



Financial and Insurance Information

Items you may wish to include in this section of your binder:

- Copy of consent for release of information
- Explanation of benefits (EOB)
- Phone log of calls with the insurance company
- Copy of financial assistance applications
- Insurance policy coverage information
- Bills for services and equipment
- Copies of payments made
- Copy of most recent tax statement



Telephone Call Record

Date of call: _____ Individual with whom you spoke: _____
Phone number: _____ Institution/Location: _____
Reason for call: _____ Notes and follow-up: _____

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