



NAVICASE

MEDICAL RECORD REVIEW

SAMPLE REPORT. Prepared to show the format and depth of a NaviCase deliverable. The patient, providers, facilities, records, and events described here are entirely fictitious. Any resemblance to actual persons or events is coincidental.

June 3, 2026

RE: Daniel R. Marsh
DOB: 09/14/1968
Case Reference: NC-2026-104
Date of Incident: 03/06/2025

At your request, I have performed a review of the medical records furnished in this matter. This document summarizes those records. It contains no medical opinions and no conclusions. If additional records become available, this summary may be supplemented. 742 pages of records were submitted for review.

RECORDS REVIEWED

1. Westhaven Police Department Traffic Crash Report, dated 03/06/2025.
2. Bayline Regional Medical Center emergency department records, dated 03/06/2025, with itemized statement.
3. Elaine T. Marquez, M.D., family medicine records, dated 01/22/2019 through 03/28/2026, including outside imaging reports.
4. Lakeside Orthopedic Urgent Care record, dated 06/03/2021.
5. Coral Point Imaging reports and ledgers, dated 06/11/2021, 05/13/2025, and 07/30/2025.
6. Atlantic Spine & Joint Institute (Steven J. Callahan, M.D.) records, intake forms, and ledgers, dated 04/29/2025 through 03/12/2026.
7. Harbor Physical Therapy records, attendance logs, and statements, dated 05/06/2025 through 08/14/2025.
8. Summit Pain Associates (Priya Raman, D.O.) records and ledger, dated 09/18/2025 through 11/06/2025.
9. Sentinel Casualty Insurance personal injury protection loss history, dated 12/02/2025.
10. Plaintiff's Answers to Interrogatories, sworn 01/14/2026 and served 01/16/2026.
11. Plaintiff's Responses to Request for Admissions, served 01/16/2026.
12. Defendant's Initial Disclosures, dated 11/20/2025, with vehicle repair estimate and vehicle photographs.

RECORD REVIEW

PRE-INCIDENT

This document reports the contents of the medical records reviewed. It does not constitute medical or legal advice or an expert medical opinion, and no physician-patient relationship is created. Interpretation of this document and its use in any matter remain the responsibility of the retaining professional and their retained experts.

01/22/2019: Mr. Marsh established care with Elaine T. Marquez, M.D., for a physical. He denied back pain, joint pain, and muscle weakness on the review of systems. Hypertension and hyperlipidemia were assessed, and lisinopril and atorvastatin were continued. Weight was 212 pounds.

03/15/2020: He returned to Dr. Marquez for an annual physical. The review of systems again denied musculoskeletal complaints. The examination recorded a normal gait and full range of motion in all extremities.

06/03/2021: Mr. Marsh presented to Lakeside Orthopedic Urgent Care with three days of low back pain that began while unloading bags of mulch. The examination recorded lumbar paraspinal tenderness without radicular signs. The diagnosis was lumbar strain. A Medrol dose pack and cyclobenzaprine were prescribed, and lumbar radiographs were ordered.

06/11/2021: Lumbar spine radiographs were obtained at Coral Point Imaging on the urgent care referral. The report is reproduced in the Imaging section below.

07/08/2021: At follow-up with Dr. Marquez, the back pain was recorded as resolved. He declined physical therapy. No further back complaints appear in the Marquez chart after this visit.

02/10/2024: Dr. Marquez performed a physical. The review of systems denied back pain and joint pain. Weight was 219 pounds. The assessment covered hypertension, hyperlipidemia, and mild obesity.

01/17/2025: Mr. Marsh saw Dr. Marquez for an annual physical seven weeks before the incident. He voiced no musculoskeletal complaints. The examination was unremarkable, and medications were refilled.

POST-INCIDENT

03/06/2025: The Westhaven Police Department crash report records a 2:47 PM two-vehicle collision in which Mr. Marsh's sedan was struck from behind while stopped at a traffic signal. The report lists his injury severity as "C" (possible injury), records that he was not transported, and notes that both vehicles were driven from the scene. The repair estimate in the defense disclosures describes rear bumper and trunk lid damage.

03/06/2025: Mr. Marsh presented to the Bayline Regional Medical Center emergency department at 7:38 PM the same evening with low back pain. Triage and provider notes record right-sided low back pain rated 8/10, without numbness or weakness. The examination recorded right lumbar paraspinal tenderness, negative straight leg raise bilaterally, 5/5 strength, and intact sensation and reflexes. Lumbar radiographs were obtained and showed no acute fracture, with

degenerative changes at L4-L5. The visit diagnosis was acute right-sided low back strain. He was discharged with ibuprofen and cyclobenzaprine and instructed to follow up with his primary care physician in three to five days.

04/29/2025: Mr. Marsh was evaluated at Atlantic Spine & Joint Institute by Steven J. Callahan, M.D. The history records constant low back pain since the accident, rated 8/10, radiating into the left leg. The intake form answers "No" to prior injury or treatment of the low back. The examination recorded lumbar tenderness, painful and decreased lumbar range of motion, negative straight leg raise bilaterally, 5/5 strength, and intact reflexes. Dr. Callahan ordered a lumbar MRI and referred him to physical therapy. This is the first clinical encounter documented after the emergency department visit of 03/06/2025.

