



Summary

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Table of Contents

DISCLAIMER & AGREEMENT SUMMARY	1
PURPOSE AND SCOPE	1
PROTECTED HEALTH INFORMATION (PHI)	1
RECORD HANDLING AND RETENTION	1
TABLE OF CONTENTS	2
I. CHRONOLOGICAL MEDICAL HISTORY	4
2021	4
2022	5
2023	6
2024	7
2025	8
SUMMARY OF YEAR-BY-YEAR TRENDS	9
II. IMAGING & DIAGNOSTIC SUMMARY	10
A. RADIOLOGY AND IMAGING STUDIES	10
B. LABORATORY AND DIAGNOSTIC TESTS	10
C. PHYSICAL THERAPY & FUNCTIONAL TESTING	11
D. DIAGNOSTIC SUMMARY OVERVIEW	11
III. MEDICATION HISTORY (REFERENCE PACK)	12
A. CURRENT LONG-TERM MEDICATIONS (AS OF SEPTEMBER 2025)	12
B. PREVIOUS / TRIAL MEDICATIONS	12
C. MEDICATION EFFECT AND TOLERANCE SUMMARY	13
D. THERAPEUTIC NOTES	13

<u>IV. PROVIDER HISTORY (REFERENCE PACK)</u>	<u>14</u>
A. TREATING AND CONSULTING PROVIDERS	14
B. PROVIDER INTERACTION SUMMARY	16
<u>V. THANK YOU & NEXT STEPS</u>	<u>17</u>
A. THANK YOU	17
C. SUPPORT & CONTACT	18



I. Chronological Medical History

(January 2021 – September 2025)

2021

January – April 2021 – Pre-Injury Primary-Care Care

Routine follow-ups with Dr. L. Hart documented stable Type 2 diabetes (A1C 6.9 %) and blood pressure averaging 122/74 mmHg (41 – 46).

No musculoskeletal complaints noted; patient working full-time as a warehouse floor manager.

Medications included Metformin 1000 mg BID, Lisinopril 10 mg daily, and Hydrochlorothiazide 25 mg daily (48 – 52).

May 28, 2021 – Work-Related Slip-and-Fall Injury

Emergency-department evaluation at Metro General Hospital after fall on wet dock surface (112 – 119).

Imaging: lumbar X-rays → no fracture; mild degenerative narrowing L4-L5.

Diagnosis: acute lumbar strain and right-hip contusion.

Treatment: Naproxen 500 mg BID, Cyclobenzaprine 5 mg TID PRN, heat/ice, and two weeks of work restriction (120 – 128).

June – August 2021 – Persistent Lumbar Pain

Primary-care visits note ongoing right-sided lumbar pain with radiation to posterior thigh (150 – 164).

MRI 8/9/21: broad-based disc protrusion L5-S1 impinging S1 nerve root (177).

Initiated Gabapentin 300 mg TID (183) and physical therapy 2× per week for 6 weeks (194 – 215).

Therapy progress: pain 7/10 → 6/10; tolerance to standing 15 min max (204).

Employer unable to accommodate restrictions → medical leave (218).

September – December 2021 – Orthopedic Referral

Consult Dr. R. Patel (Ortho Spine) (231). Exam: positive right SLR, limited flexion 45°.

Plan: continue conservative management; consider epidural if no improvement.

Epidural steroid injection 10/12/21 → temporary 30 % relief (243 – 246).

Follow-up 12/1/21 → pain 7/10 recurrent (250).

2022

January – March 2022 – Pain-Management Integration

Referred Dr. J. Owens (262). Initial evaluation: chronic lumbosacral pain radiating to RLE; diagnosis = lumbar radiculopathy.

Procedures: Epidural L5-S1 2/10/22 → relief for 3 weeks (269).

Started Duloxetine 30 mg daily, titrated to 60 mg (275).

April – June 2022 – Hospitalization for Chest Pain

6/14/22 → ER visit for chest pressure and dyspnea (301).

Labs/troponin negative; EKG normal. Stress echo → no ischemia (312 – 319).

Assessment: musculoskeletal pain/anxiety (324).

PT consult in-hospital: guarded gait; limited trunk rotation; advised outpatient PT (332 – 338).

July – December 2022 – Continued Conservative Treatment

PT resumed 8/1 – 9/15 (347 – 365): focus core stability, mobility.

Reported 25 % improvement (361).

Primary-care 11/22 → persistent pain; unable return work (385).

FMLA extended; referral pain psychologist (392).

2023

January – March 2023 – Multidisciplinary Coordination

Endocrinology 1/10 → A1C 8.2 %, glucose variability attributed to inactivity (453).

Psychiatry 1/28 → moderate depressive symptoms; started Sertraline 50 mg daily (471).

Pain management 2/14 → 2nd epidural injection L5-S1 (482).

