

ATTENDING PHYSICIAN STATEMENT SUMMARY

APS Summary: Adams, Timothy

Individual disability application · APS from primary care plus 342 attached pages · Case #IME-4812

APPLICANT	Adams, Timothy (fictional)
CASE NO.	IME-4812
APS SOURCE	A. Okonkwo, MD, primary care, APS form dated 09/15/2026 (p. 1 to p. 6) with attached records
FILE	342 pages in 2 packets. 11 duplicate pages removed before review. p. 140 is a wrong-patient page (different name and DOB), quarantined and excluded.
PREPARED FOR	N. Fairweather, brokerage case manager
PREPARED BY	Medrecords AI draft, 10/08/2026, for case manager review

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Medrecords AI demo case. Every name, provider, date and page in this document is fictional.

Overview

This summary condenses the APS form and its 342 attached pages into the items an underwriter asks a case manager for: what conditions appear and when, what medications changed, what the numbers were, what the plan says and which providers the applicant did not list. Each line cites its page. It assigns no risk class, no rating and no recommendation.

Impairments as documented, with first-appearance dates

CONDITION AS WRITTEN	FIRST APPEARS	SOURCE OF FIRST MENTION	LATEST MENTION	ON APPLICATION?	CITE
Right knee medial meniscus tear	03/03/2026	MRI report, Riverbend Imaging	08/26/2026, orthopedic note	Yes	p. 131, p. 105
Hypertension	01/27/2026 (problem list gives onset "2021")	Primary care problem list	09/15/2026, APS form, question 4	Yes	p. 31, p. 3
BMI 31.2	01/27/2026	Primary care vitals	09/02/2026, BMI 30.4	Not asked on form	p. 31, p. 118
Low back pain, 2020	01/27/2026	Intake history: "chiropractic care 2020 for low back, resolved"	No later mention	No	p. 32
Tobacco use, former	01/27/2026	Social history: "quit 2023, 10 pack-years"	09/15/2026, APS form, question 7	Yes (listed as never)	p. 32, p. 4
Snoring, daytime sleepiness	09/02/2026	Primary care note: "reports snoring and daytime sleepiness; sleep study referral placed"	Same visit	No	p. 118

CONDITION AS WRITTEN	FIRST APPEARS	SOURCE OF FIRST MENTION	LATEST MENTION	ON APPLICATION?	CITE
Elevated fasting glucose	09/02/2026	Lab report: fasting glucose 108 mg/dL, flagged high by the lab	Same date	No	p. 121

The APS form answers "never" to tobacco (p. 4). The 01/27/2026 social history records "quit 2023, 10 pack-years" (p. 32). Both entries are shown as written. This summary does not resolve the difference.

Medication changes by date

DATE	MEDICATION	CHANGE AS DOCUMENTED	PRESCRIBER	CITE
01/19/2026	Ibuprofen 600 mg	Started, 3 times daily as needed, 10 days	K. Doyle, PA-C, emergency dept.	p. 14
01/27/2026	Meloxicam 15 mg daily	Started; ibuprofen stopped	A. Okonkwo, MD	p. 33
01/27/2026	Lisinopril 10 mg daily	Continued (listed as existing)	A. Okonkwo, MD	p. 33
02/18/2026	Tramadol 50 mg	Started, every 6 hours as needed, 20 tablets, no refills	L. Marchetti, MD	p. 62
03/11/2026	Tramadol	Not renewed; "patient declines further opioid"	L. Marchetti, MD	p. 72
05/27/2026	Lisinopril	Increased to 20 mg daily; reason recorded "BP above goal on 2 visits"	A. Okonkwo, MD	p. 101
09/02/2026	Meloxicam	Continued; "recheck creatinine in 3 months"	A. Okonkwo, MD	p. 119

Vitals and labs by date

DATE	BP	HR	WEIGHT, BMI	LABS AS REPORTED	CITE
01/19/2026	148/92	88	218 lb, not calculated	None	p. 10
01/27/2026	142/90	76	216 lb, 31.2	None drawn	p. 31
05/27/2026	146/94	74	214 lb, 30.9	None drawn	p. 100
09/02/2026	134/84	72	211 lb, 30.4	Fasting glucose 108 (H); A1c 5.8; creatinine 1.0; total cholesterol 212 (H); LDL 138 (H); HDL 41; triglycerides 165	p. 118, p. 121
09/15/2026	132/82 (APS form, "most recent")	Not recorded	211 lb	Form references 09/02 labs	p. 2

Plan lines quoted from the record

DATE	PLAN (VERBATIM)	CITE
01/27/2026	"Orthopedic referral. Continue lisinopril. Recheck BP 4 weeks."	p. 33
05/27/2026	"Increase lisinopril to 20 mg. Home BP log. Follow up 3 months with fasting labs."	p. 101
08/26/2026	"Right knee arthroscopy pending authorization. Follow-up 2 weeks post-op."	p. 105

DATE	PLAN (VERBATIM)	CITE
09/02/2026	"Sleep study referral. Repeat lipids and glucose in 6 months. Continue meloxicam, recheck creatinine 3 months."	p. 119
09/15/2026	APS form, prognosis field: "Good. Expected full recovery of knee after arthroscopy."	p. 5

Providers in the record not listed on the application

PROVIDER	WHERE IT APPEARS	WHAT THE RECORD SHOWS	CITE
Riverbend Emergency Department	ED visit 01/19/2026	Knee injury visit; vitals recorded	p. 9 to p. 16
Northgate Physical Therapy	PT evaluation and 7 visits, 04/02/2026 to 05/14/2026	Therapy course for right knee	p. 188 to p. 240
Summit Work Capacity Services	FCE 08/05/2026	Functional capacity evaluation	p. 301 to p. 318
Unnamed chiropractor, 2020	Intake history, 01/27/2026	"Chiropractic care 2020 for low back"; no records attached	p. 32
Harbor Sleep Medicine (referral placed)	Primary care note, 09/02/2026	Referral placed; no visit in file	p. 119
Riverbend Imaging	MRI 03/03/2026	Imaging report	p. 131 to p. 133

What the record does not establish

- No sleep study result; the referral is 09/02/2026 and the file ends 09/15/2026.
- No operative report; surgery is pending authorization at the last orthopedic note (p. 105).
- No labs before 09/02/2026 in the attached pages, although the APS form lists the applicant as a patient since 2021 (p. 1).
- No home blood pressure log, although the 05/27/2026 plan requested one (p. 101).
- No records from the 2020 chiropractor.

No risk class, rating or underwriting recommendation appears in this summary. Medrecords AI organizes, cites and flags what is in the uploaded file. You review, you revise, you sign.