Call Log

Calls, emails, letters, and portal messages. Write down names and reference numbers while they are fresh. Use "Next step recorded" to capture anything that needs checking later.

Date _____ **Time** _____ **Method** ☐ Phone ☐ Email ☐ Portal ☐ Letter ☐ Other

Organization _____ **Person contacted** _____

Reason for contact _____ **Reference or confirmation no.** _____

What was said

_____

_____

_____

Next step recorded

_____

_____

Date _____ **Time** _____ **Method** ☐ Phone ☐ Email ☐ Portal ☐ Letter ☐ Other

Organization _____ **Person contacted** _____

Reason for contact _____ **Reference or confirmation no.** _____

What was said

_____

_____

_____

Next step recorded

_____

_____

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An organizational tool. Not legal, medical, tax, financial, or insurance advice. Your policy and carrier are the authority on your claim.