

UNITED STATES DISTRICT COURT FOR THE WESTERN DISTRICT OF
OKLAHOMA

Karen Johnson, individually and as Personal Representative of the
Estate of Matilda Tidwell, deceased v. PF Crystal Park SNF OPS,
LLC; & Stonegate Senior Living, L.P.

Johnson v. PF Crystal Park · No. CIV-24-1073-R · Decided December 23, 2025

SUMMARY

The United States District Court for the Western District of Oklahoma resolves Plaintiff Karen Johnson’s motion to compel discovery in a nursing-home negligence and wrongful-death action. The court grants the motion in part, requiring production of specified nonprivileged communications, medication administration records, relevant medication-related complaints, and the names of the facility’s governing body members, subject to privacy and privilege limitations. The court finds the motion moot as to a medication error report already produced and directs Defendant to supplement its discovery responses within 21 days.

CASE DETAILS

COURT	United States District Court for the Western District of Oklahoma
JURISDICTION	United States District Court for the Western District of Oklahoma
DECIDED	December 23, 2025
DOCKET	CIV-24-1073-R
DISPOSITION	other
PROCEDURAL POSTURE	Plaintiff moved to compel discovery responses from Defendant PF Crystal Park SNF Ops, LLC in a federal nursing-home medical-malpractice and wrongful-death action.
STANDARD OF REVIEW	Discovery rulings are reviewed under the district court's substantial discretion. Under Federal Rule of Civil Procedure 26(b)(1), discovery must concern nonprivileged matter relevant to a claim or defense and proportional to the needs of the case; the court must limit discovery that is unreasonably cumulative, duplicative, burdensome, available from a more convenient source, or outside the permitted scope.
PRECEDENTIAL VALUE	unknown

TOPICS

discovery dispute

nursing home liability

medical records privacy

hipaa

civil procedure

PRACTICE AREAS

civil procedure

health law

nursing home liability

medical malpractice

evidence

QUESTIONS PRESENTED

1. Whether Plaintiff was entitled to compel production of documents concerning the medication error, communications relating to Tidwell, medication administration records, complaints concerning medication errors, and the facility's governing-body members.
2. Whether Plaintiff's direct-negligence theories against the nursing-facility defendant remained relevant to the scope of discovery absent a stipulation that the defendant's liability would be limited to respondeat superior.
3. Whether privilege, HIPAA, confidentiality, relevance, proportionality, and burden objections justified withholding or broadly redacting the requested discovery.

HOLDINGS

1. The request to compel compliance with RFP No. 19 was moot because Defendant represented that it had produced the responsive Medication Error Report and Plaintiff did not dispute that representation.
2. The motion to compel RFP No. 9 was granted to the extent Defendant located relevant, nonprivileged, pre-litigation responsive documents, subject to the limitations represented by Defendant, including exclusion of attorney-client and quality-assurance or peer-review materials.
3. Because Defendant had not stipulated that its liability, if any, would be limited to respondeat superior, Defendant's direct liability for allegedly negligent administrative and supervisory conduct remained at issue and informed the relevance and proportionality of discovery.
4. Plaintiff was entitled to production of the Administrative Medication Report, but Defendant could redact patient-identifying information and any privileged physician-patient communications, quality-assurance material, incident reports, or other privileged information. The produced records were subject to restrictions on disclosure, use, and return.
5. Relevant complaints concerning medication errors or medication administration lodged during the two years before Tidwell's medication incident had to be produced in appropriately redacted form. Post-incident complaints were outside the appropriate scope, and Defendant did not have to produce the Grievance Internal Reporting List if doing so would reveal privileged incident reports or quality-assurance materials.
6. Defendant was required to provide the names of the members of its governing body because those individuals were relevant to Plaintiff's claims that Defendant failed to fulfill its administrative and supervisory duties.

KEY QUOTATIONS

“Rule 26 permits discovery into “any nonprivileged matter that is relevant to any party's claim or defense and proportional to the needs of the case.””

“The names of the members of the governing board who establish the policies are clearly relevant to Plaintiffs assertions of Defendant’s direct negligence.”

FACTUAL BACKGROUND

Matilda Tidwell, age 94, was admitted to the Accel at Crystal Park nursing facility after hospitalization for injuries from a fall. A certified medication aide mistakenly administered Tidwell 100 milligrams of morphine intended for another patient, after which Tidwell was hospitalized, transferred to hospice, and died. Her daughter and personal representative alleged that Defendants and their agents were negligent or reckless in providing care and in performing administrative, hiring, training, retention, and supervisory functions.

PROCEDURAL HISTORY

Plaintiff sued Defendants in federal court, asserting negligence, willful and reckless conduct, and direct administrative and supervisory negligence arising from a medication error involving a nursing-home resident who later died. Plaintiff moved to compel production of documents and an answer to an interrogatory. The court granted the motion in substantial part, declared one request moot, imposed privacy and privilege redactions and other limitations, and ordered supplemental discovery responses within 21 days.

DISPOSITION

other

CASES CITED

- *Murphy v. Deloitte & Touche Grp. Ins. Plan*, 619 F.3d 1151, 1164 (10th Cir. 2010)
- *United States ex rel. Shamesh v. CA, Inc.*, 314 F.R.D. 1, 8 (D.D.C. 2016)
- *Oppenheimer Fund, Inc. v. Sanders*, 437 U.S. 340, 351 (1978)
- *Jobson v. United States ex rel. Department of Veterans Affairs*, No. CIV-17-574-SLP, 2018 WL 8299885, at *2 (W.D. Okla. Aug. 27, 2018)
- *Huntley v. City of Owasso*, 497 F. App'x 826, 834 (10th Cir. 2012)
- *N.H. v. Presbyterian Church (U.S.A.)*, 998 P.2d 592, 600 (Okla. 1999)
- *Jordan v. Cates*, 935 P.2d 289, 293 (Okla. 1997)
- *Strubhart v. Perry Memorial Hospital Trust Authority*, 903 P.2d 263, 276 (Okla. 1995)
- *Jackson v. Terrace Gardens Nursing Ctr., LLC*, No. CIV-23-00319-JD, 2025 WL 1020888, at *3 (W.D. Okla. Apr. 4, 2025)
- *Pruess v. Presbyterian Health Plan, Inc.*, 579 F. Supp. 3d 1235, 1240 (D.N.M. 2022)
- *Hussein v. Duncan Regional Hospital, Inc.*, No. CIV-07-0439-F, 2009 WL 10672479, at *1 n.1 (W.D. Okla. Apr. 28, 2019)
- *City of Edmond v. Parr*, 587 P.2d 56, 58 (Okla. 1978)

- *Schneiderhan v. Four Seasons Nursing Home Centers, Inc.*, CIV-00-1707-C
- *Wethington v. Swainson*, No. CIV-14-899-D, 2017 WL 1366068, at *3 (W.D. Okla. Apr. 12, 2017)

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