

PRIOR AUTHORIZATION SUPPORT WORKSHEET

Complete before your appointment and give to the staff handling authorization

Your organized information helps your provider submit a stronger, more complete request.

This guide is for informational purposes only and does not constitute legal, medical, or financial advice.

Patient & Request Information

| Patient Name | Medication / Procedure Requested | Condition Being Treated | Ordering Provider |
|--------------|----------------------------------|-------------------------|-------------------|
| | | | |

Symptoms

Check all that apply and describe the primary symptom affecting daily life:

| | | | |
|--|--|--|---|
| <input type="checkbox"/> Pain | <input type="checkbox"/> Swelling / inflammation | <input type="checkbox"/> Mobility limitation | <input type="checkbox"/> Urinary symptoms |
| <input type="checkbox"/> Respiratory symptoms | <input type="checkbox"/> Cardiac / circulation | <input type="checkbox"/> Reproductive / hormonal | <input type="checkbox"/> Frequent flare-ups |
| <input type="checkbox"/> Skin issues | <input type="checkbox"/> Sleep disruption | <input type="checkbox"/> Digestive issues | <input type="checkbox"/> Fatigue |
| <input type="checkbox"/> Neurological symptoms | <input type="checkbox"/> Weight-related conditions | <input type="checkbox"/> Other: _____ | |

Primary symptom most affecting daily life:

| Describe briefly |
|------------------|
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| |

Duration & Severity

| How long has this condition been present? | Current Severity | Functional Impact (check all that apply) |
|---|------------------|--|
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Prior Treatments Tried — CRITICAL for Step Therapy

This section is the most important part. Insurance companies routinely deny requests because prior treatment history is missing or undocumented. List every medication, therapy, or intervention already tried for this condition.

| Treatment / Medication | Approximate Dates | Dose / Duration | Outcome | Provider / Where Treated |
|------------------------|-------------------|-----------------|---------|--------------------------|
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Relevant Testing or Outside Records

| Test / Record Type | Approximate Date | Where Performed / Source | Key Finding or Result |
|--------------------|------------------|--------------------------|-----------------------|
| | | | |
| | | | |

Additional Notes for Provider

| Notes |
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Advisory sessions provide educational guidance only and do not constitute legal, medical, or insurance advice.