



NURSING HOME STAFFING - CASE INTAKE WORKSHEET

Use this worksheet to capture facts, pull LTCCC staffing data, and compute Actual vs Expected HPRD (Deviation).



1. ATTORNEY & CASE

Attorney Name	Phone
Firm/Agency	Internal Case ID
Email	Intake Date

2. FACILITY

Facility Name	City
CCN	State
Address	ZIP

3. RESIDENT & INCIDENT WINDOW

Resident Name	Discharge/Death
DOB	Incident From
Admission	To

4. LTCCC STAFFING DATA SNAPSHOT (BY QUARTER)

Quarter (e.g., 2025 Q2)

Contract %

Turnover %

Metric	RN HPRD	CNA HPRD	Total HPRD
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Actual

Expected

Deviation (Actual - Expected) /
Expected

5. ALLEGED HARMS / ISSUES (CHECK ALL THAT APPLY)

Pressure injury (DTI/Stage 2-4) []	Falls with injury
Infections (UTI, sepsis, COVID-19)	Weight loss / malnutrition
Dehydration / AKI	[Medication errors
Elopement / wandering	Abuse / neglect
Failure to supervise	Inadequate RN coverage
[Missed ADLs / toileting	Avoidable hospitalization / ER transfer

6. KEY RECORDS TO REQUEST (PRESERVATION)

PBJ source files & CMS feedback	Facility Assessment & updates
Unit-level schedules & assignment sheets	Care plans & assessments
Training/competency files	Agency contracts & weekly invoices
EHR audit trail	Survey deficiencies & plans of correction
Ownership/related-party agreements	Provider Data Report (LTCCC)
Call-bell logs / rounding sheets	Incident logs (falls, wounds, infections)

7. NOTES / NEXT ACTIONS

Date: _____

Date: _____