

**IN THE UNITED STATES DISTRICT COURT  
FOR THE SOUTHERN DISTRICT OF NEW YORK**

against	Plaintiff,  Defendant.
---------	------------------------------

CIVIL ACTION NO.: \_\_\_\_\_

**CASE REPORT AND PROPOSED CASE MANAGEMENT PLAN FOR PRO SE CASE**

**1. Summary of Claims, Defenses, and Relevant Issues:**

Plaintiff/Defendant (circle one)

---

---

---

---

---

---

---

---

---

---

**2. I understand my obligation to preserve information relevant to this action and I am preserving that information now.**

Plaintiff/Defendant (circle one)

**3. Proposed Schedule**

All discovery must be completed by \_\_\_\_\_.

a. Initial Requests for Documents must be made by \_\_\_\_\_.

b. Depositions shall be completed by \_\_\_\_\_.

i. Neither party may take more than \_\_\_ depositions. Absent an agreement between the parties or an order from the Court, non-party depositions shall follow initial party depositions.

c. Documents from Third Parties (such as doctors) will/will not (circle one) be required. If required, the following are the Third Parties from whom the parties will request documents:

---

---

---

i. Subpoenas requesting documents from Third Parties must be served by \_\_\_\_\_. Any party that receives a production from a Third Party must provide a copy of that production to all other parties in this action.

d. There will/will not (circle one) be expert testimony in this case. If expert testimony will be needed, please describe the topic on which the expert(s) is expected to testify.

---

---

---

- i. Written reports by any expert(s) must be served on the other parties in this action by \_\_\_\_\_. Depositions of experts must be completed by \_\_\_\_\_.

**4. Early Settlement or Resolution**

The parties have/have not (circle one) discussed the possibility of settlement. The parties request a settlement conference by no later than \_\_\_\_\_. The following information is needed before settlement can be discussed:

---

---

---

**5. Other Matters**

Plaintiff/Defendant (circle one) wishes to discuss the following additional topics at the Initial Case Management Conference.

---

---

---

---

Respectfully submitted this \_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Counsel for \_\_\_\_\_ (if applicable)