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UNITED STATES DISTRICT COURT
WESTERN DISTRICT OF WASHINGTON

MELISSA TETREAULT,

Plaintiff,

v.

THE STANDARD INSURANCE
COMPANY, an Oregon corporation,

Defendant.

Case No. CV-17-00540-RSL

THIRD AMENDED STIPULATED
PROTECTIVE ORDER

The Parties agree to amend the previous stipulated protective order to include additional categories of document. Amendments are in bold and contained in section 2, below.

1. PURPOSES AND LIMITATIONS

Discovery in this action is likely to involve production of confidential, proprietary, or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the court to enter the following Stipulated Protective Order. The parties acknowledge that this agreement is consistent with LCR 26(c). It does not confer blanket protection on all disclosures or responses to discovery, the protection it affords from public disclosure and use extends only to the limited information or items that are entitled to

1 confidential treatment under the applicable legal principles, and it does not presumptively entitle
2 parties to file confidential information under seal.

3 2. “CONFIDENTIAL” MATERIAL

4 “Confidential” material shall include the following documents and tangible things
5 produced or otherwise exchanged: [The parties must include a list of specific documents such as
6 “company’s customer list” or “plaintiff’s medical records;” do not list broad categories of
7 documents such as “sensitive business material”].

8 Claims manuals or similar documents by any other name, as they are proprietary
9 business trade secrets; Training materials, as they are proprietary business trade
10 secrets; Employee compensation plan information, as it is proprietary business
11 trade secrets and its production potentially invades the privacy of third parties;
12 Employee personnel file documents to the extent they are held to be relevant and
13 discoverable by this Court, as the production of any such documents would
14 invade the privacy of third parties to this action.

15 Plaintiffs private Facebook Messenger conversations, as they contain sensitive
16 personal information about non-parties to this litigation, including minors, as well
17 as HIPAA protected patient information, and sensitive personal information of
18 3rd parties.

19 **Information related to Standard Insurance Company’s relationship with**
20 **MES or other third party vendors or independent medical providers, as**
21 **those relationships constitute proprietary business trade secrets; Information**
22 **related to Standard Insurance Company’s aggregated claim numbers and**
23 **statistics related to those claims to the extent they are held to be relevant and**
24 **discoverable by this Court, as such information constitutes proprietary**
25 **business trade secrets; Information related to Standard Insurance**
26

1 **Company's electronic and paper record keeping practices, as they constitute**
2 **proprietary business trade secrets.**

3 3. SCOPE

4 The protections conferred by this agreement cover not only confidential material (as
5 defined above), but also (1) any information copied or extracted from confidential material; (2)
6 all copies, excerpts, summaries, or compilations of confidential material; and (3) any testimony,
7 conversations, or presentations by parties or their counsel that might reveal confidential material.

8 However, the protections conferred by this agreement do not cover information that is in
9 the public domain or becomes part of the public domain through trial or otherwise.

10 4. ACCESS TO AND USE OF CONFIDENTIAL MATERIAL

11 4.1 Basic Principles. A receiving party may use confidential material that is disclosed
12 or produced by another party or by a non-party in connection with this case only for prosecuting,
13 defending, or attempting to settle this litigation. Confidential material may be disclosed only to
14 the categories of persons and under the conditions described in this agreement. Confidential
15 material must be stored and maintained by a receiving party at a location and in a secure manner
16 that ensures that access is limited to the persons authorized under this agreement.

17 4.2 Disclosure of "CONFIDENTIAL" Information or Items. Unless otherwise
18 ordered by the court or permitted in writing by the designating party, a receiving party may
19 disclose any confidential material only to:

20 (a) the receiving party's counsel of record in this action, as well as employees
21 of counsel to whom it is reasonably necessary to disclose the information for this litigation;

22 (b) the officers, directors, and employees (including in house counsel) of the
23 receiving party to whom disclosure is reasonably necessary for this litigation, unless the parties
24 agree that a particular document or material produced is for Attorney's Eyes Only and is so
25 designated;

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1 (c) experts and consultants to whom disclosure is reasonably necessary for
2 this litigation and who have signed the "Acknowledgment and Agreement to Be Bound" (Exhibit
3 A);

4 (d) the court, court personnel, and court reporters and their staff;

