

Family binder: Margaret J. Ellison

Date of birth 03/14/1945. Prepared October 23, 2026. 11 pages from 6 files (1 scanned page(s) transcribed). Page numbers (p.) are pages of the combined pile, listed below.

Parent's own signed consent to this workspace on file: yes. Health care power of attorney on file: yes, held by Daniel Ellison (son).

Files: p.1 cardiology follow-up scan.pdf; p.2 heart doctor consult.pdf; pp.3-4 hospital discharge papers.pdf; p.5 lakeshore heart bill.pdf; pp.6-9 maple grove records.pdf; pp.10-11 medicare summary notice sept.pdf

Citation check: 0 item(s) need a human look; 5/5 timeline entries verified against their cited pages.

Needs a look

- Lists disagree: discharge summary p.4 says "Furosemide 40 mg, Take 1 tablet by mouth twice daily"; PCP list p.9 says "Furosemide 20 mg, 1 tablet by mouth once daily". Ask the prescriber.
- Lists disagree: discharge summary p.4 says "Potassium chloride ER 20 mEq, Take 1 tablet by mouth once daily"; PCP list p.9 does not list potassium chloride. Ask the prescriber.
- Medicare denied Hospital bed, semi-electric (Riverbend Home Medical Supply (fictional), 08/07/2026). Appeal (redetermination) deadline: January 21, 2027.
- The Lakeshore Heart Associates (fictional) bill p.5 asks for \$212.32 for 08/20/2026. The Medicare Summary Notice dated 09/18/2026 p.11 says the maximum you may be billed for that care is \$29.42. The bill is \$182.90 higher. A draft letter to the billing office is ready for review.
- p.8 is another patient's record (Marjorie A. Ellis); left out of this binder.

Timeline across providers

Date	Clinician / facility	What the record says	Pages
06/10/2026	Thomas Brandvold, MD Maple Grove Family Practice (Office visit - annual)	Annual visit for high blood pressure, high cholesterol, underactive thyroid. Tiredness, ankle swelling. Office EKG: new atrial fibrillation. Plan: cardiology referral, furosemide 20 mg daily started, follow up in 3 months.	p.6
07/15/2026	Anjali Rao, MD Lakeshore Heart Associates (New patient consultation (with echocardiogram))	Referred for irregular heartbeat. Tiredness, shortness of breath on stairs. Echo: EF 35-40%, moderate mitral regurgitation, enlarged left atrium. New atrial fibrillation and HFrEF. Started apixaban 2.5 mg twice daily; low-salt diet; return 6 weeks.	p.2
08/03/2026 to 08/06/2026	Samuel Ortega, MD Riverbend General Hospital (Hospital stay)	Admitted via ED for shortness of breath at rest and leg swelling. Acute on chronic HFrEF, atrial fibrillation rate controlled, low potassium corrected. IV furosemide, weight down 3.1 kg. Discharged home stable; hospital bed ordered.	pp.3, 4
08/20/2026	Anjali Rao, MD Lakeshore Heart Associates (Cardiology follow-up visit)	Post-hospital follow-up. Breathing better, mild ankle swelling. Weight 59.5 kg, BP 118/70. EKG: atrial fibrillation, rate 78. HFrEF improving. Continue discharge regimen, daily weights, repeat echo in 3 months, return 11/19/2026.	p.1
09/02/2026	Thomas Brandvold, MD Maple Grove Family Practice (Office visit - hospital follow-up)	Hospital follow-up. Feels better, weight 59.8 kg, BP 120/72, lungs clear, trace ankle swelling. HFrEF improving; atrial fibrillation on apixaban. Medication list reprinted. Recheck basic metabolic panel early November; return 3 months.	p.7

Medication lists side by side (no advice; questions go to the prescriber)

Prepared from documents you provided. Not medical or legal advice.

SAMPLE - FICTIONAL PERSON AND PROVIDERS

Flagged as questions for the prescriber, between complete lists only: a medicine missing from a complete list; a different dose or frequency. Other notes in the Check column describe the lists and are not flagged.

Medicine	discharge summary p.4 (08/06/2026)	PCP list p.9 (09/02/2026)	Check
furosemide	Furosemide 40 mg, Take 1 tablet by mouth twice daily	Furosemide 20 mg, 1 tablet by mouth once daily	Lists disagree: discharge summary p.4 says "Furosemide 40 mg, Take 1 tablet by mouth twice daily"; PCP list p.9 says "Furosemide 20 mg, 1 tablet by mouth once daily". Ask the prescriber.
potassium chloride	Potassium chloride ER 20 mEq, Take 1 tablet by mouth once daily	(not listed)	Lists disagree: discharge summary p.4 says "Potassium chloride ER 20 mEq, Take 1 tablet by mouth once daily"; PCP list p.9 does not list potassium chloride. Ask the prescriber.
apixaban	Apixaban 2.5 mg, Take 1 tablet by mouth twice daily	Eliquis 2.5 mg, 1 tablet by mouth twice a day	Lists agree
atorvastatin	Atorvastatin 40 mg, Take 1 tablet by mouth at bedtime	Lipitor 40 mg, 1 tablet by mouth at bedtime Atorvastatin 40 mg, 1 tablet by mouth daily	Listed twice on the PCP list p.9.
levothyroxine	Levothyroxine 50 mcg, Take 1 tablet by mouth every morning	Levothyroxine 50 mcg, 1 tablet by mouth daily before breakfast	Lists agree
lisinopril	Lisinopril 10 mg, Take 1 tablet by mouth once daily	Lisinopril 10 mg, 1 tablet by mouth daily	Lists agree
metoprolol succinate	Metoprolol succinate ER 25 mg, Take 1 tablet by mouth once daily	Toprol XL 25 mg, 1 tablet by mouth daily	Lists agree

