

Life Care / Mitigation

Case: test-case-5-6143587d0932ce510d808ba396be34fb · Report Type: life_care_mitigation

Version 2.0.0 · Generated 2026-08-02T 18:01:16+00:00 · RITA V1.3.1

Record-based mitigation inventory — source-linked extracts only. No medical opinions, MMI conclusions, impairment ratings, life-care cost projections, vocational opinions, or legal conclusions. Severity: ● High, ● Moderate, ● Low. Domain status: ● documented, ● partial/pending, ● missing

STANDARD TIER — Record-Based Mitigation Inventory

Counsel Quick-Use Summary

- 4 high-severity gap(s) — lead with: Missing bills / charge detail
- Top weakness: ● High Missing bills / charge detail
- Compliance score 52/100 — Weak compliance — multiple gaps indexed in chronology
- Priority verify: Missing bills / charge detail

Report Scope & Purpose Standard Record-Based

Record-based mitigation inventory linking chronology events to documented mitigation actions, functional signals, work capacity, and pharmacy patterns

Index injury date: 01/08/2024

Encounter span: 12/15/2023 to 04/10/2024

Records reviewed: 22

Records reviewed

- BATES-000002
- BATES-000003
- BATES-000004
- BATES-000005
- BATES-000006
- BATES-000007
- BATES-000008
- BATES-000009
- BATES-000010
- BATES-000011

- BATES-000012
- BATES-000013
- BATES-000014
- BATES-000015
- BATES-000017
- BATES-000018
- BATES-000019
- BATES-000020
- BATES-000021
- BATES-000023

What this report does NOT do

- Medical necessity or causation opinions
- MMI or impairment ratings
- Future life-care cost projections
- Vocational or earning-capacity opinions
- Legal merit or liability conclusions

Mitigation Executive Summary Standard

- Mitigation actions documented: 8 across 22 encounter(s)
- Mitigation gaps flagged: 6 (2 declared / 4 implied)
- Functional trajectory: Plateau documented: PT / functional plateau documented at 04/05/2024
- Pain trajectory: Acute → escalation → regression → plateau
- Work capacity: 3 RTW/restriction entry(ies); 1 FCE signal(s); 0 employer communication(s)
- Pharmacy pattern: 11 fill(s); opioid 4, NSAID 6, gabapentinoid 1; refill signals 3; multi-pharmacy yes
- Record-based compliance score: 52/100 — Weak compliance — multiple gaps indexed in chronology

Mitigation Timeline Snapshot Standard

First-documented milestone dates from chronology — index injury through MMI when indexed.

Milestone	Date	Bates
Index injury	01/08/2024	BATES-000002

Milestone	Date	Bates
First care (post-index)	01/08/2024	BATES-000002
First imaging	01/19/2024	BATES-000004
First PT	02/08/2024	BATES-000009
First injection	01/19/2024	BATES-000004
Hospitalization	01/19/2024	BATES-000004
Functional plateau	04/05/2024	BATES-000023
MMI	04/10/2024	BATES-000024

Unified Metrics

Standard

Single source: 22 encounter(s) · 8 action(s) · 6 gap(s) · 6 functional signal(s) · 13 pain entries · 11 pharmacy fill(s) · 0 phase(s) · compliance **52/100** · weighted completion 85% · core completion 100%

Data integrity score: 86/100 · 86% complete metadata · 0% missing DOS · 41% missing provider · 45% missing facility

Mitigation Dashboard

Standard

Dashboard: 8 actions · 6 gaps · compliance 52/100 · weighted completion 85%

ACTIONS 8	GAPS 6	COMPLIANCE 52/100
WEIGHTED COMPLETION 85%	ENCOUNTERS 22	PHARMACY FILLS 11
TOP STRENGTHS - Early PT documented at 02/08/2024 (within ~45 days post-index) - Injection/intervention milestone at 01/19/2024 - Pharmacy fill pattern with documented refill/adherence signals		
TOP WEAKNESSES		

- High Missing bills / charge detail
- High Missing hospitalization itemization
- High Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 | Purpose: NO-SHOW / MISSED...

