My Next Steps

For your own appointments or when helping someone you love. Write down administrative actions using the instructions your office provides.

Office / organization providing this sheet (optional)

1. What administrative step needs to happen?

Who do I contact? Office / phone / location

Who calls whom?

When will I check back?

2. What administrative step needs to happen?

Who do I contact? Office / phone / location

Who calls whom?

When will I check back?

What paperwork or administrative details should I confirm?

Who can help me keep track? (optional)

Mark each step: DONE / STILL WAITING / NEED CLARIFICATION. Ask the responsible office about unclear instructions. Do not use this sheet for symptoms, medical instructions or treatment decisions.

Keep your completed sheet private; do not return it to Alinea. Questions about our tools: Shonte@alineacaregroup.com. More organization pages: alineacaregroup.com/starter-kit ($9 Kit).