



# NAVIGATOR NOTES

Making Eldercare Easier



## Fax Sheet – Prior to Medical Visit (When you are not going to attend with your elder.)

Example

**Date:**

**To:** Name of Administrator  
Name of Doctor's Office/Medical Provider  
Fax XXX-XXX-XXXX

**From:** Your Name  
Contact Info

**Attached:** Medicare and Supplemental Insurance Cards for Name of Elder.

*Name of Elder has an appointment at your office on XX/XX. I am providing a copy of his/her medical cards ahead of the visit. Please place these copies in your files for my mother/father/elder.*

*If payment is required at the time of visit, please take via credit card. If they owe anything additional, please mail an invoice to: (put your address or your elder's address here).*

*Unfortunately, I won't be able to join my elder on this visit. However, I'd like to know what was discussed and what next steps are being recommended. Please fax or email an office visit summary to my attention after the visit.*

**Fax:** XXX-XXX-XXXX

**Email:**

*Your office has a copy of my Power of Attorney on file. (If they don't, fax that as well and tell them in this letter that you're sending it.) (If you don't have access to a fax number, you could ask them to email a copy of the visit summary to you.)*

Thank you,

*Sign and add something nice here!  
Add your phone number in case they need to call you.*

# Instructions for Fax Sheet – Prior to Medical Visit

(When you are not going to attend with your elder.)



1. This is useful when you need the provider to have a copy of your elder's Medicare and supplemental insurance cards, but you won't be there with your elder for the visit.
2. If your elder has memory issues and you won't be with them, this gives the provider's office a copy of the cards so that your elder doesn't have to take them along and risk losing them.
3. If the office already has a copy of your elder's cards and you've confirmed it, you may want to send this request for a visit summary to be sent to you after the visit. You can eliminate the card section of the fax.
4. This is helpful when your elder has a copay, but both your elder and the office staff usually forget to take the copay. This prevents the office from having to send you a bill afterwards.
5. You may want to slightly amend this letter if you need to send a copy of your Power of Attorney to the provider's office.
6. Handwriting something nice next to your signature is always a great way to thank the staff for taking the extra time to handle your request.

## NOTES

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