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Tips for Organizing Financial Information [1]

This section has been reviewed and approved by the [Cancer.Net Editorial Board \[2\]](#), 06/2015

After a cancer diagnosis, many people find that becoming well organized helps them gain a sense of control over all the information they receive, including finances. The following suggestions may help as you start to track your costs and set up a personal system of organization.

Create a filing system that works for you. Find information quickly and easily by using a filing cabinet or simple desktop divider with individual folders. This system also helps keep important information in one place. File new information as soon as possible, so it doesn't get misplaced. Your files may include:

- Notes made during doctors' appointments
- Copies of your laboratory test results
- Your insurance information
- Contact information for your doctor's office, medical center, insurance company, support organizations, and others
- Bills

- Explanations of benefits (EOB) materials that describe what benefits your health insurance paid for each service
- Receipts for health care expenses

Use technology as an organizational tool. Some people prefer to use a computer to keep track of important information. Creating a spreadsheet with columns for the appointment date, doctor's name, amount paid, status of the insurance claim, and other important notes can help you quickly see the status of payments for medical services. It is also possible to track financial information related to your cancer care online or using an app.

Request a case manager. Ask your health insurance company if you can have a case manager. This way you can talk with the same person each time you need to call. Keep current copies of all insurance policies and refer to them by name and number in any communications about insurance coverage.

Take good notes. Maintain a written record of all conversations you have with an insurance company representative, including the date, name of the person you spoke with, and what was said. Put the newest records at the front of your file so you have a clear and up-to-date list of these discussions.

Keep track of all unreimbursed medical expenses. This information may include the dates of each service, the amount paid, and the name of the provider. You may be able to claim these expenses for tax purposes. (A tax professional can provide advice on current rules and eligible expenses.)

Plan for changes in income and expenses. Try to decide ahead of time how to adjust your budget to deal with any loss of income because of less time at work or expenses not covered by insurance.

Ask for help. A trusted friend or family member is a great resource if you need help keeping track of your regular monthly bills. You might also want to consider using a bill-paying service to ensure payments are made on time.

More Information

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Links

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[2] <http://www.cancer.net/about-us>

[3] <http://www.cancer.net/node/25015>

[4] <http://www.cancer.net/node/24569>

[5] <http://www.cancer.net/node/24922>

[6] <http://www.cancer.net/node/24920>