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.

Trusted Legal Partner to Health Care Providers Nationwide
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