

Pre-Existing Condition / Comorbidity

Case: test-case-5-6143587d0932ce510d808ba396be34fb · Generated: 2026-08-02T 17:42:11+00:00 · Events: 22

Standard — baseline intelligence

Clean, structured, reliable, and tied to the record. No interpretation, no medical opinions, no causation analysis.

Conditions listed: 2

Declared gaps: 5

PHI-scrubbed twin: Included

Comorbidity burden: Baseline comorbidity burden: low (2 chronic conditions)

Counsel orientation summary

Baseline conditions: Hyperlipidemia / statin-treated; Chronic low back pain (lumbar strain)

Baseline functional status: Chronic lumbar limitations; no shoulder limitations pre-index

Baseline pain: Pre-index pain limited to lumbar region; post-index pain scores escalate in shoulder trajectory with documented regression episodes

Record-based orientation summary for counsel — not a medical or legal conclusion

Case Header / Scope of Review

Patient, facilities, and providers are shown in Tier 1 — Core Foundation on the left.

Encounter dates: 12/15/2023 → 04/10/2024

Records reviewed: 22

Scope: Deterministic pre-existing condition / comorbidity inventory for case test-case-5-6143587d 0932 ce 510d 808 ba 396 be 34 fb from chronology events. Not a legal or medical opinion

What this report does not opine on: This report does not opine on negligence, breach of the standard of care, legal causation, impairment rating, or apportionment percentages. It presents a deterministic, source-linked inventory of pre-existing / comorbid conditions and neutral plausibility signals for counsel and any retained medical expert to evaluate — not an expert medical or legal opinion

1. Condition List (Source-Linked)

Source-linked condition inventory only — no medical interpretation, severity scoring, or causation language

Condition	Class	First documented	Source
Hyperlipidemia / statin-treated	metabolic	01/08/2024	BATES-000002
Chronic low back pain (lumbar strain)	prior injury	12/15/2023	BATES-000001

Condition classification layer

Conditions grouped for screening only. Acute findings, differentials, impressions, and OCR noise are excluded from baseline inventory

prior injury

Condition	First documented	Source
Chronic low back pain (lumbar strain)	12/15/2023	BATES-000001

metabolic

Condition	First documented	Source
Hyperlipidemia / statin-treated	01/08/2024	BATES-000002

2. Comorbidity Summary (Structured)

Structured inventory — source-linked baseline comorbidity only. Acute findings, differentials, and treatment notes excluded.

Chronic conditions

When	Finding	Source
01/08/2024	Hyperlipidemia / statin-treated	BATES-000002
12/15/2023	Chronic low back pain (lumbar strain)	BATES-000001

Relevant past injuries

When	Finding	Source
12/15/2023	Chronic low back pain (lumbar strain)	BATES-000001

Behavioral health flags

None flagged.

Medication history

Chronic / home medications

Chronic medication	First documented	Source
Lisinopril (chronic)	01/08/2024	BATES-000002
Atorvastatin (chronic)	01/08/2024	BATES-000002
Ibuprofen	01/08/2024	BATES-000002
Hydrocodone (acute/pain)	01/24/2024	BATES-000007
Ketorolac/Toradol (acute)	03/01/2024	BATES-000014

Acute / incident-period medications

Acute medication	First documented	Source
Ketorolac/Toradol (acute)	01/19/2024	BATES-000004
Hydrocodone (acute/pain)	01/20/2024	BATES-000006
Ibuprofen	01/20/2024	BATES-000006

Acute medication	First documented	Source
Cyclobenzaprine	02/14/2024	BATES-000011
Gabapentin	03/20/2024	BATES-000021

Polypharmacy patterns:

- Multiple concurrent medications documented (10 unique entries)
- Opioid / acute pain medication use documented in chronology

Baseline functional status summary

Baseline functional documentation identified across Ortho baseline, PCP baseline, PT baseline

Finding	Encounter dates	Source
Ortho baseline (multiple encounters)	01/24/2024; 02/08/2024; 02/18/2024	BATES-000007
PT baseline	02/08/2024	BATES-000009
PCP baseline	12/15/2023	BATES-000001

Baseline pain pattern summary

Pre-index pain limited to lumbar region; post-index pain scores escalate in shoulder trajectory with documented regression episodes

Pre-index pain documentation: 1 row(s); post-index pain documentation: 12 row(s). Documented pain scores include: 4, 5, 7, 8/10

