



Care Coordination Master List

Put every appointment, referral, and unresolved question in one place. Update this sheet before calls and appointments so nothing depends on memory alone.

Use exact names, dates, and next steps. For every open item, write who is responsible and when you will follow up. “They are supposed to call us” is not a complete plan until you know who “they” are and when to call back.

Survivor _____

Date updated _____

Updated by _____

1. Appointments completed Record the decision and the next action before you move on.

Date	Provider / office	What was decided or ordered?	Next step + owner

2. Appointments scheduled Know why you are going and what you need to bring or ask.

Date / time	Provider / office	Purpose	What to bring / top question

3. Referrals still pending Do not leave a referral as a vague “someone will call.”

Referral / specialty	Referred by + date	Who owns scheduling / authorization?	Last follow-up + next date

4. Questions no provider has answered yet Assign each question to the person most likely to answer it.

Unanswered question	Who should answer it?	When will we ask / follow up?

