## Process Flow of Lender Production Temporary Task Reassignment

**Step 1:** Login With Lender Account Manager or Backup Account Manager, the lender prod Task Reassignment is available for only LAM & BAM.

**Step 2:** Login to your account and go to the Production Tab, there you will find the Lender Temporary Task Reassignment Link. Please refer to the screen shot.

**Note:** Names & FHA Numbers have been redacted from the screenshots.



Step 3: Click on Lender Temporary Task Reassignment link, and you will find the below screen.

	232 Healthcare Portal		Version 3.0 Log Welcome Backup Account Mana
re • Tasks(24) •	Group Tasks 👻 Financial Analysis 👻 Asset Management 👻	Production • Administration • Holp Dask •	
	Lender Users	Select Lender Llaer •	
	Production Type:	Select Production Type -	
	Project Loan Type:	Select Project Loan Type -	
	From Date:	To Date: Search	

**Step 4:** Select Lender user (drop down list) and select any user in the drop down list and click on search button. This will bring up a list of all the transactions associated to that user.

Lend	der Users:		•			
Proc	luction Type:		Select Production Type -			
Proj	ect Loan Type:		Select Project Loan Type -			
From	n Date:		To Date: Sea	ch		
Reassign	1 Task Grid					0
	TaskName	Date Submited	Loan Type	Processed By	Status	Age of Task
			Production Type: APPLICATIO	N REQUEST		
	FC Request (035- Purchase/Refinance 223(f)	05/01/2020 07:19 AM	Purchase/Refinance 223(f)		Request	5
	Refinance 223(a)(7)	03/07/2020 10:10 AM	Refinance 223(a)(7)		InProcess	60
RAI	Refinance 223(a)(7)	04/02/2020 11:31 PM	Refinance 223(a)(7)		Project Action Additional Information	33
	Purchase/Refinance 223(f)	02/13/2020 08:11 AM	Purchase/Refinance 223(f)		InProcess	83
RAI	Purchase/Refinance	05/01/2020 05:07 AM	Purchase/Refinance 223(f)		Project Action Additional Information	5
	urchase/Refinance 223(f)	04/09/2020 05:58 AM	Purchase/Refinance 223(f)		InQueue	27
	urchase/Refinance 223(f)	04/25/2020 05:52 AM	Purchase/Refinance 223(f)		InQueue	11
	Purchase/Refinance 223(f)	03/13/2020 03:43 AM	Purchase/Refinance 223(f)		InProcess	54
	FC Request (071- burchase/Refinance 222/6	05/01/2020 07:18 AM	Purchase/Refinance 223(f)		Request	5
	urchase/Remiance 225(1)		Production Type: CLOSING TWO	STAGE INITIAL		
	Construction 241(a)	03/14/2020 12:36 AM	Construction 241(a)		InQueue	53
					re ce Pag	e 1 of 2 +> ++ 10
Assig	n To:		Select Lender User *			

**Step 5:** Select any task in the grid and click the checkbox to the left of the selection as seen in the screenshot below:

Pro	oject Loan Type: om Date:		Select Project Loan Type - To Date:	earch		
Reassi	gn Task Grid			]		0
	TaskName	Date Submited	Loan Type	Processed By	Status	Age of Task
			Production Type: APPLICA	TION REQUEST		
	FC Request (035- Purchase/Refinance 223(f)	05/01/2020 07:19 AM	Purchase/Refinance 223(f)		Request	5
1	Refinance 223(a)(7)	03/07/2020 10:10 AM	Refinance 223(a)(7)		InProcess	60
RA	Al Refinance 223(a)(7)	04/02/2020 11:31 PM	Refinance 223(a)(7)		Project Action Additional Information	33
	Purchase/Refinance 223(f)	02/13/2020 08:11 AM	Purchase/Refinance 223(f)		InProcess	83
R4	Al Purchase/Refinance	05/01/2020 05:07 AM	Purchase/Refinance 223(f)		Project Action Additional Information	5
	Purchase/Refinance 223(f)	04/09/2020 06:58 AM	Purchase/Refinance 223(f)		InQueue	27
	Purchase/Refinance 223(f)	04/25/2020 05:52 AM	Purchase/Refinance 223(f)		InQueue	11
	Purchase/Refinance 223(f)	03/13/2020 03:43 AM	Purchase/Refinance 223(f)		InProcess	54
	FC Request (071- Purchase/Refinance 223(f)	05/01/2020 07:18 AM	Purchase/Refinance 223(f)		Request	5
			Production Type: CLOSING TV	O STAGE INITIAL		
	Construction 241(a)	03/14/2020 12:36 AM	Construction 241(a)		InQueue	53
					re ce Pag	e 1 of 2 🏎 🖬 10
Ass	ign To:		Select Lender User *			