Pattern	When	Source
Pain score 8/10 documented	02/08/2024	BATES-000009
Pain score 5/10 documented	02/12/2024	BATES-000010
Pain score 7/10 documented	02/22/2024	BATES-000013
Pain score 4/10 documented	04/05/2024	BATES-000023
Chronic / baseline pain language documented	12/15/2023	BATES-000001

Baseline ADL / work capacity

Baseline ADL signals show chronic lumbar limitations pre-index and progressive shoulder-related ADL limitations post-index

5 ADL / work-capacity data point(s) documented (0 pre-index; 5 post-index)

Finding	When	Source
EMERGENCY Department Visit — ENCOUNTER 04 — EMERGENCY Department Visit Date: 01/19/2024 Purpose: E	01/19/2024	BATES-000004
Orthopedic Clinic — ENCOUNTER 07 — Orthopedic Clinic Date: 01/24/2024 Purpose: Ortho eval; MRI + P	01/24/2024	BATES-000007
Physical Therapy Evaluation — ENCOUNTER 09 — Physical Therapy Evaluation Date: 02/08/2024 Purpose	02/08/2024	BATES-000009
Physical Therapy Progress — Plateau / MMI path — ENCOUNTER 23 — Physical Therapy Progress — Plateau	04/05/2024	BATES-000023

Finding	When	Source
Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 Purpos	04/10/2024	BATES-000024

Baseline summaries are record-based inventories for causation / damages framing — not medical opinions

Surgical history

None flagged.

3. Timeline of Pre-Existing Conditions

Collapsed pre-existing condition evolution only — acute injury and treatment events removed.

Condition	First appearance	Last documented	Status	Recurrence	Treatment gap	Source
Hyperlipidemia / statin-treated	01/08/2024	01/08/2024	first documented	—	—	BATES-000002
Chronic low back pain (lumbar strain)	12/15/2023	12/15/2023	first documented	—	—	BATES-000001

4. Risk-Relevant Categories

Risk-relevant grouping for screening only — not a clinical risk score

No categorized pre-existing findings flagged.

5. Declared Gaps

Declared gaps only — RITA does not invent missing facts. Use for discovery and record completeness review

ID	Type	Label	Detail	Severity	Action
MDG-FACILITIES	missing_data	Missing facility resolution across encounters	No facilities could be resolved from chronology events	high	Request complete facility list and admission/discharge summaries
MDG-PROVIDERS	missing_data	Missing treating provider resolution	No treating providers could be resolved from chronology events	high	Obtain signed notes or attestations from treating providers
MDG-DOS	missing_data	Missing date on encounter	6 chronology event(s) have blank or missing dates of service	medium	Obtain corrected DOS pages or certified chronology for blank-date encounters
MDG-IMAGING	record_gap	Missing prior imaging	No prior / baseline imaging comparison available in chronology	high	Obtain prior MRI/XR/CT for chronic vs acute comparison
MDG-IMAGING-CMP	record_gap	Missing imaging comparison	Side-by-side acute vs chronic imaging comparison not present on available record	medium	Request side-by-side acute vs baseline imaging comparison from radiology

6. PHI-Scrubbed Twin

PHI-scrubbed twin is automatically included for LLM workflows. Use the scrubbed package with third-party models; use the identified Case File only under BAA-covered tools

Package: RITA_Case File_test-case-5-6143587d 0932 ce 510d 808 ba 396 be 34 fb scrubbed

Status: ready

Scrubbed fields: patient name; date of birth; mrn; address; phone; email; account identifiers

Retained for traceability: internal event ids; bates or source references; encounter dates; condition labels

Scrub pass reduces direct identifiers; counsel remains responsible for HIPAA compliance and vendor BAAs