Mitigation Compliance Score

Standard

52/100

Weak compliance — multiple gaps indexed in chronology

Compliance score 52/100 — Multiple compliance gaps or delays are indexed (40–59 band); verify production completeness

Deductions: missed appointments -16, delayed care -12, multi-pharmacy pattern -10, pt language without indexed compliance -10

How to read this table: Starts at 100; deductions apply for missed appointments, delayed care, pharmacy patterns, and related chronology language. See breakdown table — not a legal or medical opinion

Factor	Impact	Count
Missed appointments	-16	2
Delayed care	-12	2
Multi-pharmacy pattern	-10	1
PT language without indexed compliance	-10	1

Mitigation Domains Overview

Standard

5 domain(s) at a glance — see Standard tier tables for detail

Domain	Status	Count	Summary
Medical follow-up	● documented	8	8 mitigation action(s) indexed
Functional	● documented	6	Plateau documented: PT / functional plateau documented at 04/05/2024
Work capacity	● documented	3	3 RTW/restriction entry(ies); 1 FCE signal(s); 0 employer communication(s)
Pharmacy	● documented	11	11 fill(s); opioid 4, NSAID 6, gabapentinoid 1; refill signals 3; multi-pharmacy yes
Verification gaps	● pending	6	2 declared and 4 implied mitigation gap(s) inventoried

Bates Summary Table [Source-Linked](#)

Bates references indexed across mitigation sections — counsel should verify production.

Grouped ranges: BATES-000001 through BATES-000004; BATES-000006 through BATES-000007; BATES-000009 through BATES-000015; BATES-000017 through BATES-000018; BATES-000020 through BATES-000021; BATES-000023 through BATES-000024

Bates	Corresponds to	Section
BATES-000004	Injection / intervention	Mitigation Actions
BATES-000009	Physical therapy; Home exercise program	Mitigation Actions
BATES-000010	Physical therapy	Mitigation Actions
BATES-000012	Injection / intervention	Mitigation Actions
BATES-000013	Physical therapy	Mitigation Actions
BATES-000017	Injection / intervention	Mitigation Actions

Bates	Corresponds to	Section
BATES-000023	Physical therapy; Home exercise program	Mitigation Actions
BATES-000024	Home exercise program; Injection / intervention	Mitigation Actions
BATES-000003	Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purp	Mitigation Gaps
BATES-000018	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose	Mitigation Gaps
BATES-000002	Pain Trajectory	Pain Trajectory
BATES-000006	Pain Trajectory	Pain Trajectory
BATES-000007	Pain Trajectory	Pain Trajectory
BATES-000014	Pain Trajectory	Pain Trajectory
BATES-000020	Pain Trajectory	Pain Trajectory
BATES-000001	Pain Trajectory	Pain Trajectory
BATES-000011	Pharmacy	Pharmacy
BATES-000015	Pharmacy	Pharmacy
BATES-000021	Pharmacy	Pharmacy

How to Use This Report

Counsel Interpretation Guide: Use Standard tier for Bates-linked factual inventory in discovery and deposition prep. Premium tier adds verification pathways, risk flags, and counsel follow-up — not expert substitutes. Cross-check every indexed row against complete medical production before citing in briefs

Standard tier

Record-based mitigation inventory: actions, gaps, functional/pain/work/pharmacy signals, and Bates-linked extracts. Factual only — no opinions or cost projections

Premium tier

Forward-looking verification pathways, risk flags, domain gaps, completion matrix, counsel risk exposure, and follow-up checklist. References Standard metrics — does not duplicate tables

Mitigation Strengths vs Weaknesses

Record-based strengths and consolidated gaps side by side — severity icons indicate indexed priority.

