Client	#	
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## REHABILITATION TRACKING SHEET

Homeowner:				
Address:				
Telephone: Home ( )		)		
Initial Application/Inquiry Date:				
PRESETTLEMENT ACTIVITIES				
Activity Description	Date Requested	Date Received/ Completed	Comments	
Preliminary Application				
Full Application				
Credit Report(s)				
Verification of Income/Employment				
Verification of Mortgage(s) or Deed of Trust for Each Lien Secured by Property				
Verification of Deposits				
Verification of Public Assistance				
Verification of Other Assets				
Mortgage Lender's Most Recent Year-End Statement				
Proof That Real Estate Taxes Are Paid and Current				
Title Evidence				
Appraisal				
Lead-Paint Notification				
Work Write-Up/Cost Estimates				
State Historic Review (If Applicable)				
Borrower's Review/Approval of Work Write-Up				
Loan Approval/Disapproval				
Bid Proposal(s) from Contractor				
Owner Review of Proposals/Rehab Specialist Review of Proposals				
Contractor Selection				
Contract Signing				
Right of Recission				

Client #			
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CONSTRUCTION AND CLOSE-OUT				
Activity Description	Date Complete or Sent	ed	Comments	
Pre-Construction Conference				
Notice to Proceed				
Request for Progress Payments				
Request #1				
Request #2				
Change Orders				
#1				
#2				
Certification of Final Inspection				
Request for Final Payment				
Notice of Completion				
Contractor's Release of Liens/ Warranties				
Disposition of Funds Statement				
LOAN SETTLEMENT				
Activity Description	Date Requested	Date Received/ Completed	Comments	
Truth-in-Lending Disclosure Statement				
Notice of Right-to-Cancel				
Promissory Note				
Mortgage or Deed of Trust				
Hazard Insurance, Taxes, Special Assessments				
Supplemental Financing Agreement				
Repayment Schedule				
Record Mortgage, Deed of Trust, or Promissory Note				