

“Stay On Top of It” Communication Log

It is important to keep track of all your conversations with your servicer and housing counselor. It is also very important to keep track of all the people working with you including their phone numbers, important dates and action steps. Below is a sample of the kinds of entries to make in your log. Attached to the log should be all of your documents including letters, loans and notices.

- Who did I talk to? When?
- What was discussed?
- What is their phone number?
- Their address?
- When will they call back?
- When am I supposed to call back?
- What notice did I receive and from whom?

Notes for “Stay On Top of It” Log - Sample -

Date	Name Ph. Number	Notes about our conversation Call Back (CB), Left Message (LM)
01/10/20xx	1-888-243-6666	Spoke with Katie @ Wilshire who requested a Hardship Letter from me. Fax to her @ 1-888-222-0000, then she will CB. If I don't hear from her by 1/15/20xx, I will call her.
1/11/20xx		Sent Hardship Letter by Fax to Katie.
1/15/20xx	1-888-243-6666	LM with Katie to verify she received fax/hardship letter.
1/19/20xx		Katie called. Received letter. Now reviewing our file with her manager to decide next step. She will CB next week. Mark calendar to call Katie on 1/26/20xx if she has not called me.
1/27/20xx	1-888-243-6666	LM for Katie who has not called as promised. Asked her to call back.
1/28/20xx	1-888-456-7777	Marlon from National called to say their company took over our loan and that he will be my new contact. He has our hardship letter and will discuss with his manager next steps and promised to call back on Monday, Feb. 1 st .