Strengths	Weaknesses
Early PT documented at 02/08/2024 (within ~45 days post-index)	● High Missing bills / charge detail
Injection/intervention milestone at 01/19/2024	● High Missing hospitalization itemization
Pharmacy fill pattern with documented refill/adherence signals	● High Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purpose: NO-SHOW / MISSED...
Functional plateau language indexed: PT / functional plateau documented at 04/05/2024	● Moderate Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Purpose: MRI review; delayed...
MMI endpoint documented at 04/10/2024	● High Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed...
8 mitigation action(s) Bates-linked in chronology	● Moderate Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7...
—	● No early orthopedic consult language in initial chronology segment
—	● Opioid language without indexed pharmacy counseling / adherence notes
—	● Compliance score 52/100 — mixed/weak band per chronology language

Mitigation Opportunities Missed Record-Based

Record-absence prompts — not medical necessity opinions; counsel may verify whether indexed care could have occurred earlier.

Opportunity	Description	Why it matters	Counsel may verify	Window	Basis
Early ortho	No early orthopedic consult language in initial chronology segment	Record absence may affect mitigation timing narrative	Orthopedic consult notes within acute/subacute window	early post-index	record absence
Pharmacy counseling	Opioid language without indexed pharmacy counseling / adherence notes	Missing counseling documentation may affect pharmacy mitigation framing	Pharmacy counseling, PDMP, and prescriber monitoring notes	early post-index	record absence

Mitigation Completion by Phase

8 action(s) across 4 phase(s) (matches Actions Documented: 8)

Phase	Actions	Gap refs	Status	Summary
Pre-index (01/07/2024)	0	0	missing	0 mitigation action(s) indexed
Acute (01/08/2024–01/22/2024)	1	0	partial	1 mitigation action(s) indexed
Subacute (01/22/2024–04/07/2024)	5	0	partial	5 mitigation action(s) indexed
Hospitalization (03/05/2024–03/09/2024)	1	1	partial	1 mitigation action(s) indexed; 1 gap reference(s)
Post-Hospital / MMI (03/09/2024–04/10/2024)	1	0	partial	1 mitigation action(s) indexed

Mitigation Trajectory

Text curves derived from indexed functional and pain language — not projections.

Functional recovery curve

Severe → Moderate → Mild → Plateau

Plateau documented: PT / functional plateau documented at 04/05/2024

Mitigation Actions Documented

StandardSource-Linked

8 action(s) across 4 phase(s) (1 in Acute, 1 in Hospitalization, 1 in Post-Hospital / MMI, 5 in Subacute)

DOS	Facility	Provider	Provider Status	Action	Mitigation Value	Phase	Bates
01/19/2024	Metro General Hospital	—	Unassigned	Injection / intervention	Injection / intervention	Acute (01/08/2024–01/22/2024)	BATES-000004
02/08/2024	Peak Motion Physical Therapy	J. Ruiz, DPT	Documented	Physical therapy; Home exercise program	Physical therapy; Home exercise program	Subacute (01/22/2024–04/07/2024)	BATES-000009
02/12/2024	—	J. Ruiz, DPT	Documented	Physical therapy	Physical therapy	Subacute (01/22/2024–04/07/2024)	BATES-000010
02/18/2024	—	—	Unassigned	Injection / intervention	Injection / intervention	Subacute (01/22/2024–04/07/2024)	BATES-000012
02/22/2024	—	—	Unassigned	Physical therapy	Physical therapy	Subacute (01/22/2024–04/07/2024)	BATES-000013

DOS	Facility	Provider	Provider Status	Action	Mitigation Value	Phase	Bates
03/05/2024	Metro General Hospital	—	Unassigned	Injection / intervention	Injection / intervention	Hospitalization (03/05/2024–03/09/2024)	BATES-000017
04/05/2024	—	J. Ruiz, DPT	Documented	Physical therapy; Home exercise program	Physical therapy; Home exercise program	Subacute (01/22/2024–04/07/2024)	BATES-000023
04/10/2024	—	M. Harlan, MD	Documented	Home exercise program; Injection / intervention	Home exercise program; Injection / intervention	Post-Hospital / MMI (03/09/2024–04/10/2024)	BATES-000024

