

Insurance conversation log

Keep a record of calls, emails and portal messages. Print another copy for more entries.

Name / household

Claim number (if assigned)

Confirm the contact using your policy or insurer website before sharing claim information.

CONVERSATION 1

Date / time / channel

Representative / role / verified contact

Questions asked / answers received / documents or policy sections discussed

Next action / who is responsible

Due date / reference ID

CONVERSATION 2

Date / time / channel

Representative / role / verified contact

Questions asked / answers received / documents or policy sections discussed

Next action / who is responsible

Due date / reference ID

Useful questions: What documents are needed? Is an inspection required? Which deductible and limits apply? What is the next step, who handles it, and when should I follow up?

Ask for important decisions and instructions in writing; keep copies with this log.

Keep completed worksheets private. Share through your insurer's verified secure channel.

An organizing aid. Your policy and insurer determine coverage and claim requirements.

rapiddry.net/water-damage-insurance-guide/ | Office: 254-218-3757