05/06/2025: An initial physical therapy evaluation was performed at Harbor Physical Therapy. Pain was rated 8/10. A plan of three visits per week for twelve weeks was established. The attendance log documents 24 completed visits of 36 scheduled through 08/14/2025, with no visits between 07/03/2025 and 07/21/2025.

05/13/2025: An MRI of the lumbar spine was performed at Coral Point Imaging on Dr. Callahan's order. The report is reproduced in the Imaging section below.

06/17/2025: At follow-up, Dr. Callahan reviewed the MRI and recommended a left L4-L5 transforaminal epidural steroid injection. The narrative records pain "now 9/10 at its worst." The patient-completed intake form for the same visit circles 5/10 for current pain.

07/22/2025: At the next Callahan visit, Mr. Marsh reported left shoulder pain "since the accident." This is the first mention of a shoulder complaint in any furnished record. A left shoulder MRI was ordered.

07/30/2025: An MRI of the left shoulder was performed at Coral Point Imaging. The report is reproduced in the Imaging section below.

08/14/2025: The Harbor Physical Therapy discharge summary records pain improved to 4/10, with goals "partially met." The checkbox section of the same document marks "all goals met at discharge."

09/18/2025: Mr. Marsh was evaluated by Priya Raman, D.O., at Summit Pain Associates on Dr. Callahan's referral. The examination recorded lumbar tenderness and painful extension, with a normal neurologic examination. The plan was a left L4-L5 transforaminal epidural steroid injection.

10/02/2025: Dr. Raman performed the left L4-L5 transforaminal epidural steroid injection at the Summit Pain Associates office suite.

10/23/2025: At follow-up, Mr. Marsh reported approximately 60 percent relief lasting two weeks. A second injection was scheduled.

11/06/2025: Dr. Raman performed a second left L4-L5 transforaminal epidural steroid injection.

03/12/2026: At re-evaluation, Dr. Callahan recorded intermittent low back pain rated 4/10, a plateau with conservative care, and a plan of as-needed follow-up. The ledger for this and all prior Atlantic Spine & Joint Institute visits carries the account balance under a letter of protection.

03/28/2026: Mr. Marsh saw Dr. Marquez for medication refills. The note records no musculoskeletal complaints and makes no reference to the accident, the back pain, or the treatment described above. This is the only Marquez encounter documented after 01/17/2025.

IMAGING

06/11/2021: Lumbar spine radiographs, three views, were obtained at Coral Point Imaging and interpreted by Marc Delgado, M.D.

Findings: Vertebral body heights and alignment are maintained. There is mild disc space narrowing at L4-L5 with anterior endplate osteophytes. Facet arthropathy is present at L4-L5 and L5-S1. No acute fracture or spondylolisthesis.

Impression: 1. Mild degenerative disc disease at L4-L5. 2. Lower lumbar facet arthropathy. 3. No acute osseous abnormality.

05/13/2025: An MRI of the lumbar spine without contrast was performed at Coral Point Imaging and interpreted by Marc Delgado, M.D.

Findings: Lumbar lordosis is maintained. There is no acute fracture or marrow edema. L3-L4: Mild disc desiccation without significant bulge. L4-L5: Disc desiccation with a 3 mm broad-based posterior disc bulge, bilateral facet arthropathy, and mild bilateral foraminal narrowing without nerve root compression. L5-S1: Facet arthropathy without significant disc abnormality. The conus is normal in position and signal.

Impression: 1. Multilevel degenerative changes, most pronounced at L4-L5, with a 3 mm broad-based disc bulge and facet arthropathy. 2. No disc herniation, central canal stenosis, or nerve root compression. 3. No acute finding.

07/30/2025: An MRI of the left shoulder without contrast was performed at Coral Point Imaging and interpreted by Marc Delgado, M.D.

Findings: There is supraspinatus tendinosis with a small partial articular-sided tear at the footprint, without retraction. The remaining cuff is intact. There is acromioclavicular joint arthrosis with inferior osteophyte formation. No fracture, dislocation, or acute marrow edema. The labrum is grossly intact on this non-arthrographic study.

Impression: 1. Supraspinatus tendinosis with small partial articular-sided tear. 2. Acromioclavicular joint arthrosis. 3. No acute osseous abnormality.

DISCOVERY

In his sworn Answers to Interrogatories, signed 01/14/2026, Mr. Marsh stated that he had no injuries or treatment to his low back before the accident, and described his pain as constant and daily since the incident. He listed Dr. Callahan, Harbor Physical Therapy, and Summit Pain Associates as his treating providers for the claimed injuries.

In his Responses to Request for Admissions, served 01/16/2026, Mr. Marsh denied that before the accident he received treatment to any of the same parts of the body for which he has sought treatment related to this accident.

This concludes the summary of the records furnished for review. Please do not hesitate to contact me with any questions or concerns.