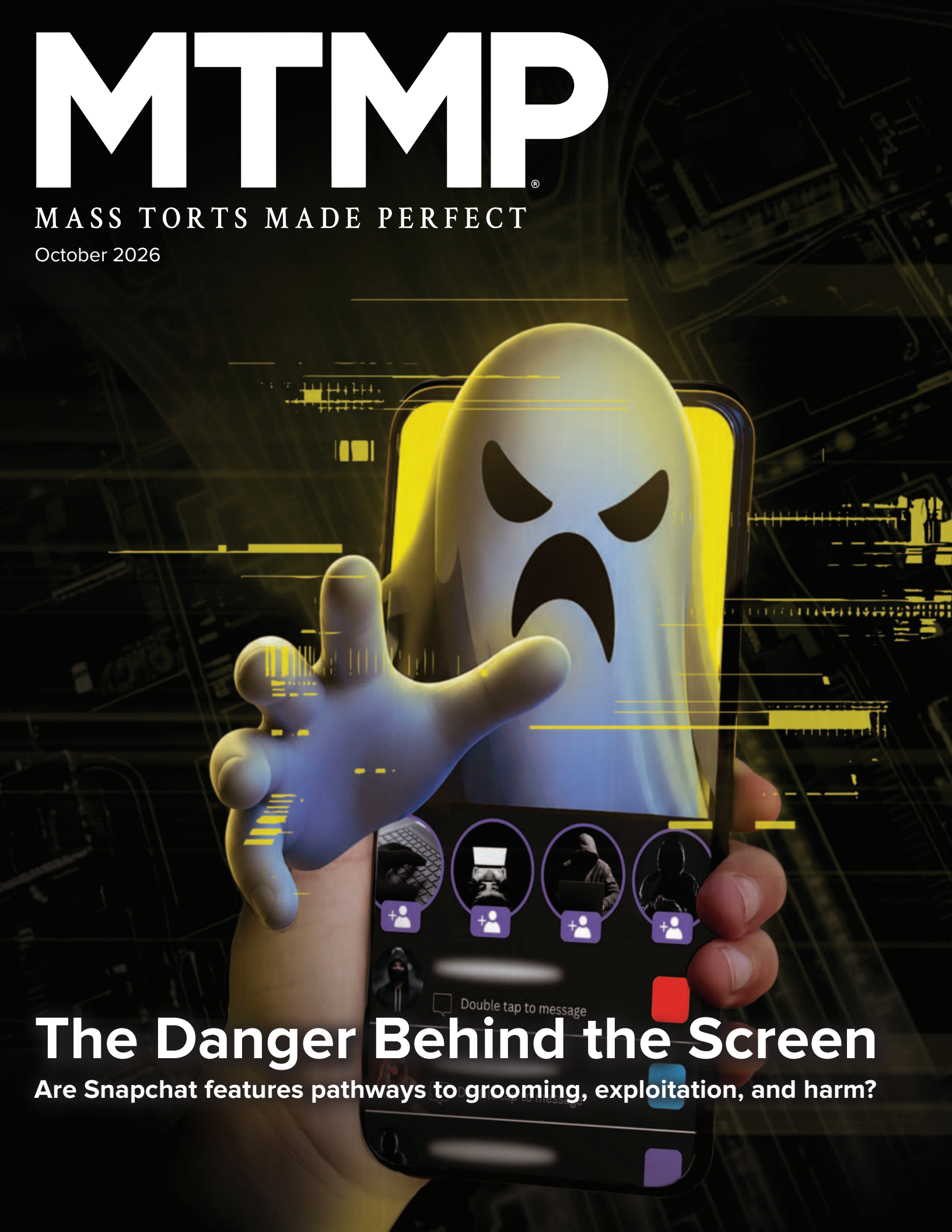
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FEATURE

Turning Medical Records Into **Litigation Intelligence**

by **Sara G. Stephens,** Editor-in-Chief

National Record Retrieval, recipient of the 2026 MTMP Legal Services Innovation Award, is helping plaintiffs' firms treat record retrieval and review as a strategic part of mass tort case development—not merely an administrative function.