5 (e) copy or imaging services retained by counsel to assist in the duplication of
6 confidential material, provided that counsel for the party retaining the copy or imaging service
7 instructs the service not to disclose any confidential material to third parties and to immediately
8 return all originals and copies of any confidential material;

9 (f) during their depositions, witnesses in the action to whom disclosure is
10 reasonably necessary and who have signed the "Acknowledgment and Agreement to Be Bound"
11 (Exhibit A), unless otherwise agreed by the designating party or ordered by the court. Pages of
12 transcribed deposition testimony or exhibits to depositions that reveal confidential material must
13 be separately bound by the court reporter and may not be disclosed to anyone except as permitted
14 under this agreement;

15 (g) the author or recipient of a document containing the information or a
16 custodian or other person who otherwise possessed or knew the information.

17 (h) any mediator retained by the parties in this matter.

18 4.3 Filing Confidential Material. Before filing confidential material or discussing or
19 referencing such material in court filings, the filing party shall confer with the designating party
20 to determine whether the designating party will remove the confidential designation, whether the
21 document can be redacted, or whether a motion to seal or stipulation and proposed order is
22 warranted. Local Civil Rule 5(g) sets forth the procedures that must be followed and the
23 standards that will be applied when a party seeks permission from the court to file material under
24 seal.

1 5. DESIGNATING PROTECTED MATERIAL

2 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each party
3 or non-party that designates information or items for protection under this agreement must take
4 care to limit any such designation to specific material that qualifies under the appropriate
5 standards. The designating party must designate for protection only those parts of material,
6 documents, items, or oral or written communications that qualify, so that other portions of the
7 material, documents, items, or communications for which protection is not warranted are not
8 swept unjustifiably within the ambit of this agreement.

9 Mass, indiscriminate, or routinized designations are prohibited. Designations that are
10 shown to be clearly unjustified or that have been made for an improper purpose (*e.g.*, to
11 unnecessarily encumber or delay the case development process or to impose unnecessary
12 expenses and burdens on other parties) expose the designating party to sanctions.

13 If it comes to a designating party's attention that information or items that it designated
14 for protection do not qualify for protection, the designating party must promptly notify all other
15 parties that it is withdrawing the mistaken designation.

16 5.2 Manner and Timing of Designations. Except as otherwise provided in this
17 agreement (see, *e.g.*, second paragraph of section 5.2(a) below), or as otherwise stipulated or
18 ordered, disclosure or discovery material that qualifies for protection under this agreement must
19 be clearly so designated before or when the material is disclosed or produced.

20 (a) Information in documentary form: (*e.g.*, paper or electronic documents
21 and deposition exhibits, but excluding transcripts of depositions or other pretrial or trial
22 proceedings), the designating party must affix the word "CONFIDENTIAL" to each page that
23 contains confidential material. If only a portion or portions of the material on a page qualifies for
24 protection, the producing party also must clearly identify the protected portion(s) (*e.g.*, by
25 making appropriate markings in the margins).

1 (b) Testimony given in deposition or in other pretrial proceedings: the parties
2 and any participating non-parties must identify on the record, during the deposition or other
3 pretrial proceeding, all protected testimony, without prejudice to their right to so designate other
4 testimony after reviewing the transcript. Any party or non-party may, within fifteen days after
5 receiving the transcript of the deposition or other pretrial proceeding, designate portions of the
6 transcript, or exhibits thereto, as confidential. If a party or non-party desires to protect
7 confidential information at trial, the issue should be addressed during the pre-trial conference.

8 (c) Other tangible items: the producing party must affix in a prominent place
9 on the exterior of the container or containers in which the information or item is stored the word
10 "CONFIDENTIAL." If only a portion or portions of the information or item warrant protection,
11 the producing party, to the extent practicable, shall identify the protected portion(s).

12 5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to
13 designate qualified information or items does not, standing alone, waive the designating party's
14 right to secure protection under this agreement for such material. Upon timely correction of a
15 designation, the receiving party must make reasonable efforts to ensure that the material is
16 treated in accordance with the provisions of this agreement.

17 6. CHALLENGING CONFIDENTIALITY DESIGNATIONS

18 6.1 Timing of Challenges. Any party or non-party may challenge a designation of
19 confidentiality at any time. Unless a prompt challenge to a designating party's confidentiality
20 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic
21 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to
22 challenge a confidentiality designation by electing not to mount a challenge promptly after the
23 original designation is disclosed.

