# My Contact and Follow-Up Record

Case summary. Add a contact log page for each call, chat, or email.

Use one record for each issue. Keep the summary first, then place a log page behind it for every helper or representative you contact. Four contact pages are included; print extra copies if you need more.

**This record may contain sensitive account details. Store it securely. Never record passwords, PINs, or one-time security codes. Share account details only with an organization you reached through a contact method you verified.**

**Date and time this issue began**

**Organization or service**

**Account type or matter label**

**Full account number or identifier, if needed**

**What happened? Include payment details if relevant.**

**What information was requested, used, or shared?**

**What do I need to know, correct, or have happen next?**

**Current status**

- [ ] Not sent
- [ ] Pending
- [ ] Partly resolved
- [ ] Resolved
- [ ] Still unclear

**Where related messages and documents are saved**

When the issue is resolved, clear or cover the account number if you no longer need it. If follow-up or repeat sign-ins are likely, keep the record secure and accessible.

# My Contact and Follow-Up Record

Contact log 1. Use one page for each helper or representative.

**Account type, organization, or matter label**

**Date and time**

**Contact method and number or address used**

**Organization and helper name, title, or department**

**Case, ticket, confirmation, or reference number**

**Call or contact duration, if useful**

**What I asked and why I contacted them**

**What information they said they used or requested**

**What they told me. Note who said it and any explanation they gave.**

**Promised next step: who will do what, and by when?**

**Follow-up date or deadline**

**Additional notes**

# My Contact and Follow-Up Record

Contact log 2. Use one page for each helper or representative.

**Account type, organization, or matter label**

**Date and time**

**Contact method and number or address used**

**Organization and helper name, title, or department**

**Case, ticket, confirmation, or reference number**

**Call or contact duration, if useful**

**What I asked and why I contacted them**

**What information they said they used or requested**

**What they told me. Note who said it and any explanation they gave.**

**Promised next step: who will do what, and by when?**

**Follow-up date or deadline**

**Additional notes**

# My Contact and Follow-Up Record

Contact log 3. Use one page for each helper or representative.

**Account type, organization, or matter label**

**Date and time**

**Contact method and number or address used**

**Organization and helper name, title, or department**

**Case, ticket, confirmation, or reference number**

**Call or contact duration, if useful**

**What I asked and why I contacted them**

**What information they said they used or requested**

**What they told me. Note who said it and any explanation they gave.**

**Promised next step: who will do what, and by when?**

**Follow-up date or deadline**

**Additional notes**

# My Contact and Follow-Up Record

Contact log 4. Use one page for each helper or representative.

**Account type, organization, or matter label**

**Date and time**

**Contact method and number or address used**

**Organization and helper name, title, or department**

**Case, ticket, confirmation, or reference number**

**Call or contact duration, if useful**

**What I asked and why I contacted them**

**What information they said they used or requested**

**What they told me. Note who said it and any explanation they gave.**

**Promised next step: who will do what, and by when?**

**Follow-up date or deadline**

**Additional notes**