BurgeonLegal
GROUP LTD CO

Referral Checklist

Please provide us with the following documents for each new referral:

- Brief summary of history/issue/key facts, dates, and contacts
- Face Sheet (and indication as to resident's capacity, if not indicated therein)
- Amount and source of income/resources (to extent known) and the recipient of each (eg. facility/trust, family, resident via direct deposit, etc.)
- Admission Agreement
- POA and/or GU or Conservator documents (if applicable)
- Current invoice (indication as to whether the balance is MA-pending, private or a combination)
- Copies of any internal correspondence/collection notes, emails, etc. that track the case history between the facility and family/resident and between the facility and agency
- Copies of MA application(s), any notice(s) (checklists, denials/terminations, extensions, etc), and correspondence between the facility and family/resident and/or the facility and agency/MA office
- Other information or documents that may be relevant (eg. documents related to transfer/property; property search/asset search if you conduct them; contact information for caseworker, if you have been corresponding directly with them, contact for family members not on face sheet; copies of an annuity at issue, bank statements or bank account information if at issue, etc.)

Ready to Refer?

New referrals should be emailed to newmatters@burgeonlegal.com with supporting documents attached as .pdf files. Alternatively, information can be faxed or mailed to our corporate office in South Carolina. We will respond within one business day.