Medicare and plan notices

Notice dated September 18, 2026 pp.10, 11. Presumed received September 23, 2026 (5 days after its date). Appeal (redetermination) deadline: January 21, 2027 (Thursday), 120 days after receipt. Source: CMS, First Level of Appeal: Redetermination by a Medicare Contractor.

Service date	Provider	Items	Approved?	Max you may be billed	Claim / pages
07/15/2026	Lakeshore Heart Associates (fictional), Anjali Rao MD	99204 New patient office visit; 93306 Echocardiogram, complete	Yes	\$78.65	26-19601-44810 p.11
08/07/2026	Riverbend Home Medical Supply (fictional)	E0260 Hospital bed, semi-electric	No	\$425.00	26-21933-07215 p.11
08/20/2026	Lakeshore Heart Associates (fictional), Anjali Rao MD	99214 Office visit, established; 93000 Electrocardiogram (EKG)	Yes	\$29.42	26-23408-11902 p.11
09/02/2026	Maple Grove Family Practice (fictional), Thomas Brandvold MD	99214 Office visit, established	Yes	\$26.18	26-24477-30018 p.11

Appeal facts (for the family's own appeal: no appeal letter or form is drafted here)

Claim number	26-21933-07215	p.11
Item or service	E0260 Hospital bed, semi-electric	p.11
Date of service	08/07/2026	p.11
Denial reason as printed	"(A) This item was denied because the information we received did not show that the equipment is medically necessary."	p.11

SAMPLE - FICTIONAL PERSON AND PROVIDERS

Notice	Medicare Summary Notice (Original Medicare), dated 09/18/2026	pp.10, 11
Appeal deadline	January 21, 2027 (Thursday): redetermination, 120 days after the notice is presumed received (09/23/2026, 5 days after its date). Rule: CMS, First Level of Appeal: Redetermination by a Medicare Contractor; 42 CFR 405.942(a). Weekends and holidays are not adjusted.	pp.10, 11
Deadline printed on the notice	none printed	pp.10, 11
How to file	Official form: Form CMS-20027, Medicare Redetermination Request Form (or follow the instructions on the notice): https://www.cms.gov/medicare/cms-forms/cms-forms/downloads/cms20027.pdf	pp.10, 11

Bills against the Medicare Summary Notice

Bill	Dates of service	Amount due	MSN maximum	Difference	Check
Lakeshore Heart Associates (fictional) p.5	08/20/2026	\$212.32	\$29.42	\$182.90	OVER the MSN maximum: draft letter ready

Other patients' pages

- p.8: Marjorie A. Ellis (Different patient name and date of birth (MRN MGF-SYN-20877); found by model and page labels). Not used anywhere in this binder.

Tasks (unassigned)

Who	What	By when	Pages
Unassigned	Ask the prescriber which furosemide dose is current (the discharge summary and PCP list give different doses).	October 30, 2026	pp.4, 9
Unassigned	Ask the prescriber whether potassium chloride belongs on the current list (on the discharge summary but not the PCP list).	October 30, 2026	pp.4, 9
Unassigned	Review the draft letter to the Lakeshore Heart Associates (fictional) billing office about the \$212.32 balance (MSN maximum \$29.42) and decide whether to send it.	October 31, 2026	pp.5, 11
Unassigned	Records say: "Recheck basic metabolic panel (early November 2026)" (Thomas Brandvold, MD). Book it or confirm it is booked.	November 2, 2026	p.7
Unassigned	Tell Maple Grove Family Practice that p.8 is another patient's record (Marjorie A. Ellis) and ask how they want it returned. It is left out of the binder.	November 6, 2026	p.8
Unassigned	Records say: "Cardiology return visit (Lakeshore Heart Associates)" (Anjali Rao, MD). Book it or confirm it is booked.	November 19, 2026	p.1
Unassigned	Records say: "Repeat echocardiogram" (Anjali Rao, MD). Book it or confirm it is booked.	November 20, 2026	p.1
Unassigned	Records say: "Primary care return visit (Maple Grove Family Practice)" (Thomas Brandvold, MD). Book it or confirm it is booked.	December 2, 2026	p.7
Unassigned	Decide whether to appeal the denied claim for E0260 Hospital bed, semi-electric (Riverbend Home Medical Supply (fictional), 08/07/2026). A redetermination request must be filed by January 21, 2027: 120 days after the notice dated 09/18/2026 is presumed received (09/23/2026).	January 21, 2027	p.11