

PHONE CALL LOG

Information from your insurance card (or have your insurance card handy):

Plan Name: _____

Member Name: _____

Member Date of Birth: _____

Identification Number: _____

Group Number: _____

Medical Record Number: _____

Effective Date: _____

Customer Service Phone Number: _____

WHY?

Reason for the call: _____

Date of service: _____ Date of denial: _____

WHEN?

Date of call: _____ Time of call: _____

WHO?

Name of the insurance representative: _____

Reference # for the call: _____

WHAT?

My questions (write down before the call):

1. _____

2. _____

3. _____

The representative's answers (write down during the call):

1. _____

2. _____

3. _____

WHAT IS NEXT?

The representative agreed to (include any deadlines):

1. _____

2. _____

I agreed to (include any deadlines):

1. _____

2. _____

WHEN WILL I FOLLOW UP?

I will (circle one) call/email/fax/write: _____, on this date: _____.

Check when added to calendar.

Check when complete.