

## USING ESCALATION LOG IN PORTAL

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Escalation Log is intended for questions, clarification and/or a re-work on a loan or it's conditions.

1. Login to Client Portal
2. Click on Reports Menu, search for the Loan using the Search feature by Loan Number or Last Name

### Reports Menu

Search by Loan Number...

☒ Loan Number  
☐ Last Name

Search

3. Click the Escalation Log button at the top of the page

### Loan Information

Export To  
Excel

Notice of Loan Approval  
Report

Conversation  
Log

Escalation  
Log

Notice of  
COC

**4. Select the appropriate of Escalation from the drop down**

***NOTE: Do not Select Informational, as this is only for Notes and not an Escalation***

- Enter your escalation comment
- Click Add New Escalation Tab

The screenshot shows a web form titled "NEW ESCALATION" with a blue header. Below the header, there are two radio buttons for "Viewing Permissions": "All Users" (selected) and "Internal Only". Below this is a "Type:" label followed by a dropdown menu currently showing "Informational". Underneath is a section titled "Escalation Description" with a text area containing the placeholder text "Please enter your escalation comment here.". At the bottom of the form is a dark grey bar with a yellow button labeled "Add New Escalation".