



Insurance & Benefits Question Tracker

A Brightway Aging Advocacy Resource

A place to keep the details straight

Use this tracker for calls, portal messages, letters, reference numbers, and next steps.

Tip: After every call or message, write down the date, who you spoke with, the reference number, what was promised, and when to follow up.

Quick Case Information

Person / patient:

Date started:

Insurance / benefit program:

Member / policy ID:

Claim / case / authorization number:

Provider / facility:

Benefit or Coverage Type

- Medicare Medicare Advantage Medi-Cal / Medicaid Commercial insurance
 Long-term care Disability / leave Prescription plan Other

Important Contacts

Name / role	Phone / ext.	Email / portal / fax	Notes
Insurance plan	<input type="text"/>	<input type="text"/>	<input type="text"/>
Provider office	<input type="text"/>	<input type="text"/>	<input type="text"/>
Case manager	<input type="text"/>	<input type="text"/>	<input type="text"/>
Advocate / helper	<input type="text"/>	<input type="text"/>	<input type="text"/>

Questions I Need Answered

Use plain language. It is okay to write exactly what you want clarified.



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Call / Message Record #1

Write down what happened while it is still fresh. Keep names, dates, and reference numbers together.

Date: Time: Organization / department: Representative name / title:

Contact Method

Phone Portal message Email Letter / fax In person Voicemail left

Call / reference number: Authorization / claim / appeal number: Phone / extension used:

What I Asked

What They Said / Key Details

Include exact words if possible, especially approvals, denials, deadlines, or instructions.

Documents Requested, Sent, or Still Needed

Next Steps

Who is responsible? Action needed: Due date: Follow-up date:

Status: Open Waiting Approved Denied Appealed Resolved



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Call / Message Record #2

Write down what happened while it is still fresh. Keep names, dates, and reference numbers together.

Date: Time: Organization / department: Representative name / title:

Contact Method

Phone Portal message Email Letter / fax In person Voicemail left

Call / reference number: Authorization / claim / appeal number: Phone / extension used:

What I Asked

What They Said / Key Details

Include exact words if possible, especially approvals, denials, deadlines, or instructions.

Documents Requested, Sent, or Still Needed

Next Steps

Who is responsible? Action needed: Due date: Follow-up date:

Status: Open Waiting Approved Denied Appealed Resolved



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Call / Message Record #3

Write down what happened while it is still fresh. Keep names, dates, and reference numbers together.

Date: Time: Organization / department: Representative name / title:

Contact Method

- Phone Portal message Email Letter / fax In person Voicemail left

Call / reference number: Authorization / claim / appeal number: Phone / extension used:

What I Asked

What They Said / Key Details

Include exact words if possible, especially approvals, denials, deadlines, or instructions.

Documents Requested, Sent, or Still Needed

Next Steps

Who is responsible? Action needed: Due date: Follow-up date:

- Status:** Open Waiting Approved Denied Appealed Resolved



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Call / Message Record #4

Write down what happened while it is still fresh. Keep names, dates, and reference numbers together.

Date: Time: Organization / department: Representative name / title:

Contact Method

Phone Portal message Email Letter / fax In person Voicemail left

Call / reference number: Authorization / claim / appeal number: Phone / extension used:

What I Asked

What They Said / Key Details

Include exact words if possible, especially approvals, denials, deadlines, or instructions.

Documents Requested, Sent, or Still Needed

Next Steps

Who is responsible? Action needed: Due date: Follow-up date:

Status: Open Waiting Approved Denied Appealed Resolved



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Follow-Up Summary & Escalation Notes

Use this page to see what is still open and what needs to happen next.

Open Items to Follow Up

Issue / question	Who owes the answer?	Promised by	Follow-up date

Evidence / Documents to Keep Together

- Benefit booklet or policy language
- Portal screenshots
- Receipts / invoices
- Appeal forms
- Denial or approval letters
- Medical records or orders
- Prior authorization notes
- Proof of mailing or fax confirmation

Escalation / Appeal Notes

Supervisor names, appeal deadlines, complaint numbers, and anything that may need to be quoted later.

Additional Notes