Mitigation actions extracted from chronology language with Bates linkage

Mitigation Gaps (Declared + Implied)

Standard

6 gap(s) — 2 declared, 4 implied

2 declared and 4 implied mitigation gap(s) inventoried

Origin	Gap Type	Severity	DOS	Description	Gap Impact	Bates
declared	Documentation	● High	—	Missing bills / charge detail	Affects economic damages completeness	—
declared	Documentation	● High	—	Missing hospitalization itemization	Affects hospital economic damages	—

Origin	Gap Type	Severity	DOS	Description	Gap Impact	Bates
implied	Care	● High	01/12/2024	Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purpose: NO-SHOW / MISSED APPOINTMENT (care-gap) Riverside...	Missed or delayed care may affect mitigation completion narrative	BATES-000003
implied	Imaging	● Moderate	02/18/2024	Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Purpose: MRI review; delayed neurology for hand tingling...	Missed or delayed care may affect mitigation completion narrative	BATES-000012
implied	Care	● High	02/22/2024	Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed appointment + regression language...	Missed or delayed care may affect mitigation completion narrative	BATES-000013

Origin	Gap Type	Severity	DOS	Description	Gap Impact	Bates
implied	Care	Moderate	03/11/2024	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after paresthesias) Metro...	Missed or delayed care may affect mitigation completion narrative	BATES-000018

Functional Recovery Curve

Standard

6 functional signal(s) indexed across treatment phases

Plateau documented: PT / functional plateau documented at 04/05/2024

DOS	Signal	Severity	Classification	Finding	Phase	Bates
01/19/2024	ROM	Severe	active limitation	ED: MOI...	Acute (01/08/2024–01/22/2024)	BATES-000004
02/08/2024	ROM, strength, sleep	Moderate	sleep impact	PT eval +...	Subacute (01/22/2024–04/07/2024)	BATES-000009
02/12/2024	ROM	Mild	active limitation	Session improvement...	Subacute (01/22/2024–04/07/2024)	BATES-000010
02/22/2024	ROM	Moderate	active limitation	Missed appointment +...	Subacute (01/22/2024–04/07/2024)	BATES-000013

DOS	Signal	Severity	Classification	Finding	Phase	Bates
03/11/2024	ROM	Moderate	active limitation	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after...	Subacute (01/22/2024–04/07/2024)	BATES-000018
04/05/2024	ROM, strength, work capacity	Mild	work capacity		Subacute (01/22/2024–04/07/2024)	BATES-000023

Pain Mitigation Curve

Standard

13 pain trajectory entry(ies) with Bates linkage

Curve: Acute → escalation → regression → plateau

Mitigation correlation: No pain/compliance co-occurrence language indexed

DOS	Pain score	Pattern	Plateau	Excerpt	Bates
01/08/2024	—	Escalation	—	Urgent Care Visit — ENCOUNTER 02 — Urgent Care Visit Date: 01/08/2024 Purpose: Index fall; mild shoulder/hip; no imagi	BATES-000002

DOS	Pain score	Pattern	Plateau	Excerpt	Bates
01/19/2024	—	Escalation	—	EMERGENCY Department Visit — ENCOUNTER 04 — EMERGENCY Department Visit Date: 01/19/2024 Purpose: ED: MOI contradiction	BATES-000004
01/20/2024	—	Documented	—	Pharmacy Fill Record — ENCOUNTER 06 — Pharmacy Fill Record Date: 01/20/2024 Purpose: CVS initial opioid + NSAID (days	BATES-000006
01/24/2024	—	Documented	—	Orthopedic Clinic — ENCOUNTER 07 — Orthopedic Clinic Date: 01/24/2024 Purpose: Ortho eval; MRI + PT ordered BATES- 0000	BATES-000007
02/08/2024	8/10	Documented	—	Physical Therapy Evaluation — ENCOUNTER 09 — Physical Therapy Evaluation Date: 02/08/2024 Purpose: PT eval + multi-ses	BATES-000009