April – June 2023 – Functional Decline

Orthopedic follow-up 4/7 → MRI shows degenerative changes progressed L4-L5 (498 – 503).

FCE 5/10 → standing 10 min, walking 1 block, lifting ≤ 10 lbs (505 – 519).

CBT sessions weekly document improved coping, no suicidal ideation (523 – 541).

July – December 2023 – Stability With Persistent Limitations

Primary-care visits (550 – 585): BP 122/78, weight 195 lbs (BMI 33).

Pain scores 6–7/10 ; Duloxetine continued ; Gabapentin increased to 400 mg TID (567 – 575).

Reports walking short distances with breaks ; unable resume employment (580 – 585).

2024

January – March 2024 – Updated Imaging and Consultations

MRI 2/12/24 → worsening disc degeneration L4-L5 with facet arthropathy (603 – 610).

Orthopedic re-evaluation 2/26 → surgical option discussed; patient declines (617).

Pain management 3/12 → recommended aquatic therapy (620).

April – August 2024 – Rehabilitation Efforts

PT sessions 4/1 – 5/28 (628 – 642): aquatic therapy x 8 visits, modest gait improvement.

Psychiatry 5/10 → Sertraline ↑ to 100 mg ; reports improved sleep (649).

Primary-care 7/15 → BMI 36 ; fatigue persistent (681 – 688).

September – December 2024 – Pain Management Maintenance

Epidural 10/2/24 → short-term relief (704 – 708).

Pain clinic notes discuss spinal cord stimulator trial but patient declines (714 – 718).

Continues Gabapentin, Duloxetine, Metformin, Lisinopril (720 – 725).

2025

January – March 2025 – Ongoing Disability Evaluation

Functional assessments 1/12 → no significant improvement (733).

Primary-care 1/28 → stable vitals; pain 6/10 (742).

Endocrinology 2/20 → A1C 7.5 %; metabolic status improved slightly (748).

April – July 2025 – Orthopedic and Imaging Updates

Orthopedic consult 4/2 → diagnosis unchanged; muscle spasm persist (812).

MRI 7/8 → stable degenerative findings ; no acute herniation (835 – 840).

Referred for pain-management follow-up (847).

August – September 2025 – Current Functional Status

Reports daily pain 6–8/10 ; performs basic ADLs independently but cannot stand > 15 min or walk > 1 block without pain flare (852–860).

Psychiatry visit 9/5 → mood stable on Sertraline 100 mg (865).

Primary-care 9/22 → continues on current medications ; chronic pain stable (870 – 875).

Summary of Year-by-Year Trends

Year	Key Events	Functional Impact	Treatment Response
2021	Injury + initial therapy	From full duty → medical leave	Partial relief with PT/meds
2022	2 epidurals + hospitalization	Limited mobility, anxiety	Temporary improvement
2023	FCE confirmed restrictions	Ongoing disability	Modest pain reduction
2024	MRI progression, aquatic PT	No return to work	Maintained symptom control
2025	Stable degeneration	Chronic functional limitations	Ongoing maintenance

II. Imaging & Diagnostic Summary

(Records: January 2021 – September 2025)

A. Radiology and Imaging Studies

Date	Type of Study / Facility	Findings / Impression (Summarized)	Page Reference
05/28/2021	Lumbar Spine X-Ray – Metro General Hospital	Mild degenerative disc space narrowing at L4-L5; no acute fracture or dislocation.	(119)
08/09/2021	MRI Lumbar Spine – Radiology Associates	Broad-based disc protrusion at L5-S1 contacting right S1 nerve root; mild desiccation L4-L5.	(177)
02/10/2022	MRI Lumbar Spine – Recheck	Persistent L5-S1 protrusion with foraminal narrowing; no new herniation.	(243)
06/15/2022	Cardiac Stress Echo – Metro General Hospital	Normal LV function (EF 60%); negative for ischemia. Episode determined non-cardiac.	(312–319)
02/12/2024	MRI Lumbar Spine – Advanced Imaging Center	Worsening L4-L5 degenerative disc disease with facet arthropathy and early canal stenosis; stable L5-S1 changes.	(603–610)
07/08/2025	MRI Lumbar Spine – Updated Study	Stable degenerative findings at L4-L5 and L5-S1; no acute herniation or compression.	(835–840)
Various 2021-2025	X-rays – Knees, Hip (comparative)	Minimal degenerative osteoarthritic changes; no fracture.	(421, 512)

B. Laboratory and Diagnostic Tests

Date	Test / Panel	Results (Abbreviated)	Interpretation	Page Reference
01/15/2021	Comprehensive Metabolic Panel	Glucose 146 mg/dL, Creatinine 0.8 mg/dL	Mild hyperglycemia, otherwise normal renal/liver function.	(41)

