

UNITED STATES DISTRICT COURT
WESTERN DISTRICT OF KENTUCKY
LOUISVILLE DIVISION

ESTATE OF JOANNE BARROWS, SUSAN
HAGOOD, SHARON MERKLEY, LORRAINE
KOHL, and DOLLY BALANI, individually and on
behalf of all others similarly situated,

Plaintiffs,

v.

HUMANA INC.,

Defendant.

Civil Action No. 3:23-cv-00654-RGJ-CHL

JOINT STATUS REPORT

Plaintiffs the Estate of Joanne Barrows, Susan Hagood, Sharon Merkley, Lorraine Kohl, and Dolly Balani (together, “Plaintiffs”) and Defendant Humana Inc. (“Defendant”) (collectively, the “Parties”) respectfully submit the following joint status report pursuant to the Court’s October 10, 2025 Scheduling Order (ECF No. 91) and May 20, 2026 Order (ECF No. 126). This joint status report reflects case developments since the last joint status report, filed on April 9 (ECF No. 123).¹

1. Written Discovery.

- a. On April 17, 2026, Hanisha Balani, Karishma Balani, Chris Hagood, Lesli Kramer, William Kramer, Tim Merkley, and Pat Michalkiewicz, who are family members and/or personal representatives of Plaintiffs identified in Plaintiffs’ Rule 26 disclosures and in discovery responses and each of whom are represented by

¹ At the status conference held May 20, 2026, the Court excused the Parties from filing a joint status report in May and ordered that the next such report be filed on July 10, 2026 (ECF No. 126).

undersigned counsel for Plaintiffs (collectively, “Plaintiffs’ Family Members”), each served responses and objections to Defendant’s Subpoena duces tecum.

- b. On April 29, 2026, Claire Harvey, Derek Dawes, and Monica Finocchiaro, who are former employees of naviHealth, Inc. (“naviHealth”) identified in Plaintiffs’ discovery responses and each of whom are represented by undersigned counsel for Plaintiffs (collectively, the “Former naviHealth Employees”), each served responses and objections to Defendant’s Subpoena duces tecum.
- c. Also on April 29, 2026, naviHealth served its responses and objections to Plaintiffs’ Subpoena duces tecum.
- d. On April 30, 2026, Defendant served its responses and objections to Plaintiffs’ Second Set of Requests for Production on Defendant.

2. Productions.

- a. Defendant made its ninth production on April 17, 2026, its tenth production on April 30, 2026, its eleventh production on May 1, 2026, its twelfth production on May 6, 2026, its thirteenth production on June 30, 2026, and its fourteenth production on July 1, 2026. Defendant’s fourteenth production completed Defendant’s rolling production of emails responsive to Plaintiffs’ First Set of Requests for Production, in accordance with Defendant’s Responses and Objections to Plaintiffs’ First Set of Requests for Production (served December 12, 2025). Additionally, Defendant represents that its fourteenth production substantially completed Defendant’s production of emails responsive to Plaintiffs’ Second Set of Requests for Production in accordance with Defendant’s

Responses and Objections to Plaintiffs' Second Set of Requests for Production (served April 30, 2026).

- b. Plaintiffs' Family Members made their first production of documents in response to Defendant's subpoenas on May 26, 2026.
- c. The Former naviHealth Employees made their first production of documents in response to Defendant's subpoenas on May 28, 2026.

3. Joint Motion to Amend Scheduling Order

- a. During the May 20, 2026, status conference, Plaintiffs informed the Court of the need for an extension to the schedule. The Court ordered that "[a]ny joint or unilateral motion for extension of deadlines shall be filed on or before 6/8/2026" (ECF No. 126).
- b. On June 8, 2026, Plaintiffs and Defendant filed a Joint Motion to Amend Scheduling Order (ECF No. 127), a Memorandum in Support of Joint Motion to Amend Scheduling Order (ECF No. 127-1), and a [Proposed] Agreed Order (ECF No. 127-2).
- c. The Parties await the Court's decision on these amendments to the Court's prior October 10, 2025 Scheduling Order (ECF No. 91).

4. Depositions

- a. During a meet and confer held on May 11, 2026, Defendant informed Plaintiffs that it would seek to depose the named Plaintiffs and some number of Plaintiffs' Family Members, that it may seek to depose the Former naviHealth Employees, and that it would seek to take all of these depositions shortly after Plaintiffs file their Motion

for Class Certification. Plaintiffs reserve all rights and objections with respect to any such depositions.

- b. On May 22, 2026, Plaintiffs served their Fed. R. Civ. P. 30(b)(6) Notice of Taking the Deposition of Defendant Humana Inc. on Defendant.
- c. On June 22, 2026, Defendant's served its Responses and Objections to Plaintiffs' Notice of Rule 30(b)(6) Deposition on Plaintiffs.

The Parties are presently on track to meet the deadlines proposed in the Joint Motion to Amend the Scheduling Order (ECF No. 127).

Dated: July 10, 2026

Respectfully submitted,

/s/ Simeon A. Morbey (w/ permission)

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