Documentation Flow

Servicing Director

Servicing

Documentation Flow

1. **Contact Made**: Checked if **actual** contact was made with customer.

2. **Outcome**: Results of inbound/outbound call.
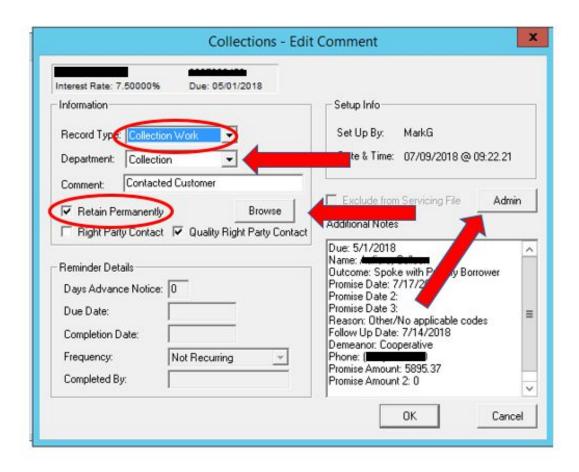
3. **Reason**: Reason for Default.

Note: RFD should be obtained on every in/out bound call during default.

4. **Demeanor**: Was customer cooperative or uncooperative

5. **Promise Date** (1-3) and **Promise Amt** (1-3) also be set up for Promise to Pay and should be utilized when arrangements are made. **(If Applicable)**

6. **Follow Up:** allows for setting a follow up date based on arrangement **(If Applicable)**
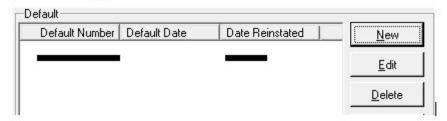
Click Add Comments

Documentation Flow

1. **Record Type**: Select Comments

2. **Department:** Select appropriate department (customer service = servicing)

3. **Comments:** click **Browse** button to select appropriate canned comment.

4. **Rights Party Contact**: check if contact with borrower/co-borrower/authorized 3rd party

5. **Quality Right Party Contact**: check if contact with borrower/co-borrower/authorized 3rd party and resulted in positive resolution (example: payment arrangement or pay by phone).
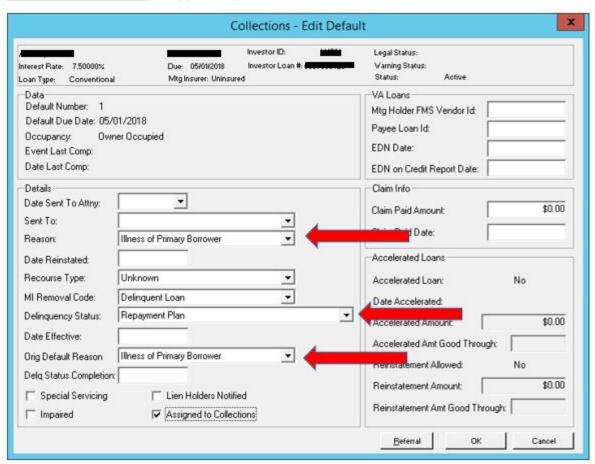
NOTE: **Retain Permanently** should always remain checked.

NOTE: **Admin button** should *NOT* be utilized at any time as all comments must be recorded permanently on system of recorded, which are subject to audit.

Documentation Flow

Click Default (6)

Click New/Edit/Delete (As Applicable)

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1. Reason: Default Reason (should reflect same reason used Collection – Contact screen)

2. Original Default Reason: Appropriate Default Reason (Single Family Default Monitoring System = standard SFDMS reporting codes) which should reflect the **ROOT** reason for default.

3. Delinquency: Select **None** (Late Stage Default statuses related to 60+/LM/BK/FC departments)

Welcome Call Process

Comments For Loan: ███████████

Setup By Comment	Date and Time Additional Notes
███████ Account Updated	7/26/2018 11:00:41AM Due: 6/1/2018 N██████████████ Outcome: Number Busy Promise Date: Promise Date 2: Promise Date 3: Reason: Unable to Contact Borrower Follow Up Date: Demeanor: Cooperative Pho██████████████ Promise Amount 0 Promise Amount2: 0 Promise Amount3: 0
███████ Welcome Call 3rd Attempt	7/26/2018 11:00:36AM
███████ Account Updated	7/26/2018 10:59:45AM Due: 6/1/2018 Na█████████████ Outcome: No Answer Promise Date: Promise Date 2: Promise Date 3: Reason: Unable to Contact Borrower Follow Up Date: Demeanor: Cooperative Pho██████████████ Promise Amount 0 Promise Amount2: 0 Promise Amount3: 0
███████ Welcome Call 2nd Attempt	7/26/2018 10:59:44AM
MarkG Account Updated	7/26/2018 10:58:21AM Due: 6/1/2018 N██████████████ Outcome: Left Msg VM Promise Date: Promise Date 2: Promise Date 3: Reason: Unable to Contact Borrower Follow Up Date: Demeanor: Cooperative Pho██████████████ Promise Amount 0 Promise Amount2: 0 Promise Amount3: 0
███████ Welcome Call 1st Attempt	7/26/2018 10:58:14AM

Contacted Customer

7/26/2018 11:05:43AM
Due: 6/1/2018
Na▓▓▓▓▓▓▓
Outcome: TT Primary Brw
Promise Date:
Promise Date 2:
Promise Date 3:
Reason: Unable to Contact Borrower
Follow Up Date:
Demeanor: Cooperative
Ph▓▓▓▓▓▓▓▓▓
Promise Amount 0
Promise Amount2: 0
Promise Amount3: 0

Welcome Call Completed

7/26/2018 11:05:29AM
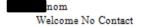TEST - Validated All Info

1. **Outcome**: Results of inbound/outbound call

2. **Record Type**: Select Comments

3. **Department:** Select Servicing

4. **Comments:** click **Browse** button to select from Welcome Call series (as applicable).

5. **Rights Party Contact**: check if made contact with borrower/co-borrower/authorized 3rd party

nom
Welcome No Contact

7/3/2018 9:03:31AM
welcomenocontact.rpt - Welcome No Contact
Printed

658616

Collection – Contact screen: click **Letter** button, select **Welcome No Contact**. This is a system generated letter and will automatically document Servicing Director.

Note: A 5 business Day timeframe will be allotted for completion of Welcome Call process.

NOTES