24 6.2 Meet and Confer. The parties must make every attempt to resolve any dispute
25 regarding confidential designations without court involvement. Any motion regarding
26 confidential designations or for a protective order must include a certification, in the motion or in

1 a declaration or affidavit, that the movant has engaged in a good faith meet and confer
2 conference with other affected parties in an effort to resolve the dispute without court action. The
3 certification must list the date, manner, and participants to the conference. A good faith effort to
4 confer requires a face-to-face meeting or a telephone conference.

5 6.3 Judicial Intervention. If the parties cannot resolve a challenge without court
6 intervention, the designating party may file and serve a motion to retain confidentiality under
7 Local Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable). The burden of
8 persuasion in any such motion shall be on the designating party. Frivolous challenges, and those
9 made for an improper purpose (*e.g.*, to harass or impose unnecessary expenses and burdens on
10 other parties) may expose the challenging party to sanctions. All parties shall continue to
11 maintain the material in question as confidential until the court rules on the challenge.

12 7. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN OTHER
13 LITIGATION

14 If a party is served with a subpoena or a court order issued in other litigation that compels
15 disclosure of any information or items designated in this action as “CONFIDENTIAL,” that
16 party must:

17 (a) promptly notify the designating party in writing and include a copy of the
18 subpoena or court order;

19 (b) promptly notify in writing the party who caused the subpoena or order to
20 issue in the other litigation that some or all of the material covered by the subpoena or order is
21 subject to this agreement. Such notification shall include a copy of this agreement; and

22 (c) cooperate with respect to all reasonable procedures sought to be pursued
23 by the designating party whose confidential material may be affected.

24 8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

25 If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential
26 material to any person or in any circumstance not authorized under this agreement, the receiving

1 party must immediately (a) notify in writing the designating party of the unauthorized
2 disclosures, (b) use its best efforts to retrieve all unauthorized copies of the protected material,
3 (c) inform the person or persons to whom unauthorized disclosures were made of all the terms of
4 this agreement, and (d) request that such person or persons execute the "Acknowledgment and
5 Agreement to Be Bound" that is attached hereto as Exhibit A.

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7 9. NON TERMINATION AND RETURN OF DOCUMENTS

8 Within 60 days after the termination of this action, including all appeals, each receiving
9 party must return all confidential material to the producing party, including all copies, extracts
10 and summaries thereof. Alternatively, the parties may agree upon appropriate methods of
11 destruction.

12 Notwithstanding this provision, counsel are entitled to retain one archival copy of all
13 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,
14 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert
15 work product, even if such materials contain confidential material.

16 The confidentiality obligations imposed by this agreement shall remain in effect until a
17 designating party agrees otherwise in writing or a court orders otherwise.

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20 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

21 DATED: February 12, 2018

/s/ David P. Roosa
David P. Roosa

Attorneys for Plaintiff

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23
24 DATED: February 12, 2018

/s/ Stacy M. Tucker
Stacy M. Tucker

Attorneys for Defendant

1 PURSUANT TO STIPULATION, IT IS SO ORDERED

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3 DATED: Feb. 21, 2018

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5 Hon. Robert S. Lasnik,
6 United States District Court Judge

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EXHIBIT A

ACKNOWLEDGMENT AND AGREEMENT TO BE BOUND

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3 I, _____ [print or type full name], of
4 _____ [print or type full address], declare under penalty of
5 perjury that I have read in its entirety and understand the Stipulated Protective Order that was
6 issued by the United States District Court for the Western District of Washington on [date] in the
7 case of _____ [insert formal name of the case and the number and initials
8 assigned to it by the court]. I agree to comply with and to be bound by all the terms of this
9 Stipulated Protective Order and I understand and acknowledge that failure to so comply could
10 expose me to sanctions and punishment in the nature of contempt. I solemnly promise that I will
11 not disclose in any manner any information or item that is subject to this Stipulated Protective
12 Order to any person or entity except in strict compliance with the provisions of this Order.

13 I further agree to submit to the jurisdiction of the United States District Court for the
14 Western District of Washington for the purpose of enforcing the terms of this Stipulated
15 Protective Order, even if such enforcement proceedings occur after termination of this action.

16 Date: _____

17 City and State where sworn and signed: _____

18 Printed name: _____

19 Signature: _____

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