In mass tort litigation, medical records influence nearly every important decision a plaintiffs' firm makes. They help determine whether a claimant meets threshold injury criteria, whether the alleged exposure and diagnosis align, whether pre-existing conditions complicate causation, and whether a case is ready for expert review or settlement.



Josh Habegger, president of National Record Retrieval

Before attorneys can use that evidence, someone must obtain it from healthcare providers, track incomplete productions, organize thousands of pages, identify the material facts, and translate them into a format that legal teams can act upon.

National Record Retrieval, LLC, recipient of the 2026 MTMP Legal Services Innovation Award, has built its work around making that process more efficient, consistent and useful to plaintiffs' firms.

"Medical records are the factual foundation of nearly every mass tort claim," said Josh Habegger, president of National Record Retrieval. "Before a case can move toward litigation or settlement, firms need confidence that they have a complete medical history, organized in a way that allows attorneys to quickly identify the facts that matter."

The MTMP Legal Services Innovation Award recognizes individuals and companies that demonstrate leadership, entrepreneurship, creativity, and innovation in serving the legal profession. In National Record Retrieval's case, that innovation reflects a broader shift in how firms view medical-record operations—from back-office support to an essential component of case screening, litigation strategy and client service.

A FUNCTION THAT TOUCHES THE ENTIRE CASE

As mass tort inventories have expanded, record retrieval has become more consequential. A delay

in obtaining records can hold up intake decisions, plaintiff fact sheets, expert analysis, and settlement evaluations. Incomplete records can create even greater challenges, leaving firms without the information necessary to evaluate injuries, treatment histories, or potential defenses.

"Most firms prefer to outsource medical record retrieval and review, but until a firm has handled those functions in-house, it often underestimates how much time, coordination, and attention to detail proper record work requires," Habegger said.

That complexity is heightened by the fragmented nature of the healthcare system. A single claimant may have records spread across hospitals, specialists, pharmacies, diagnostic facilities, and primary-care providers, each with its own procedures, forms and response times.

Effective record review involves far more than arranging documents chronologically. Firms need relevant information pulled and presented in a way that supports litigation strategy.

"Firms are no longer simply collecting documents—they're extracting meaningful data," Habegger said. "Whether identifying qualifying injuries, confirming exposure timelines, documenting treatment history, or highlighting key medical events, organized record review enables firms to make informed decisions earlier in the litigation process."

For attorneys managing large inventories, that earlier access to structured information can reduce time spent searching through charts and allow legal teams to focus more directly on case development and advocacy.

REPLACING FRAGMENTED WORKFLOWS

The operational pressures become more pronounced with large caseloads containing data from multiple healthcare sources.

"The biggest challenge is not simply the volume of records—it is the inconsistency that comes with managing thousands of cases across hundreds of healthcare providers, each with different processes, response times, formats, and requirements," Habegger said.

Those external inconsistencies can be compounded by internal fragmentation. Retrieval may be handled by one team, review by another, and case management by a third, with each group maintaining separate data or duplicating work.

Habegger said firms that scale effectively tend to approach those functions as one connected process.

"They are standardizing review criteria, centralizing medical data, leveraging technology to automate repetitive processes, and partnering with service providers that can seamlessly integrate into their existing case management systems," he said.

An integrated model like this can give firms greater visibility into the status of individual claims and entire inventories. It may also help prevent important information from remaining isolated in a review report, spreadsheet, or vendor portal rather than reaching the attorneys and staff responsible for litigation decisions.

Technology is an important part of that effort, but Habegger cautioned against assuming that software alone can resolve every operational problem.

"When a vendor sells its services based purely on technology, firms should ask hard questions about compliance, accuracy, oversight, and how that provider is filling the gaps with experienced people and proven processes," he said.

The distinction is especially important in medical-record work, where a system may identify a diagnosis or treatment date but fail to understand its significance within a particular litigation.

MOVING REVIEW EARLIER IN THE CLAIM LIFECYCLE

One of the most significant changes in mass tort operations is the point at which firms begin analyzing medical evidence.