DOS	Pain score	Pattern	Plateau	Excerpt	Bates
02/12/2024	5/10	Regression	—	Physical Therapy Progress — ENCOUNTER 10 — Physical Therapy Progress Date: 02/12/2024 Purpose: Session improvement BAT	BATES-000010
02/22/2024	7/10	Documented	—	Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed appointment + re	BATES-000013
03/01/2024	—	Escalation	—	Urgent Care Visit — ENCOUNTER 14 — Urgent Care Visit Date: 03/01/2024 Purpose: Acute flare; abnormal vitals not escala	BATES-000014
03/11/2024	—	Documented	—	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after p	BATES-000018
03/18/2024	—	Documented	—	MRI Hip (Out-of-Order Date Stress) — ENCOUNTER 20 — MRI Hip (Out-of-Order Date Stress) Date: 03/18/2024 Purpose: Hip M	BATES-000020

DOS	Pain score	Pattern	Plateau	Excerpt	Bates
04/05/2024	4/10	Plateau	yes	Physical Therapy Progress — Plateau / MMI path — ENCOUNTER 23 — Physical Therapy Progress — Plateau / MMI path Date: 04/	BATES-000023
04/10/2024	—	Regression	—	Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 Purpose: MMI reached; retu	BATES-000024
12/15/2023	—	Documented	—	Primary Care — Pre-Existing — ENCOUNTER 01 — Primary Care — Pre-Existing Date: 12/15/2023 Purpose: Pre-index chronic L	BATES-000001

Work Capacity Mitigation Summary

Standard

3 RTW/restriction row(s); MMI 04/10/2024

3 RTW/restriction entry(ies); 1 FCE signal(s); 0 employer communication(s)

MMI date: 04/10/2024

Restriction compliance: Work restrictions documented across chronology

Employer comm: No employer communication language indexed

DOS	RTW status	Restriction type	Language	Bates
01/24/2024	light duty	Transitional restriction (PT phase)	Orthopedic Clinic — ENCOUNTER 07 — Orthopedic Clinic Date: 01/24/2024 Purpose: Ortho eval; MRI + PT ordered BATES-0000	BATES-000007
04/05/2024	restriction	Work restriction	Physical Therapy Progress — Plateau / MMI path — ENCOUNTER 23 — Physical Therapy Progress — Plateau / MMI path Date: 04/	BATES-000023
04/10/2024	restriction	Permanent restriction	Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 Purpose: MMI reached; retu	BATES-000024

Pharmacy Mitigation Summary

Standard

- 11 pharmacy fill(s) across indexed chronology
- 11 fill(s); opioid 4, NSAID 6, gabapentinoid 1; refill signals 3; multi-pharmacy yes

Refill/adherence language documented

DOS	Medication	Opioid	NSAID	Gabapentinoid	Refill	Adherence	Bates
01/08/2024	(patient reported): - Lisinopril 10 mg PO daily - Atorvastatin 20 mg PO nightly...	—	yes	—	—	not documented	BATES-000002
01/19/2024	Toradol 30 mg IM; Acetaminophen 1,000 mg PO; Zorpedrine 5 mg IV	yes	yes	—	—	not documented	BATES-000004
01/20/2024	Hydrocodone-Acetaminophen 5-325 mg; Ibuprofen 800 mg	yes	yes	—	yes	documented	BATES-000006
01/24/2024	Lisinopril 10 mg qhs; APAP 5-325 PRN (from ED) - Ibuprofen 800 mg TID; daily -...	yes	yes	—	—	not documented	BATES-000007
02/14/2024	Cyclobenzaprine 10 mg; Hydrocodone-Acetaminophen 5-325 mg	yes	—	—	yes	documented	BATES-000011

