INSURANCE COMPANY CALL TRACKING WORKSHEET

The Law Offices of
JONATHAN M. FEIGENBAUM
ERISA | Health | Life | Disability | Insurance

Remember to take careful notes during every phone call with the insurance company when discussing your claim. This information will help you or your attorney build your case, enable you to brief the next customer service agent and help you move the appeal process forward.

Name	Company	Job Title	Company ID	Phone Number	Date of Call	Time of Call	Conversation Notes	Next Steps	Document Image # (If appeal submitted)