Have you ever needed to know the dose of a medication you were on and couldn't remember? Or the date of a heart exam from over a year ago? Maybe you needed to double check that your insurance is billing you the correct amount or you need more information for an appeal letter. Have you ever spent hours searching through stacks and stacks of paperwork looking for the one thing you can't seem to find? If so, it's time that you get organized. Here are two different ways to help. Find the perfect mix that works for you!

Physical

The huge amount of paperwork that comes along with your healthcare can be a challenge to manage. Some documents that are in paper form you can expect to store include:

- Hospital, doctor, and provider bills
- Insurance Explanation of Benefits forms
- Insurance denial letters and appeal forms
- Authorization statements from your doctor
- Pharmacy bills and other receipts
- Notes and recordings of conversations with health care professionals and insurance representatives

Here are some tips to help you file your physical papers:

Use a **paper file folder system.** These can be color-coded for different types of documents and labeled for quick reference.

File your paperwork by **care date.** It is a good idea to place your most recent records at the top or front of your folders so that they are the easiest to find.

Keep **detailed notes** of all your conversations with your insurance company or doctor's office. Be sure to write down the date and time of your call and the name of the person you spoke with. These notes can become important later.

Be sure to save the original (or make copies) of all your bills and payment receipts as well as lab reports and tests results. Generally, you want to keep billing records for at least the previous plan year and medical records for **five years.**

Set up a spot in your home for all of your medical files. It will be easier for you to file new bills, receipts, test results, and other important information if you always put them in the same place. Get in the habit of opening and **filing all new paperwork immediately.**

Digital

It is a good idea to have a set spot for all of your medical and insurance files. A great place to keep everything in one spot and easily accessible is in the digital world.

In addition to the bills and insurance documents, there is a lot of information that you will need to be quickly accessible, including:

- Family health history (including parents, siblings, and grandparents)
- Complete contact information for all the doctors, specialists, and treatment centers involved in your care
- A personal health history, including current conditions, how they are being treated, and how well they are being controlled
- Doctor visit summaries and notes
- Hospital discharge summaries
- Test results
- Medication names, dosage, and use
- Scanned copies of paper documents

This information, when made digital, can become easily accessible. Here are some tips to get you started:

Embrace technology! Computer spreadsheets like Microsoft Excel or Google Sheets, mobile apps, and patient portals can be used to keep track of appointments, test results, doctor notes, bills, account passwords, and so much more.

Use programs to **automatically scan** your paperwork into your computer. Be sure to save these files with a name that can be easily understood by anyone who might find them. Include the date of service in the file name.

Make sure that someone you trust has a list of your **digital accounts** and knows how to access them for you in the event that you are unable.

Be sure to **create secure backups** of all your digital information in case something happens to it. Computers can fail unexpectedly, be prepared!