SAMPLE FORMAT — FICTIONAL DATA. All names, providers, dates and amounts are invented to show the format. No real patient or case information is used.

Case-file index

MATTER	PAGES ORGANISED	FORMAT DELIVERED	FIRM MATTER REF.
Sample v. Example Freight LLC	233	Bookmarked PDF + this index	[Firm ref.]

Tab	Section	Contents	Bates range	Count	Status
1	Pleadings and correspondence	Engagement letter; letter of representation to insurer; claim acknowledgment	COR 0001–0012	3 docs	Complete
2	Police and incident	Traffic collision report; photographs of vehicles (24); witness statement	INC 0001–0038	3 docs	Complete
3	Insurance	Defendant auto policy declarations; client PIP/MedPay declarations; claim correspondence	INS 0001–0029	6 docs	Missing: UM/UIM declarations
4	Medical records	EMS, ED, PCP, PT, imaging, pain management (see chronology)	MED 0001–0094	6 providers	Requested: prior PCP records
5	Medical bills	Itemised bills and EOBs for 6 providers	BILL 0001–0026	6 providers	Complete
6	Wage loss	Employer letter; pay stubs (Jan–Mar 2025); work restriction note	WAG 0001–0011	3 docs	Missing: 2024 W-2
7	Property damage	Repair estimate; rental invoice; total-loss valuation	PD 0001–0017	3 docs	Complete
8	Liens	Health-plan lien notice; provider letter of protection	LIEN 0001–0006	2 docs	Confirm lien amount

Missing-documents list (for the demand package)

Document	From	Why it matters	Requested on
UM/UIM declarations page	Client's auto insurer	Shows available underinsured cover	[date]
Prior PCP records (2022–2025)	Oakline Family Practice	Pre-existing neck complaints, if any	[date]
2024 W-2	Client	Supports the wage-loss calculation	[date]
Final lien amount	Health plan	Needed before settlement distribution	[date]

Naming convention used

[Tab]-[Bates start]_[Date YYYY-MM-DD]_[Source]_[Document], for example **4-MED0075_2025-07-28_PacificSpine_Consult.pdf**. Every page carries a bates number; the index links to the bookmarks.

Prepared as a draft for review by the supervising attorney. MarkBridge is not a law firm and does not give legal or medical opinions; entries summarise what the records state, with page references to the bates-numbered set.