



Things to Think About!

Creating a Documented Timeline

By Linda Jorgensen

I spend a lot of time writing about the importance of documentation and the role paperwork plays in obtaining services and benefits. Following through on authorizations, applications and various appeals is seriously time consuming but I know how important keeping paperwork up to date is. The services and benefits my daughter requires depend on my ensuring that pesky paperwork gets done. I spend, on average, about 20 hours a week doing just that. Paperwork.

Accurate documentation of a problem and all the communication, forms and letters generated involved is important. Detailing a problem from start to finish can involve large volumes of paperwork. Often the order in which letters, phone calls and other events occur will determine an outcome, especially if the problem involves deadlines and time sensitive materials. Keeping all the notes, forms, letters, documents and conversation notes in chronological order by date and on file is vital to a successful outcome regardless of the action being taken. It doesn't matter if you're in an IEP meeting, filing an authorization request, appeal or getting ready for a court hearing the process is the same. As I've said before, "If it isn't on paper it didn't happen" and once it's filed, "If you can't find it, it's useless".

The challenge comes in keeping all that documentation and information in a chronological time line and on file in a place that's quickly accessible. Ensuring the notes, letters and documents that you accumulate over time can be found, read or copied quickly for the party requiring them is your goal. There are several steps to ensuring you can find what you need when you need it.

Developing a Chronological Timeline

Step 1 ~ Note Taking

Start by locating a blank spiral notebook or composition book and several pens or pencils to use as

your timeline log. Keep these handy near the phone or where you open your mail. The first entry needs to be the date a problem started and what the problem is. You can write it any way you like as long as the basic information (dates, what, item/service, why, who, and action needed) and reference to forms or letters is covered in the entry. Here is a sample of what that first entry may look like:

*10 Feb. 2014 ~ received an EOB from XYZ insurance denying benefits for M's leg braces in mail today. EOB states code 123 "This service is not covered because preauthorization was not obtained/extended, or preauthorization was denied". Contacted "Terry" at XYZ insurance customer service re: "preauthorization problem". "Terry" states "no preauthorization was received for this item by the provider although it IS a covered service." (*See EOB in file dated 1 Feb 2014)*

Be sure to note any organizations and the individuals you talked to by name as well as a short synopsis of what was said. Once the initial entry is made you'll be able to document phone conversations, the arrival of forms, letters and email by date as they occur or are received. This becomes the narrative of your timeline.

Step 2 ~ No Paper Stacks!

Set up a battle box! Many times important detail gets left out of a timeline because the form or letter needed was not noted in the log and then filed in its proper place. This is the time to use the documentation you've been keeping. Create an action file for your problem. Use the file system that works for you. I prefer a small file crate with folders for each source of documentation (**see photo**). The main log (notebook) sits in front with supporting documentation filed behind. You may choose to use an accordion folder, a 3-ring binder, a designated file drawer, etc. Any container that can hold all the documentation you'll need regarding the problem you are working on. Keeping all of the documentation together in one place and in their assigned places is important! Copies of phone conversations (completed [call forms](#) or log

entries), letters you may have sent and received, bills, EOB's, letters of denial, etc. can all be used in the documentation process for the problem you are working on.

Step 3 ~ Record ALL Phone Conversations

Working a big problem requires many phone calls. It is important to keep track of these calls. Who you talked to, any decisions that may, or may not, have been made, dates, recommended action, etc. is important information. Every time you talk to someone on the phone regarding the problem write the date, name of the person with whom you talked and a general synopsis of the conversation. Use direct quotes if need be. You can make the entire note under the date in your timeline log or use a completed [call form](#) which can be filed in your battle box by date under "Phone Calls" or the header of your choosing. I prefer to use SNRP's Call Form (found [HERE](#)) for recording phone call information as the form has a spot for all pertinent information needing documentation. This way I don't forget anything while I'm on the phone. I'm simply filling in the blanks. A notation by date, "*Terry at XYZ Insurance called on 11 Feb 2014. See file for full conversation notes*" in my timeline log lets me know where to go to find the whole conversation while noting exactly what day and time, on the timeline, the call occurred. Everything is noted in chronological order.

Step 4 ~ Use your Log and Your Action File

A timeline log and a battle box will not do you a bit of good if you don't use them. Be sure to date and document all detail in your log as incidents and communication occurs. File all related communication you receive in the mail, via e-mail or over the phone. Be sure to outline the steps you have taken at the time and anything else you feel may be pertinent. Be detailed as some things you may think irrelevant may end up being important to your cause later. Print a copy of emails and even Face book posts if applicable and keep those on file. This prevents loss of information if an electronic file ends up corrupted or a post is deleted.

Step 5 ~ Document, Copy, Document

Any time you send an email, fax, letter or other communication make a copy for your record, note it in your timeline log with a date, list of any documents you are attaching for review, and then file it in the

appropriate file folder. If you send documentation via snail mail, be sure to include a tracking number which can be attached to your copy of the document you sent it with and then file. If an item is really important, send it certified mail, return receipt requested. You'll receive a signed signature card from the recipient dated when the postal service delivered the item and who it was that received it. Be sure to attach that card to the copy of the correspondence it went with and note it in your log under the dates you sent it out then the date you received the signed card back in the mail.

Step 6 ~ Using a Calendar Watch Timely Filing and Deadlines

Be sure to flag your calendar for a reasonable time to hear back from any organization or company you are communicating with. I generally give folks a week to 10 days as a good rule of thumb for a return reply. I mark the calendar on the date I should be hearing something. If you contact someone and they tell you, "for a day or two" but you don't hear anything by mid-day of the date you've got circled on the calendar, contact the individual or office you were working with that afternoon to find out where in the process your paperwork etc. is at. Don't become "lost" in the system. Keep track of where your paperwork is and who is working on what.

It is important to note if you want the services you need you'll have to go out and find them. Once you find them you'll often have to fight for them. No one is going to chase you down and insist you and your child get the services you need. Unfortunately paperwork is part and parcel of the system we have to deal with. Following the steps through an authorization process, filing a timely appeal or grievance can mean the difference between obtaining a service and losing it. Documenting and dating the process from start to finish increases your chances of getting what you need substantially.