7. Document Index

Date	Encounter	Facility	Source
01/08/2024	Urgent Care Visit — ENCOUNTER 02 — Urgent Care Visit Date: 01/08/2024 Purpose	Quick Care Urgent Clinic	BATES-000002
01/12/2024	Primary Care Office — ENCOUNTER 03 — Primary Care Office Date: 01/12/2024 Purp	Riverside Family Medicine	BATES-000003
01/19/2024	EMERGENCY Department Visit — ENCOUNTER 04 — EMERGENCY Department Visit Date: 01/	Metro General Hospital	BATES-000004
01/19/2024	Radiology / Imaging Report — ENCOUNTER 05 — Radiology / Imaging Report Date: 01/	Metro General Imaging	BATES-000005
01/20/2024	Pharmacy Fill Record — ENCOUNTER 06 — Pharmacy Fill Record Date: 01/20/2024 Pu		BATES-000006
01/24/2024	Orthopedic Clinic — ENCOUNTER 07 — Orthopedic Clinic Date: 01/24/2024 Purpose	Harlan Shoulder Clinic	BATES-000007
02/05/2024	MRI Imaging — ENCOUNTER 08 — MRI Imaging Date: 02/05/2024 Purpose: Delayed MRI	Mountain View Imaging Center	BATES-000008
02/08/2024	Physical Therapy Evaluation — ENCOUNTER 09 — Physical Therapy Evaluation Date: 0	Peak Motion Physical Therapy	BATES-000009
02/12/2024	Physical Therapy Progress — ENCOUNTER 10 — Physical Therapy Progress Date: 02/12		BATES-000010
02/14/2024	Pharmacy Fill Record — ENCOUNTER 11 — Pharmacy Fill Record Date: 02/14/2024 Pu		BATES-000011
02/18/2024	Orthopedic Follow-up — ENCOUNTER 12 — Orthopedic Follow-up Date: 02/18/2024 Pu		BATES-000012
02/22/2024	Physical Therapy Progress — ENCOUNTER 13 — Physical Therapy Progress Date: 02/22		BATES-000013
03/01/2024	Urgent Care Visit — ENCOUNTER 14 — Urgent Care Visit Date: 03/01/2024 Purpose	Quick Care Urgent Clinic	BATES-000014
03/02/2024	Pharmacy Fill Record — ENCOUNTER 15 — Pharmacy Fill Record Date: 03/02/2024 Pu		BATES-000015
03/05/2024	Hospital Admission — Inpatient — [Name]	Metro General Hospital	BATES-000017

Date	Encounter	Facility	Source
03/11/2024	Neurology Consult — ENCOUNTER 18 — Neurology Consult Date: 03/11/2024 Purpose	Metro Neuro Associates	BATES-000018
03/15/2024	EMG / Nerve Study — ENCOUNTER 19 — EMG / Nerve Study Date: 03/15/2024 Purpose		BATES-000019
03/18/2024	MRI Hip (Out-of-Order Date Stress) — ENCOUNTER 20 — MRI Hip (Out-of-Order Date S	Mountain View Imaging Center	BATES-000020
03/20/2024	Pharmacy Fill Record — ENCOUNTER 21 — Pharmacy Fill Record Date: 03/20/2024 Pu		BATES-000021
04/05/2024	Physical Therapy Progress — Plateau / MMI path — ENCOUNTER 23 — Physical Therapy		BATES-000023
04/10/2024	Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date		BATES-000024
12/15/2023	Primary Care — Pre-Existing — ENCOUNTER 01 — Primary Care — Pre-Existing Date: 1	Riverside Family Medicine	BATES-000001

Apportionment Analysis

requires expert clinical correlation

PREMIUM

Baseline factors surfaced:

- Hyperlipidemia / statin-treated
- Chronic low back pain (lumbar strain)

Requires Expert Clinical Correlation: factors that may relate to baseline vs new injury are listed for counsel — percentage apportionment is not computed by this tool

High-risk elevated module. Do not use as an expert apportionment opinion

Pre-Existing vs Incident Symptom Overlap

requires expert clinical correlation

PREMIUM

- Was a pre-existing condition aggravated by the presenting injury?
- Was progression accelerated beyond expected natural history?
- Was worsening within expected natural progression of disease?

Index injury date reference: 01/08/2024

Symptom	Pre-existing	Post-incident	Mixed	Source
Shoulder pain	—	yes	—	BATES-000004
Low back pain	yes	—	—	BATES-000001
Hand tingling / paresthesias	—	yes	—	BATES-000004
Hypertension / elevated BP	—	yes	—	BATES-000002
Hip pain	—	yes	—	BATES-000002

Requires Expert Clinical Correlation: aggravation vs natural progression requires treating or retained expert review

Comorbidity Interaction Map

requires expert clinical correlation

PREMIUM

Rule-in candidates: Hyperlipidemia / statin-treated; Chronic low back pain (lumbar strain)

Alternative explanations: Natural progression of degenerative / chronic disease without acute aggravation; Acute traumatic injury independent of baseline comorbidity; Mixed picture requiring expert apportionment (not determined here)

Condition	Domain	Record-based pattern	Source
Hyperlipidemia	Metabolic baseline / healing trajectory	Statin-treated hyperlipidemia documented — may affect metabolic baseline and healing trajectory (expert correlation required)	Chronology agg regate
Low back pain	Functional baseline	Chronic lumbar symptoms may affect ADL and work capacity baseline	Chronology agg regate

Requires Expert Clinical Correlation: competing-cause framing without probability percentages

Pre-Existing Imaging Comparison

insufficient evidence

PREMIUM

None flagged.

