THE BUSINESS COURT OF TEXAS, EIGHTH DIVISION

[Plaintiff(s)],	§	
Plaintiff(s),	§	
v.	§	
[Defendant(s)],	§	Cause No. [_____]
Defendant(s)	§	
	§	

INITIAL CASE STATUS REPORT

The parties submit this Initial Case Status Report for the Court's consideration. [Please restate each instruction before furnishing the information listed below.]

1. **Lead Attorneys.** Provide the names, bar numbers, mailing addresses, email addresses, and telephone numbers of the lead attorneys representing each party.

2. **Corporate Disclosure Obligations.** Identify all persons, associations of persons, firms, partnerships, corporations, guarantors, insurers, affiliates, parent corporations, or other legal entities who or which are financially interested in the outcome of the litigation. If a large group of persons or firms can be specified by a generic description, individual listing is not necessary. Each corporate-disclosure statement must also list the names of all law firms and/or counsel in the case. Governmental entities need not file a corporate-disclosure statement.

3. **Summary of the Case.** Provide a short joint summary of what this case is about. If the parties cannot agree on a joint summary, each side is allotted 100 words to give its own summary of the case.

4. **Governing Law.** State whether any party contends that the law of a jurisdiction other than Texas applies to this dispute, and if so, identify which jurisdiction and the basis for such contention.

5. **Claims and Relief Sought.** Identify the claims, counterclaims, cross-claims, and/or affirmative defenses asserted by and against each party.

6. **Jurisdiction and Venue.** Identify any challenges regarding personal jurisdiction, subject matter jurisdiction, or venue. Also identify any pleaded claims that fall exclusively within the Court's supplemental jurisdiction, *see* Tex. Gov't Code § 25A.004(f), and whether all parties consent to the Court hearing such claims.

7. **Principal Issues.** Identify the principal factual and legal issues in this case.

8. **Service.** State whether all defendants have been served or waived service of process. Identity any defendants that have not been served.

9. **Joinder of Additional Parties.** Identify any anticipated additional parties that should be included, when they can be added, and which current parties would seek to add them.

10. **Intervention.** Identify any parties you anticipate will intervene in this case.

11. **Initial Motions.** If either party anticipates filing an early-stage motion (e.g., motion to dismiss, application for temporary restraining order), briefly explain the basis for the motion and provide the projected date of filing.

12. **Initial Disclosures.** State whether each party has made the initial disclosures required by Texas Rule of Civil Procedure 194.2. If not, state when the disclosures will be made.

13. **Status of Discovery.** Identify the discovery conducted to date.

14. **Discovery Completion Date.** Estimate the date by which discovery can reasonably be completed.

15. **Discovery Issues.** Identify any anticipated issues with completing discovery.

16. **Confidentiality.** State whether any party anticipates the need for a protective order. If the parties agree that a protective order should be entered but do not agree on the terms, briefly explain the nature of the disagreement(s).

17. **Alternative Dispute Resolution.** State the ADR techniques reasonably suitable for this case and when such techniques may be effectively used (e.g., before discovery, after limited discovery, after motions are filed).

18. **Jury Demand.** State whether a jury demand has been made and if it was made on time.

19. **Other Matters.** Indicate other matters peculiar to this case, including discovery, that may deserve the special attention of the judge.

AGREED:

[add signature blocks]