

## **Sample Communications Log/Running Record**

Because of the detail required to produce a thorough and sound adverse decision determination, you should make it a habit to keep a log of every phone call, every meeting, and every action taken. You don't know when you'll need a piece of information, a date on which a conversation took place, or a summary of the steps you took, but this log will be a helpful repository of those details.

So, rather than relying on your memory, document anything and everything related to a case or application. Doing so will enable you to communicate confidently based on events and actions as they actually occurred, and will make the process of putting your adverse decision in writing far more efficient.

Every time you initiate or receive communication, and every time you perform an action related to a case, write it down. 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.

Refer to the sample in this job aid for guidance on the level of detail you may want in your log.

**COMMUNICATIONSLOG/RUNNING RECORD**

**Customer Name:** *William Rancher*  
**Case ID** 12345

**Telephone(s):**  
*(222) 333-4444*

**Email:** *No Internet*

| <b>Date</b>    | <b>Type of Meeting/Action</b><br>(phone, in-person, other) | <b>Summary</b><br>(Details of the activity)  | <b>Followup Required</b><br>(date, action)                        |
|----------------|--|--|---|
| <i>5/2/12</i>  | <i>Walk-in</i>   | <i>Met Mr. Rancher. He asked about the Crop Disaster program; said he lost half of his sweet pea crop in 4 of 5 units. Gave him the information and application.</i>   | <i>Call in 1 week (5/9/12) to check status</i>                    |
| <i>5/3/12</i>  | <i>Phone</i>   | <i>Bill called with questions about documentation. Doesn't know if he can get it in time. Said he had 3 weeks to pull it all together.</i>   | <i>Call 5/9/12</i>  |
| <i>5/5/12</i>  | <i>Phone</i>   | <i>Bill called. Thinks he has everything. Wants me to review it. Scheduled meeting for tomorrow at 10 a.m.</i>   | <i>Meeting scheduled for 5/6, 10 a.m.</i>                         |
| <i>5/6/12</i>  | <i>Meeting</i>   | <i>Reviewed application and documentation. Bill still missing pertinent data. Data he presented doesn't seem to indicate as great a loss. Advised on additional documentation needed.</i>  | <i>Call 5/11/12 if no word from Bill</i>                          |
| <i>5/10/12</i> | <i>Meeting; unscheduled</i>                                | <i>Bill dropped by at noon with more paperwork. Wanted an immediate review and approval. Told him I'd review and let him know how things look by 5/12</i>  | <i>Review 5/11 and call Bill by 5/12</i>                          |
| <i>5/11/12</i> | <i>Phone call</i>  | <i>Called at 4:35 p.m. Losses do not qualify for this program. Bill upset. Scheduled meeting for 5/12</i>  | <i>Meeting at 9 a.m. on 5/12</i>                                  |
| <i>5/12/12</i> | <i>Meeting</i>   | <i>Bill visibly upset. Walked through the adverse determination, showing Bill that the data show clearly that losses were at approx. 25% overall; program requires &gt;35%. Advised on possible next steps. Said he would get my adverse decision in writing. Bill left disappointed but understood the reality.</i> | <i>Write adverse decision letter for review and distribution.</i> |