

Investigation Notes

Beneficiary Name: _____ Date: _____

Spoke to person with knowledge of situation

Name:

Contact information:

Connection to matter:

Left message for person with knowledge of situation

Name:

Time of message:

Summary of message content:

Conducted site visit

Site visited:

Address:

Other

Summary of activity, action taken or conversation in support of the investigation:

Name of investigator: _____

Signature or initials: _____