**Step 6:** Now you must select a particular user to assign the task to (located below the grid is the 'Assign to' menu with drop down list, see screen shot)

Lend	er Users:							
Prod	uction Type:		Select Production Type -					
Desis	et Leon Trees							
Proje	ct Loan Type:		Select Project Loan Type -					
From	Date:		To Date: Sea	rch				
Reassign	Task Grid					0		
	TaskName	Date Submited	Loan Type	Processed By	Status	Age of Task		
			Production Type: APPLICATIO	ON REQUEST				
	FC Request (035- Purchase/Refinance 223(f)	05/01/2020 07:19 AM	Purchase/Refinance 223(f)		Request	5		
•	Refinance 223(a)(7)	03/07/2020 10:10 AM	Refinance 223(a)(7)		InProcess	60		
RAI	Refinance 223(a)(7)	04/02/2020 11:31 PM	Refinance 223(a)(7)		Project Action Addtional Information Request	33		
	Purchase/Refinance 223(f)	02/13/2020 08:11 AM	Purchase/Refinance 223(f)		InProcess	83		
RAI	Purchase/Refinance 223(f)	05/01/2020 05:07 AM	Purchase/Refinance 223(f)		Project Action Additonal Information Request	5		
	Purchase/Refinance 223(f)	04/09/2020 06:58 AM	Purchase/Refinance 223(f)		InQueue	27		
	Purchase/Refinance 223(f)	04/25/2020 05:52 AM	Purchase/Refinance 223(f)		InQueue	11		
	Purchase/Refinance 223(f)	03/13/2020 03:43 AM	Purchase/Refinance 223(f)		InProcess	54		
	FC Request (071- Purchase/Refinance 223(f)	05/01/2020 07:18 AM	Purchase/Refinance 223(f)		Request	5		
			Production Type: CLOSING TWO	STAGE INITIAL				
	Construction 241(a)	03/14/2020 12:36 AM	Construction 241(a)		InQueue	53		
					Ia da Pas	ge 1 of 2 🕨 🖬 10		

**Step 7:** Once you have made your selection, click the 'Reassign' button. After the process has been completed the system will display a pop-up message reading "Task Reassigned Successfully". See screen shot.

		www.pslsolutions.net says	
	232 Healthcare Portal	Tasks Reassigned Successfully	
	Group Tasks 👻 Financial Analysis 👻 Asset Management 👻 Produ	ction -	
	Lender Users:		
	Lender Users:		
	Lender Users: Production Type:	Select Production Type +	

**Step 8:** After reassigning the task, it will disappear from the grid and become available for the reassigned user. The reassigned user can access their new task from their "My Production Tasks" tab. Please see screen shot.

Home > Tasks > My Productio	n Tasks						
Pro Search Filters:	ect Name	Prodi	uction Type	FHA Number	Searc	Reset	
Production My Task							
Task Name	Project Name	Status Le	ander Type	Assigned To	Last updated	Comments Duration	Ready for Application
			Production Type: APPLIC	CATION REQUEST			
Refinance 223(a)(7)		II BERKADIA MORT	GAGE LLC REQUEST	N abby.d.hugill@hud.gov	03/07/2020	60 Days	

**Note:** If you want clarification regarding if the task is reassigned or not, from above the grid on the task reassignment page, you will find the select Lender user (drop down list) and select the reassigned user and search, please refer to the screen shot. You will then see the newly reassigned task.

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+ Tasks(24) + G	roup Tasks - Financial Analysis - Asset Mana	gement - Production -	Administration - Help Desk				
	Lender Users: Production Type: Project Loan Type: From Date:	0	• Select Production Type • Select Project Loan Type • To Date:	Search			_
	TaskName	Date Submited	Loan Type	Processed By	Status	Age of Task	
	all Patrone Station	03/07/2020 10:10 44	E Production Type: APP	LICATION REQUEST	Influences		
	(E) REMAINS 223(807)	03/07/2020 10:10 88	Nermanice 22 Status		in case P	age 1 of 1 ++ + 10 •	
	Assign To:		Select Lender User *				
	ReAssign						

**Note:** The following email confirmation will be sent to both parties upon Task Reassignment. See below:

Subject: Task Re-Assignment, (<u>0XX-XXXXX</u>) Refinance 223(a)(7).

Message Body:

## \*\*\*\* PLEASE DO NOT REPLY TO THIS EMAIL. THIS EMAIL ACCOUNT IS AUTOMATED AND NOT REGULARLY MONITORED BY STAFF \*\*\*\*

The task on APPLICATION REQUEST for Sanctuary at XXXXX, FHA Number – <u>0XX-XXXXX</u> has been reassigned from Jon Doe to Jane Doe on 05/07/2020. Jane Doe (<u>0XX-XXXX</u>)Refinance 223(a)(7) please check your My Production Tasks for further details.