



# Keeping Organized on Your Cancer Journey

**Here's a simple, empowering tip for living with cancer:** getting your medical records organized is a small but powerful way to bring structure and calm into your daily life.

When you're juggling multiple doctors, specialists, tests, and treatments, things can pile up quickly. Having your information in one place may help your care team stay on the same page — and it may help you feel less overwhelmed by paperwork.

## BEING ORGANIZED PAYS OFF IN BIG WAYS

You'll have the right info at your fingertips for appointments, insurance claims, or emergencies.

If you ever change doctors, move, or travel, your records will travel with you.

And maybe best of all: it can feel empowering. Knowing your medical story inside and out helps you play an active role in your care.

That's why we've created this **simple seven-day plan** to help you organize your cancer paperwork. Consider focusing on one Microstep a day that focuses on a key area of health records management. Some may take a little extra time, but after completing each step you may be in a better place to navigate your cancer care.

## DAY ONE

### **Set up a filing system for your records.**

Pick a method that's portable and easy for you to use consistently. Some people like a sturdy notebook or a zippered binder with dividers. Others prefer a small portable file folder or box. If you're tech-comfortable, you can also go digital with a folder on your laptop or try the [Living with cancer app](#) — just make sure it's backed up and accessible. You may wish to grant a loved one access so they can access it and keep on top of it when you are not feeling up to it.

## DAY TWO

### **Sort your paperwork into matching categories.**

If you've got a stack of papers, don't overthink it — just start by making piles of what looks alike: doctor's instructions, explanations of benefits (EOBs), claims, and bills. Then go one step further and match related items — like pairing each bill with its corresponding EOB — to help ensure nothing gets lost or overlooked.

## DAY THREE

### **Keep copies of your medical imaging — not just the reports.**

It might seem easier to let your providers request scans directly from the hospital where they were done, but that process may sometimes take some time. Having your own copies may be useful.

## DAY FOUR

### **Make two master lists of providers and medications — and share them with your trusted care partner.**

Create one list with the names, specialties, and contact information of every doctor involved in your care, and another with all your medications, including names, doses, and schedules. Keep the lists in your binder or digital folder, and make sure you carry copies when you travel. Also give a copy to your trusted caregiver so they can step in and communicate on your behalf in case of an emergency.

## DAY FIVE

### **Take advantage of patient portals — but don't rely on them alone.**

Online access is convenient, but some portals may remove older records after a few years or only display partial information (like lab results but not full pathology reports). Printing or downloading key files helps ensure you have a permanent copy, even if a portal changes, closes, or you switch hospitals. Think of the portal as a tool for easy access, but your own file as your “forever backup.”

## DAY SIX

### **Create a secure system for storing your patient portal passwords and share it with a trusted caregiver.**

Write down your usernames and passwords in a small notebook or password log that you keep in a safe but accessible place, such as a locked drawer or fireproof box. If you prefer digital tools, use a password manager app that securely stores your logins and can be shared with a trusted caregiver if needed. Having your credentials organized may make it easier (or someone helping you) to quickly access your records in an emergency without delay or stress.

## DAY SEVEN

### **Pick a regular organizing time — such as once a week or at the end of each treatment cycle — to make sure your files are up to date.**

Set a calendar reminder or tie it to an existing appointment, like asking for copies when you schedule your next follow-up. It can get harder to access older files as time passes, so a simple routine prevents piles of paperwork from building up and can help avoid important items slipping through the cracks.

### **BONUS TIP**

### **If you're tech savvy, reduce paper use by scanning your documents into digital files.**

Use a secure cloud-based app to help you access your files anywhere and avoid losing them if your computer crashes. Create electronic folders that mirror your paper system — insurance, prescriptions, tests, procedures, lab work, and care team contacts — and drop each scanned document into the right spot as soon as you get it.