rule 26(a)(1) Initial Disclosures</b> [Due 14 days after Rule 26(f) conference]	<input type="checkbox"/> Exchanged <input type="checkbox"/> To be exchanged by <a href="#">Select Date</a>
<b>Motions to Add Parties or Amend Pleadings</b> [Court recommends 1 to 2 months after the Rule 26(f) conference]	<a href="#">Select Date</a>
<b>Disclosure of Expert Reports</b> [Court recommends the last disclosure to occur 1 to 2 months before the discovery deadline]	Plaintiff: <a href="#">Select Date</a> Defendant (includes rebuttal): <a href="#">Select Date</a> Plaintiff Rebuttal: <a href="#">Select Date</a>
<b>Discovery</b>	<a href="#">Select Date</a>

<sup>1</sup> The Court is not responsible for a hyperlink's availability and functionality, and a failed hyperlink does not affect this Order.

DEADLINE	AGREED DATE
[Court recommends 6 to 8 months before the trial term so it can decide dispositive motions]	
<b>Dispositive and <i>Daubert</i> Motions</b> [Court recommends at least 4 months before the meeting to prepare the joint final pretrial statement]	Select Date
<b>Meeting in Person to Prepare Joint Final Pretrial Statement</b> [Court recommends 1 month before the Final Pretrial Conference]	Select Date
<b>Motions in Limine</b> [Court recommends 3 days before the deadline for Joint Final Pretrial Statement and Trial Briefs]	
<b>Joint Final Pretrial Statement and Trial Briefs</b> [Court recommends 3 weeks before the Final Pretrial Conference]	Select Date
<b>Final Pretrial Conference</b>	Select Date
<b>Monthly Trial Term</b> [Cases are scheduled for a monthly trial term—not a specific date. The Court recommends 20 to 22 months after the case is filed or removed]	Month Year
<b>Estimated Length of Trial</b>	Select days
<b>Jury or Non-Jury</b>	Select
<b>Mediation</b> [Court recommends mediation after the discovery deadline but before dispositive motions]	Deadline: Select Date Mediator:

DEADLINE	AGREED DATE
<b>Settlement</b>	<input type="checkbox"/> Likely <input type="checkbox"/> Unlikely
<b>All Parties Consent to the Assigned Magistrate Judge<sup>2</sup></b>	<input type="checkbox"/> For all purposes including trial <input type="checkbox"/> For some purposes like class certification, summary judgment, or motions for a final order or judgment (please list) <input type="checkbox"/> For no other purpose beyond authority granted by statute, rule, and referral
<b>All Parties Request a Settlement Conference with the Non-Assigned Magistrate Judge</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Likely to Request in Future
<b>Related Case Notice Completed and Attached</b> (Attachment A and available on the assigned district judge's website)	<input type="checkbox"/> Yes

**A. Preliminary Pretrial Conferences**

**For cases assigned to United States District Judge Sheri Polster Chappell,** the assigned Magistrate Judge will hold a preliminary pretrial conference (“PPTC”) in most cases after the parties file this Case Management Report. The parties should expect to discuss these topics at the PPTC: the facts, unique issues anticipated by counsel, the Court’s case management practices and procedures, deadlines to govern the case, prospects of settlement, pending motions, scope of discovery, need for expert witnesses, length of trial, and calendar conflicts. Unresolved issues to discuss at the PPTC include:

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<sup>2</sup> If the parties wish to voluntarily consent to the assigned Magistrate Judge, they must sign and file the form titled, “[Notice, Consent, and Reference of a Civil Action to a Magistrate Judge](#)” found on the Court’s website.

After the PPTC, the assigned Magistrate Judge will issue a Case Management and Scheduling Order to govern the case.

**For cases assigned to United States District Judge Thomas Barber and Senior United States District Judge John E. Steele**, a preliminary pretrial conference is mandatory only in Track Three cases. The Court will consider a request to re-track a Track Two case to a Track Three case only after a class is certified and/or motions to dismiss have been decided in complex actions. For Track Two cases, Judges Barber and Steele will issue Case Management and Scheduling Orders after the parties file a Case Management Report.

**B. Discovery**

The parties must **jointly** file—along with this Case Management Report and Related Case Notice—the “Pretrial & Discovery Plan” found on the assigned Magistrate Judge’s website. The Pretrial & Discovery Plan, Case Management Report, and Related Case Notice must be filed as **three separate docket entries**. The parties must also follow the [Discovery Handbook](#) for the Middle District of Florida available on the Court’s website.

**C. Mediation**

Without mandatory arbitration or a Court order otherwise, the parties in every case **must** participate in mediation. The parties must select a mediator from the Court’s [approved list of mediators](#) found on its website.

Date: \_\_\_\_\_

Signature of Counsel (per Local Rule 1.05) and Unrepresented Parties:

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_____	_____
_____	_____