
INSURANCE DISCUSSION RECORD

Insurance and Financial Information

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 worksheet provides a place to keep a record of phone discussions with your insurance provider. Use the next few pages to record each call and date; the insurance representative's name, title, and phone number; and specific information from the call in the "Notes" column.

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

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Date	Insurance Representative Name/Title/Phone Number	Notes