Date	Test / Panel	Results (Abbreviated)	Interpretation	Page Reference
05/12/2021	Hemoglobin A1C	6.9 %	Good diabetic control prior to injury.	(55)
03/20/2022	Lipid Panel	Total Chol 188 mg/dL, LDL 102, HDL 48	Borderline LDL; lifestyle counseling.	(278)
06/14/2022	Cardiac Enzymes / Troponin	Negative ×2	No myocardial injury.	(312)
03/05/2023	Hemoglobin A1C	8.2 %	Sub-optimal control linked to inactivity.	(453)
02/20/2025	Hemoglobin A1C	7.5 %	Improved with medication adherence.	(748)
07/15/2024	CBC / CMP	Within normal limits except mild anemia (Hgb 11.5 g/dL).	Consistent with chronic illness; no acute pathology.	(681)

C. Physical Therapy & Functional Testing

Date Range	Test / Program	Findings / Comments	Page Reference
07/01–09/15/2021	Outpatient PT (Initial)	Attended 10 sessions; pain decreased 15%; standing tolerance 15 min; unable return to work.	(194–215)
06/17–06/19/2022	Inpatient PT Evaluation (Hospitalization)	Guarded gait; required supervision; recommended continued outpatient therapy.	(332–338)
04/01–05/28/2024	Aquatic Therapy Program	8 visits; improved flexibility; pain reduction 1 point on VAS.	(628–642)
09/10/2023 & 01/12/2025	Functional Capacity Evaluations (FCE)	Sedentary–light demand level; lift ≤ 10 lbs; stand ≤ 15 min; sit ≤ 45 min.	(505–519, 733)

D. Diagnostic Summary Overview

- **Imaging Trend:** Progressive degenerative change L4-L5 → L5-S1 from 2021–2024; radiographically stable by mid-2025.
- **No acute fracture, compression, or new herniation** documented after initial injury.
- **Electrocardiographic and laboratory** data show no secondary systemic cause for pain.
- **Functional testing** consistently demonstrates chronic mechanical and neuropathic limitation with limited improvement despite therapy.

III. Medication History (Reference Pack)

(January 2021 – September 2025)

A. Current Long-Term Medications (as of September 2025)

Medication / Dosage	Indication	Start Date	Status / Response	Page Reference
Metformin 1000 mg BID	Type 2 Diabetes Mellitus	2018 (continued)	Maintained A1C 6.9–8.2 %; well-tolerated.	(41, 453, 748)
Lisinopril 20 mg daily	Hypertension	2018 (continued)	Consistent BP control (~122/74 mmHg).	(46, 681)
Gabapentin 400 mg TID	Neuropathic Pain / Radiculopathy	Aug 2021	Reduces nerve pain ~30 %; mild sedation.	(183, 567, 720)
Duloxetine 60 mg daily	Neuropathic Pain & Depression	Feb 2022	Improved mood and pain modulation (~20 % relief).	(275, 425, 720)
Sertraline 100 mg daily	Depression / Anxiety	Jan 2023	Improved sleep and affect; no side effects.	(471, 649, 865)
Tramadol 50 mg q6h PRN	Breakthrough Pain	May 2024	Used intermittently; effective for flares.	(657–672)
Hydrochlorothiazide 25 mg daily	Adjunct for BP control	2020 (continued)	Maintains stable BP; no electrolyte issues.	(52, 742)

B. Previous / Trial Medications

Medication / Dosage	Indication	Date Range	Outcome / Reason Discontinued	Page Reference
Cyclobenzaprine 5 mg TID PRN	Muscle spasm (acute injury)	May–Jul 2021	Caused drowsiness; stopped after initial phase.	(120–128)
Naproxen 500 mg BID	Acute pain post-fall	May–Aug 2021	Gastrointestinal irritation; replaced with OTC NSAIDs.	(119, 150)

Medication / Dosage	Indication	Date Range	Outcome / Reason Discontinued	Page Reference
Epidural Steroid Injections (3 total)	Lumbar radiculopathy	Oct 2021 – Oct 2024	Temporary 30–40 % relief; no lasting effect.	(243, 269, 704)
Duloxetine 30 mg trial dose	Neuropathic pain	Jan–Feb 2022	Dose titrated up for better response.	(275)
Sertraline 50 mg daily	Depression initiation phase	Jan–Apr 2023	Dose increased to 100 mg for partial response.	(471–480)
NSAIDs (OTC Ibuprofen 800 mg PRN)	Pain control throughout course	2021 – Present	Continued adjunct; intermittent use.	(345, 657)

C. Medication Effect and Tolerance Summary

- **Analgesics / Neuropathic Agents:** Gabapentin and Duloxetine produce moderate relief; no evidence of opioid dependence.
- **Antidepressants:** Sertraline well-tolerated and effective for secondary depression.
- **Antihypertensives / Diabetes Control:** Metformin and Lisinopril remain cornerstones of chronic disease management with consistent laboratory stability.
- **Side Effects:** Occasional sedation (Gabapentin), dry mouth (Duloxetine); no serious adverse reactions.
- **Polypharmacy Review:** No drug-drug interactions identified; regimen reviewed semi-annually by primary care.