DOS	Medication	Opioid	NSAID	Gabapentinoid	Refill	Adherence	Bates
02/18/2024	Gastrozex; Painsolve	—	—	—	—	not documented	BATES-000012
03/01/2024	Ketorolac 60 mg IM; Toradol 60 mg	—	yes	—	—	not documented	BATES-000014
03/02/2024	Ibuprofen 800 mg; ondansetron 4 mg	—	yes	—	yes	documented	BATES-000015
03/05/2024	Vancomycin 1 g IV; Cefepime 2 g IV	—	—	—	—	not documented	BATES-000017
03/20/2024	Pharmacy Fill Record — ENCOUNTER 21 — Pharmacy Fill Record D	—	—	yes	—	not documented	BATES-000021
12/15/2023	Lisinopril 10 mg PO daily; Atorvastatin 20 mg PO	—	—	—	—	not documented	BATES-000001

Summary of Mitigation Status Standard

Standard-tier closing inventory counts and factual span summary.

- Encounters reviewed: 22
- Mitigation actions documented: 8
- Mitigation gaps flagged: 6
- Functional mitigation signals: 6

- Pain trajectory entries: 13
- Work / RTW entries: 3
- Pharmacy fill entries: 11

Chronology review from index injury (01/08/2024) through 04/10/2024 documents 8 mitigation action(s), 6 gap(s), and linked functional, pain, work, and pharmacy signals

Data Integrity Notes

- Data integrity score 86/100 — 0% missing DOS, 41% missing provider, 45% missing facility
- 41% of encounters missing provider name in extract
- Billing or itemized charge gaps flagged in chronology/limitations

Premium Overview

Premium

PREMIUM

Premium tier enabled — 8 expansion section(s)

References Standard inventory (8 actions, 6 gaps)

Detailed Standard-tier tables are not duplicated here — use Standard sections for Bates-linked rows

Forward-Looking Mitigation Pathways

Premium

ready

PREMIUM

Record-based verification prompts — references Standard metrics without duplicating action/gap tables.

Documentation

Record-based pathway	Counsel may verify	Bates
Record indicates gap: Missing bills / charge detail; counsel may wish to verify supporting production	Affects economic damages completeness	—
Record indicates gap: Missing hospitalization itemization; counsel may wish to verify supporting production	Affects hospital economic damages	—

Care

Record-based pathway	Counsel may verify	Bates
Record indicates gap: Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purpose: NO-SHOW / MISSED APPOINTMENT (care-; counsel may wish to verify supporting production	Missed or delayed care may affect mitigation completion narrative	BATES-000003
Record indicates gap: Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed appointment + re; counsel may wish to verify supporting production	Missed or delayed care may affect mitigation completion narrative	BATES-000013
Record indicates gap: Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after p; counsel may wish to verify supporting production	Missed or delayed care may affect mitigation completion narrative	BATES-000018

Imaging

Record-based pathway	Counsel may verify	Bates
Record indicates gap: Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Purpose: MRI review; delayed neurology for; counsel may wish to verify supporting production	Missed or delayed care may affect mitigation completion narrative	BATES-000012

Record-based verification prompts only — not projections or opinions

Risk Flags

Premium

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PREMIUM

Record-based risk flags from chronology — missed care, delays, pharmacy patterns.

How to read this table: Record-based flags from chronology language. Severity icons: ● High, ● Moderate, ● Low. Verify Bates production before citing in briefs or expert outlines

Flag	Severity	Domain	Recommended follow-up	Detail	Bates
Missed appointment	● High	Medical follow-up	Verify chronology entry and Bates production for missed appointment	Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purpose: NO-SHOW / MISSED APPOINTMENT (care-gap) Riverside...	BATES-000003
Pharmacy utilization pattern	● Moderate	Pharmacy	Verify chronology entry and Bates production for pharmacy utilization pattern	Pharmacy Fill Record — ENCOUNTER 06 — Pharmacy Fill Record Date: 01/20/2024 Purpose: CVS initial opioid + NSAID (days supply for...	BATES-000006
Pharmacy utilization pattern	● Moderate	Pharmacy	Verify chronology entry and Bates production for pharmacy utilization pattern	Pharmacy Fill Record — ENCOUNTER 11 — Pharmacy Fill Record Date: 02/14/2024 Purpose: Walgreens early opioid refill + pharmacy hopping...	BATES-000011
Delayed care	● Moderate	Medical follow-up	Verify chronology entry and Bates production for delayed care	Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Purpose: MRI review; delayed neurology for hand tingling...	BATES-000012