Insufficient Clinical Evidence to Differentiate: no prior imaging findings were available in the chronology

Medication / Polypharmacy + Litigation Flags

requires expert clinical correlation

PREMIUM

Chronic / home medications

Chronic medication	First documented	Source
Lisinopril (chronic)	01/08/2024	BATES-000002
Atorvastatin (chronic)	01/08/2024	BATES-000002
Ibuprofen	01/08/2024	BATES-000002
Hydrocodone (acute/pain)	01/24/2024	BATES-000007
Ketorolac/Toradol (acute)	03/01/2024	BATES-000014

Acute / incident-period medications

Acute medication	First documented	Source
Ketorolac/Toradol (acute)	01/19/2024	BATES-000004
Hydrocodone (acute/pain)	01/20/2024	BATES-000006
Ibuprofen	01/20/2024	BATES-000006
Cyclobenzaprine	02/14/2024	BATES-000011
Gabapentin	03/20/2024	BATES-000021

Polypharmacy patterns:

- Multiple concurrent medications documented (10 unique entries)
- Opioid / acute pain medication use documented in chronology

Litigation-relevant flags

Flag	Detail	Source
Prior similar injuries / chronic pain	Chronic low back pain or prior injury language documented pre-index	Chronology agg regate
Pharmacy hopping / early refill pattern	Multi-pharmacy or early refill language documented	Chronology agg regate
Delayed care / missed appointment	Missed appointment or delayed follow-up language documented	Chronology agg regate
Chronic opioid / pain medication exposure	Opioid or repeated acute pain medication entries documented	Chronology agg regate

Requires Expert Clinical Correlation: medication effects on healing / pain / deterioration are not determined by this deterministic screen

Functional Capacity / Counsel-Directed Prompts

ready

PREMIUM

Baseline functional status

Finding	When	Source
EMERGENCY Department Visit — ENCOUNTER 04 — EMERGENCY Department Visit Date: 01/19/2024 Purpose: ED: MOI contradiction	01/19/2024	BATES-000004
Physical Therapy Evaluation — ENCOUNTER 09 — Physical Therapy Evaluation Date: 02/08/2024 Purpose: PT eval + multi-ses	02/08/2024	BATES-000009
Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 Purpose: MMI reached; retu	04/10/2024	BATES-000024

Counsel-directed questions (BYO-LLM)

- Which symptoms were documented before the index date (01/08/2024) versus after?
- Compare baseline mobility and ADL language to post-incident functional documentation
- Summarize pre-existing pain patterns versus post-incident pain trajectory in PT and clinic notes
- Identify comorbidities that may affect recovery trajectory based on the chronology only
- List medications present before index injury versus medications added after the incident
- Identify declared record gaps that should be addressed before causation or damages strategy
- Contrast prior injury history with the index incident mechanism and body region

Limitation	When	Source
EMERGENCY Department Visit — ENCOUNTER 04 — EMERGENCY Department Visit Date: 01/19/2024 Purpose: ED: MOI contradiction	01/19/2024	BATES-000004
Physical Therapy Evaluation — ENCOUNTER 09 — Physical Therapy Evaluation Date: 02/08/2024 Purpose: PT eval + multi-ses	02/08/2024	BATES-000009

Limitation	When	Source
Orthopedic MMI / RTW Summary — ENCOUNTER 24 — Orthopedic MMI / RTW Summary Date: 04/10/2024 Purpose: MMI reached; retu	04/10/2024	BATES-000024

Prior functional limitation language identified — pre- vs post-injury comparison for WC/PI still requires vocational / medical expert input

Prognostic Impact Module

requires expert clinical correlation

PREMIUM

Comorbidity band: **low** (score 0)

Score derived from chronic condition count, medication complexity, and functional baseline signals

- Recovery trajectory may be prolonged with higher comorbidity burden
- MMI timing may be delayed pending comorbid optimization
- Future medical needs may include comorbidity-related care (expert determination)

Requires Expert Clinical Correlation: prognosis / MMI / future care are not determined by this tool

Litigation-Ready Comorbidity Packet

shell

PREMIUM

Chronic conditions: 2

Comorbidity score: 0 (low)

Active signals: 0

Prior imaging rows: 0

Packet inventory for counsel — exhibits should be cross-checked against Bates-stamped records before production

QUALITY ASSURANCE: VERIFIED