D. Therapeutic Notes

- Patient remains highly compliant with daily medication regimen; pill counts and refill logs consistent through 2025 (748–755).
- Pain management adjustments followed evidence-based sequencing before considering invasive procedures.
- Current combination therapy has optimized symptom stability without progression of pharmacologic risk.

IV. Provider History (Reference Pack)

(January 2021 – September 2025)

A. Treating and Consulting Providers

Provider / Facility	Specialty / Role	Date Range of Care	Key Involvement / Notes	Page Reference
Dr. L. Hart, MD – Lakeside Primary Care	Primary Care / Internal Medicine	Jan 2021 – Present	Oversaw chronic conditions (diabetes, hypertension); coordinated referrals to ortho, pain, and psych; maintained long-term medical leave documentation.	(41–52, 681–875)
Dr. R. Patel, MD – Metro Orthopedics	Orthopedic Surgery	Sept 2021 – Jul 2025	Evaluated post-injury back pain; performed exams, reviewed MRIs; administered first epidural; discussed but deferred surgical options.	(231–617, 812)
Dr. J. Owens, DO – Pain Management Specialists	Interventional Pain Medicine	Jan 2022 – Aug 2025	Managed chronic lumbar radiculopathy; performed multiple epidurals; adjusted Gabapentin / Duloxetine dosing; monitored opioid use; considered stimulator trial.	(262–275, 704–718)
Dr. R. Lewis, MD – Endocrine Associates	Endocrinology	Mar 2023 – Feb 2025	Monitored diabetes and metabolic effects of limited activity; optimized Metformin dosing; reviewed A1C trends.	(453, 748)
Dr. S. Nguyen, PhD / LP – Behavioral Health Services	Clinical Psychology / CBT	Feb 2023 – Oct 2025	Provided weekly CBT; coordinated with psychiatry for medication adjustments; noted	(471–498, 865)

Provider / Facility	Specialty / Role	Date Range of Care	Key Involvement / Notes	Page Reference
			improved coping and mood stabilization.	
Dr. T. Miller, MD – Psychiatric Associates	Psychiatry / Medication Management	Jan 2023 – Sept 2025	Managed antidepressant therapy (Sertraline); documented reduction in depressive symptoms; supported ongoing disability claim.	(471–498, 649–865)
ABC Physical Therapy Center	Physical Therapy / Rehabilitation	Jul 2021 – May 2024	Conducted outpatient and aquatic therapy programs; detailed functional tolerance, pain scores, and limited improvement.	(194–215, 628–642)
Metro General Hospital	Acute Care / Emergency Department	May 2021 & Jun 2022	Treated initial fall injury and later chest-pain admission; provided diagnostic imaging and short-term PT assessment.	(112–128, 301–338)
Advanced Imaging Center	Radiology / Diagnostic Services	2021 – 2025	Performed serial MRIs (2021, 2022, 2024, 2025); findings document degenerative progression then stabilization.	(177, 243, 603–610, 835–840)
ABC Pain Psychology Group	Behavioral Pain Rehabilitation	Oct 2022 – Dec 2024	Provided cognitive-behavioral pain coping sessions; integrated biofeedback; noted partial improvement.	(392–498, 649)
Occupational Health & Vocational Services	Disability / Work Capacity Review	2021 – 2025	Completed FCEs (2023, 2025); confirmed sedentary-light functional status; unable to return to prior employment.	(505–519, 733)
Primary Care Nursing Team	RN / Clinical Support	2021 – 2025	Coordinated refills, vitals, and patient communication; ensured medication compliance documentation.	(681–755)
Pharmacy Records – CVS and OptumRx	Dispensing Pharmacy	2021 – 2025	Dispensed chronic medications; refill adherence consistent; no controlled-substance discrepancies.	(720–755)

B. Provider Interaction Summary

- **Primary coordination:** Dr. Hart (PCP) served as the central medical coordinator and certifying physician for disability paperwork.
- **Specialist network:** Orthopedic and pain-management specialists managed the spine condition; psychiatry and psychology addressed secondary depression and coping.
- **Therapy continuum:** PT records demonstrate compliance with all recommended rehabilitation programs, including aquatic therapy and FCE evaluations.
- **Continuity:** Documentation shows unbroken medical follow-up from 2021–2025 with consistent treatment philosophy emphasizing conservative management and symptom stability.



V. Thank You & Next Steps

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