How To Use Correspondence Worksheet

1 Enter **Issue** you are addressing (i.e. Insurance, Disability, etc.) This makes it simple for follow-up on each specific issue. You may find it easier to create one sheet for each issue you are addressing. For a complete list of issues, refer to the **Concerns Worksheet** on our Support page.

2 Enter Contact Name and contact information in the **Contact Info Column.** Ask for their first and last name, position and department, email (if available), phone number and extension.

3 In the **Results** column, note the result of your contact. Suggestions for noting results are: **LM-left message; NA-no answer; WCB-will call back; FU-follow up**

4 In the **Patient Action Column,** enter correspondence you have been instructed to provide (i.e. send fax, letter, call back with information, etc)

5 In the **Expected Outcome** column, write the resolution that you expect to result from the correspondence you initiated for this issue or from providing further correspondence requested of you during this process.

6 The **Notes** column is provided for your convenience.

7 Keep these sheets together, perhaps on a clipboard or in a binder, for easy reference and follow up. Set aside a time weekly when this is your focus. By addressing these issues one by one, and with the support of easy documentation, you should feel more in control of your affairs.