"Several years ago, medical record review was often treated as a later-stage litigation task," Habegger said. "Today, it has become a critical part of early case assessment."

Structured reviews are increasingly used during intake and screening to determine whether a claimant appears to meet litigation-specific criteria. They may reveal a qualifying diagnosis, establish the timing of an alleged injury, identify alternative explanations, or uncover pre-existing conditions that affect case viability.

The speed of that analysis has also changed dramatically. Habegger noted that, not long ago, reviewers often had to review every page manually, and a turnaround of two or three weeks could be considered expedited. Technology has upended those processes.

"That shift has been a game changer for mass tort operations," he said. "AI can quickly surface relevant diagnoses, treatment patterns, injury indicators, and potential red flags, allowing firms to move faster and make earlier decisions."

> “Technology is important, but trust remains the deciding factor.”
>
> —**Josh Habegger,** President of National Record Retrieval

National Record Retrieval’s approach, however, does not treat AI output as the final word. Habegger emphasized that medical evidence still requires the human component.

“A knowledgeable reviewer can validate the AI output, apply litigation-specific judgment, and catch nuances that technology alone may miss,” he said.

The most effective model, in his view, combines machine-assisted speed with human oversight. Once the relevant information is standardized, firms can use it for multiple purposes throughout the case rather than repeatedly reviewing the same records for intake, plaintiff fact sheets, expert work, and settlement preparation.

Large dockets also require consistency. Applying the same review criteria across an inventory can help firms compare claims more reliably and reduce variations caused by different reviewers using different methods.

WHAT FIRMS SHOULD DEMAND FROM VENDORS

Innovation in legal services is about more than processing records faster. When vendors handle large volumes of protected health information, security and accountability must remain central to the relationship.

“Technology is important, but trust remains the deciding factor,” Habegger said.

He advises firms to examine how a vendor protects information.

“Given the sensitive nature of this data, security and compliance are non-negotiable,” he said. “Firms should understand how information is protected, who has access to it, and what safeguards are in place throughout the entire process.”

Transparency is also critical. Legal teams need meaningful information about outstanding requests, expected turnaround times, and provider-related obstacles. Without that visibility, firms may struggle to manage deadlines or explain delays to clients.

“Strong communication reduces uncertainty and allows legal teams to proactively manage their cases,” Habegger said.

He also believes firms should expect vendors to take ownership of outcomes rather than merely process assignments.

“A legal service provider shouldn’t simply complete assigned tasks—they should function as a true extension of the firm’s operations,” he said. “That means adapting to each firm’s workflow, providing customized solutions and API integrations, maintaining consistent quality, and taking ownership of results.”

This type of partnership approach is particularly valuable in mass tort litigation, where firms may need to alter screening criteria, reporting structures, or review priorities as a docket evolves.

BALANCING SPEED, ACCURACY, AND JUDGMENT

Looking ahead, Habegger expects artificial intelligence, workflow automation, and structured data to play an even larger role in mass tort practice. The challenge will be using those tools without compromising what truly matters.

“The future of mass tort operations will be shaped by the ability to balance cost, speed, accuracy, and compliance through the intelligent combination of technology, structured data, and experienced human oversight,” he said.

That balance is essential because the fastest result is not always the most valuable.

“Speed alone is not enough,” Habegger said. “Medical records require context, judgment, and litigation-specific interpretation to ensure the information is accurate, complete, and useful to the case.”

For National Record Retrieval, the future of legal services lies in helping firms transform raw medical records into reliable litigation intelligence. That means reducing duplicate work, shortening cycle times and producing structured information that can move across a firm’s operations.

“The expectation is no longer simply to retrieve records,” Habegger said. “It is to deliver cost-effective, accurate, and compliant information that helps firms evaluate cases faster, operate more efficiently, and better serve their clients.”

It is this evolution—from document collection to strategic case support—that sits at the heart of National Record Retrieval’s recognition as the 2026 MTMP Legal Services Innovation Award recipient.

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