

Phone Call Log

Information from your health plan card (or have your health plan 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 health plan 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.

OTHER NOTES: