

5 My Insurance Discussion Record

Financial and insurance issues can be stressful and confusing for you and your caregivers. It is important to create an organized system for managing this aspect of cancer care. By educating yourself about insurance benefits and keeping organized financial records, you may prevent financial dilemmas and, as a result, unnecessary stress.

This section of your By My Side™ journal provides a place to keep a record of phone discussions with your insurance provider. Use the next few pages to record each call—date; the insurance representative’s name, title, and phone number; and specific information from the call in the “Notes” column.

Consult your By My Side™ binder for practical tips about managing general insurance issues, a glossary of common insurance terms, and information about medical costs and tax issues. The “Understanding Insurance and Tax Issues” section of your binder also provides a place to store insurance-related documents.

Some patients find it helpful to designate a caregiver or family member to keep track of all insurance and financial information.

Sample Insurance Discussion Record Entry

Date	Insurance Representative Name/Title/Phone Number	Notes
12/30	Jane Doe, Customer Service Rep., 800-111-2222	Asked if I would be fully covered for all my chemotherapy drugs. Yes!

