Communications Log/Running Record Template

A communications log – or running record – helps you keep track of all conversations, actions and other activities related to a case.

Use this template to track your activity on a case. Every time you initiate or receive communication, and every time you perform an action related to a case, put it on this log. This will help you track events as they occur, plan for timely follow up, and provide you with a case history, which will help you when you write an adverse decision letter.

COMMUNICATIONS LOG/RUNNING RECORD			
Customer Name **Case ID**			
Telephone(s):		**Email:**	
Date	**Type of Meeting/Action** (phone, in-person, other)	**Summary** (Details of the activity)	**Followup Required** (date, action)