



Attorney Intake Checklist

Pediatric medical-legal consultation | Elite Pediatric Concierge

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Use this checklist for a first email before records are sent. A short inquiry is enough to begin conflict review and determine whether the matter fits Dr. Basily's scope.

Do not send records by ordinary email. Medical records, protected health information, and confidential legal materials should wait until a secure transfer process is confirmed.

Include in the first email

- ☐ Case type and brief case posture.
- ☐ Parties and relevant entities for conflict review.
- ☐ Jurisdiction and key dates.
- ☐ Deadline or requested turnaround.
- ☐ Pediatric question to be reviewed.
- ☐ Requested scope: call, record review, written consultation, or expert support.

Helpful clinical context

- ☐ Child's age or age range at the relevant event.
- ☐ Care setting involved, such as newborn care, urgent care, emergency care, or hospital medicine.
- ☐ Primary documentation or escalation issue, if known.
- ☐ Whether the matter involves standard of care, causation context, systems review, or chronology work.

After conflict review

- ☐ Wait for conflict review before sending records.
- ☐ Confirm scope, fee terms, and timeline.
- ☐ Use the secure transfer process provided after engagement terms are confirmed.
- ☐ Request Dr. Basily's CV when appropriate after conflict review.

Boundaries

A website inquiry does not create a retained expert relationship, consulting engagement, attorney-client relationship, or physician-patient relationship. Clinical services are not for emergencies.