

Using Case Companion to Query your Files

What is Case Companion AI Assistant?

How can we help you today?

Tell me about @Josef Papito's @Medical Bills from @Sportelli and Pinnacle.pdf



What are the strengths and weaknesses of the case and how might I argue them to the adjuster?

Give me a summary of the treatments that the plaintiff underwent.

What was the impact of the accident on the plaintiff's life?

Identify the names of all medical providers, addresses and telephone numbers.

List the most important injuries.

Case Companion is EvenUp's AI Chat Q&A interface that streamlines case review by retrieving key facts, summarizing documents, and crafting narratives with line-level citations across all raw records – instantly.

Want to see Case Companion in action?

Check out this 3 minute video: <https://evenup.wistia.com/medias/5qt9h2q1lk>



Case Companion Navigation Tips

- Access from the *Cases page* in the EvenUp portal.
- Use *Ask Companion button* to open a larger query screen; show & search your questions.
- *Narrow / filter* for specific types of records, certain files, or individual plaintiffs to prioritize sources (important for large cases); choose from the options in bottom left search box or *tag* the file, file type, or plaintiff in your question by using the symbol @.
- Leave in *Balanced mode* for complex queries requiring thoughtful analysis; use *Fast mode* for simple discovery queries (i.e. Was plaintiff wearing seatbelt according to police report) switch to *Deep Thinking mode* for questions needing thorough evaluation or strategic insight (i.e. How would you negotiate this claim to maximize the award?).
- *Click citations* (circled numbers in responses) to verify sources & move forward with confidence.
- *Copy responses* into email as needed.
- *Be cautious* with questions involving significant *math* (e.g. “calculate the gaps in treatment; find the max”) – this is a known limitation.
- Always check responses. *The more specific you are, the better the answer!*
- *No one else* at your firm *can see your questions*, so feel free to ask anything.
- Use the *Thumbs Up/Thumbs Down* on responses to share feedback.

Please note that Case Companion cannot be used to write Demand Letters or MedChronS.



Case Companion Examples

Orienting yourself to a new case	• Summarize the case in no more than 5 bullet points. • Summarize the facts of the accident, in no more than 2 paragraphs. • Summarize all of patient's medical complaints and associated dates of complaint.
Extracting and organizing key case data	• Identify the names of all medical providers, addresses and telephone numbers. • List the most important injuries, and associated ICD codes. • List most important treatments & provide a count of the number of treatments. • Provide a list of prior medical conditions or prior related injuries. • Give me all the references to loss of household services. • <i>List every provider or treating physician in chronological order across the hospital stay (To use as a reference for record requests).</i>
Assessing the status of the plaintiff's treatment	• Are there any statements made about the plaintiff reaching maximum medical improvement? • Are there any inconsistent complaints after the incident date? • Provide a list of prior treatments. • List all referrals that have been made. • List all recommendations for future treatment.
Identifying case issues and strengths	• When was the last date of treatment of the client? Was the client officially discharged from care? • Identify any episodes where the patient did not show up for treatment, left treatment early, or refused treatment. • Are there any statements made about permanent injuries or long term disabilities? • Identify anything about the plaintiff that might make them particularly sympathetic (or not sympathetic) to a jury.

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Case Strategy & Communication	• What are the arguments an adjuster would likely use to argue this case is weak, and how might I counter them? • Write an email to an adjuster rejecting an initial offer to settle and provide references to support why this case is worth a higher settlement value. • Draft a narrative in long form prose detailing the Pain and Suffering that the plaintiff has experienced due to the accident. • <i>Write email to client with a summary of the injuries and treatments, as reported in the records. Ask if they are done treating or if any providers are missing.</i> • <i>What treatment would increase the value of the case?</i>
Examples of follow up questions aka conversations with Case Companion	Did the plaintiff have any preexisting <right knee> issues? Specifically are there any mentions of knee pain before the date of incident. • What were the plaintiff's complaints at first medical visit after the fall? • List any pain ratings on a scale of 1-10 that are 7 or higher. • Who recommended the plaintiff undergo surgery on <right knee>? • List the most important injuries → Put this into a table format → Add a column with ICD codes → Order by severity. • What are the arguments an adjuster would likely use to argue this case is weak, and how might I encounter them? → Draft an email to the adjuster addressing their reliance on arguments X and Y for their low offer. Use counterarguments and case strengths to justify a higher counteroffer.

Case Companion Examples

Example litigation questions	• Draft a set of deposition questions for the defendant aimed at establishing liability and uncovering accident details that support the plaintiff's case. • Write a persuasive opening statement for the plaintiff in a personal injury trial, highlighting liability, emotional impact, and damages. • What are the key elements of negligence I should highlight to establish liability? • What are effective discovery strategies for uncovering evidence of negligent maintenance practices?
Example questions you may choose to use while reviewing and editing Express	Facts & Liability: • Give me a summary of the incident details. • Did my client's account of the incident change during the course of care? • Did my client report any pain immediately after the incident?
Demands	Provider Summaries & FME: • Did my client suffer a permanent impairment? • Identify if any providers stated that my client's injuries were caused by the incident. • Did my client receive [diagnostic testing/injection/procedure]? • What were the most important injuries that my client suffered? • Did my client have any pre-existing injuries? • Identify the future treatments recommended to my client. • Identify any gaps or discrepancies in my client's treatment. • Did my client undergo unrelated treatment? Pain and Suffering: • What were the impacts of the incident on my client's life? • Will my client need long-term treatment in the future?