Flag	Severity	Domain	Recommended follow-up	Detail	Bates
Missed appointment	● High	Medical follow-up	Verify chronology entry and Bates production for missed appointment	Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed appointment + regression language...	BATES-000013
Pharmacy utilization pattern	● Moderate	Pharmacy	Verify chronology entry and Bates production for pharmacy utilization pattern	Pharmacy Fill Record — ENCOUNTER 15 — Pharmacy Fill Record Date: 03/02/2024 Purpose: CVS refill; multi-pharmacy pattern continues...	BATES-000015
Delayed care	● Moderate	Medical follow-up	Verify chronology entry and Bates production for delayed care	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after paresthesias) Metro...	BATES-000018

Domain Gaps

Premium

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PREMIUM

Domain inventory with documented/missing/pending flags and Bates references.

Domain	Status	Documented count	Verification steps	Bates
Medical follow-up	documented	4	Confirm follow-up notes and specialist referrals in production	BATES-000004; BATES-000009; BATES-000010; BATES-000012; BATES-000013; BATES-000017
Functional	documented	6	Verify PT notes, ROM/strength testing, and plateau language	BATES-000004; BATES-000009; BATES-000010; BATES-000013; BATES-000018; BATES-000023
Work capacity	documented	3	Verify RTW notes, FCE reports, and employer correspondence	BATES-000007; BATES-000023; BATES-000024
Pharmacy	documented	11	Verify pharmacy ledgers, PBM statements, and prescriber notes	BATES-000002; BATES-000004; BATES-000006; BATES-000007; BATES-000011; BATES-000012
ADL (documented)	missing	0	Verify ADL/self-care language in nursing and therapy notes	Not found in the extracted chronology
Psychosocial (documented)	missing	0	Verify counseling, mental-health, and psychosocial screening notes	Not found in the extracted chronology
Pending verification	partial	6	Reconcile declared/implied gaps against complete medical production	BATES-000003; BATES-000012; BATES-000013; BATES-000018

Completion Matrix

Premium

ready

PREMIUM

Weighted completion 85% reflects domain documentation density (Medical, Functional, Work, Pharmacy, plus indexed ADL/psych/verification domains) — independent from compliance score

How to read this table: Each domain receives a weighted score based on documented vs missing inventory rows. Independent from compliance score; low completion may reflect extraction gaps, not patient behavior

Domain	Status	Weight	Score	Bates
Medical follow-up	documented	25	25	BATES-000004; BATES-000009; BATES-000010; BATES-000012; BATES-000013; BATES-000017
Functional	documented	20	20	BATES-000004; BATES-000009; BATES-000010; BATES-000013; BATES-000018; BATES-000023
Work capacity	documented	20	20	BATES-000007; BATES-000023; BATES-000024
Pharmacy	documented	15	15	BATES-000002; BATES-000004; BATES-000006; BATES-000007; BATES-000011; BATES-000012
ADL (documented)	missing	5	0	—
Psychosocial (documented)	missing	5	0	—
Pending verification	partial	10	5	BATES-000003; BATES-000012; BATES-000013; BATES-000018

Premium Narrative

Premium

ready

PREMIUM

Forward-looking verification should prioritize: Record indicates gap: Missing bills / charge detail; counsel may wish to verify supporting production. Declared and implied gaps in Standard tier warrant production follow-up before expert or settlement framing. Premium domain inventory and completion matrix identify documentation density — not patient compliance conclusions. Treatment arc spans index injury (01/08/2024) through latest indexed encounter. Counsel should reconcile RTW, MMI, and pharmacy ledgers against complete production

Strategy hooks

- Verify Bates production for each indexed mitigation row
- Reconcile declared vs implied gaps against complete medical records
- Review high-severity gaps before expert deposition outlines

Counsel Risk Exposure

Premium

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PREMIUM

Factual mapping of indexed record language to litigation-relevant exposure categories.

Exposure	Severity	Record fact	Litigation relevance	DOS	Bates
Missed appointment	● High	Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purpose: NO-SHOW / MISSED APPOINTMENT...	Missed-care language may be cited in mitigation or compliance framing	01/12/2024	BATES-000003
Delayed imaging/care	● Moderate	Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Purpose: MRI review; delayed neurology...	Delay language may support incomplete-mitigation or causation timing arguments	02/18/2024	BATES-000012

Exposure	Severity	Record fact	Litigation relevance	DOS	Bates
Missed appointment	● High	Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 Purpose: Missed appointment +...	Missed-care language may be cited in mitigation or compliance framing	02/22/2024	BATES-000013
Delayed imaging/care	● Moderate	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose: Delayed neuro consult (~7 weeks after...	Delay language may support incomplete-mitigation or causation timing arguments	03/11/2024	BATES-000018
Multi-pharmacy pattern	● Moderate	Multi-pharmacy utilization language indexed in chronology	Pharmacy pattern may be referenced in adherence or utilization disputes	—	—
Missing bills/receipts	● Moderate	Declared or implied documentation gaps include billing/pharmacy receipt language	Incomplete production may affect damages or mitigation verification	—	—

Counsel Checklist

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- Confirm Bates production for each mitigation action row
- Reconcile declared vs implied mitigation gaps against complete medical production
- Verify RTW restrictions chronology against employer / HR records
- Request pharmacy ledgers if refill or multi-pharmacy signals are present

- Cross-check medication-class inventory against pharmacy receipts and PBM statements
- Verify: Affects economic damages completeness
- Verify: Affects hospital economic damages
- Verify: Missed or delayed care may affect mitigation completion narrative
- Address gap: Affects economic damages completeness
- Address gap: Affects hospital economic damages

Top 5 Counsel Priorities

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Highest-priority verification tasks from gaps, risk flags, and compliance signals.

1. Missing bills / charge detail
2. Missing hospitalization itemization
3. Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 | Purpose: NO-SHOW / MISSED APPOINTMENT (care-gap) Riverside...
4. Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22/2024 | Purpose: Missed appointment + regression language...
5. Missed appointment

Glossary

Term	Definition
Mitigation	Documented actions taken to reduce harm, improve function, or comply with treatment recommendations
Functional limitation	Objective or reported restriction in ROM, strength, ADL, or endurance language
Plateau	Record language indicating functional or pain status has stabilized without further improvement
MMI	Maximum Medical Improvement — treating-provider language that further recovery is unlikely
RTW	Return to work — documented work status, restrictions, or employer communication
Pharmacy pattern	Fill, refill, multi-pharmacy, or adherence language extracted from chronology

Mitigation Storyline

Index injury documented at 01/08/2024. Chronology spans 12/15/2023 to 04/10/2024. 8 mitigation action(s) and 6 gap(s) indexed. Compliance score 52/100 based on record language. MMI milestone: 04/10/2024. Functional, pain, work, and pharmacy sections provide source-linked detail

Counsel Interpretation Hooks

- 4 high-severity gap(s) may warrant discovery follow-up
- Compliance score below 70 — review missed/delayed care language
- No early orthopedic consult language in initial chronology segment
- Opioid language without indexed pharmacy counseling / adherence notes
- Cross-check declared vs implied gaps against complete medical production

MMI Narrative Clarification

Status: —

MMI language indexed at 04/10/2024. Excerpt: Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 | Purpose: MMI reached; retu

- Request treating-provider MMI / P&S notes
- Reconcile MMI date with work restrictions and functional plateau language

How to Cite This Report

RITA Life Care / Mitigation Report v2.0.0 (generated 2026-08-02T 18:01:16+00:00) for Name, Case ID test-case-5-6143587d 0932 ce 510d 808 ba 396 be 34 fb. Record-based mitigation inventory — cite Bates references from indexed tables; not a medical opinion or life-care cost projection

QUALITY ASSURANCE: VERIFIED

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