

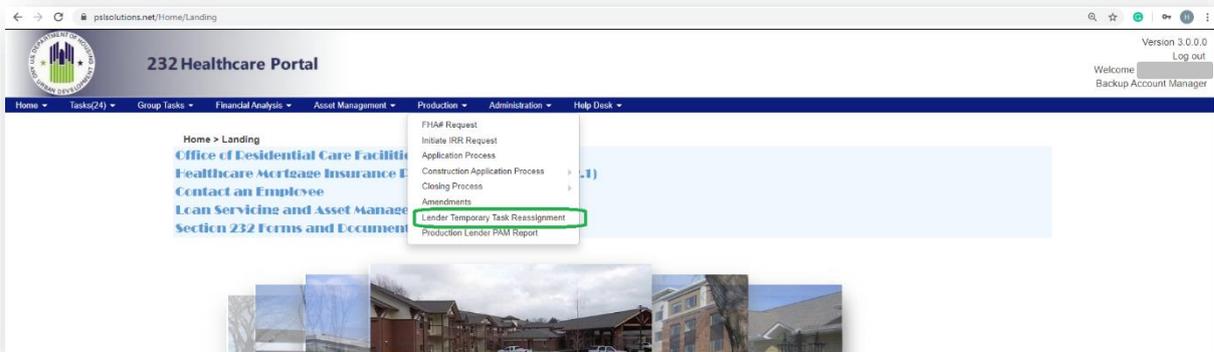
Lender Production Temporary Task Reassignment | 2020

Process Flow of Lender Production Temporary Task Reassignment

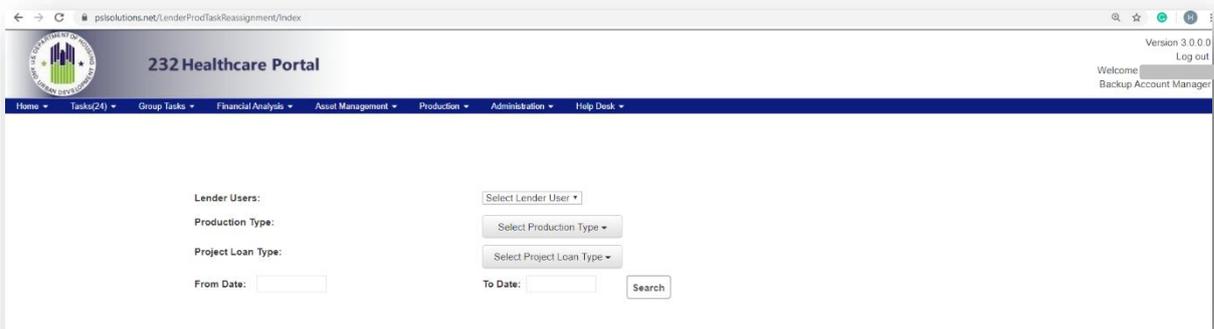
Step 1: Login With Lender Account Manager or Backup Account Manager, the lender prod Task Reassignment is available for only LAM & BAM.

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.



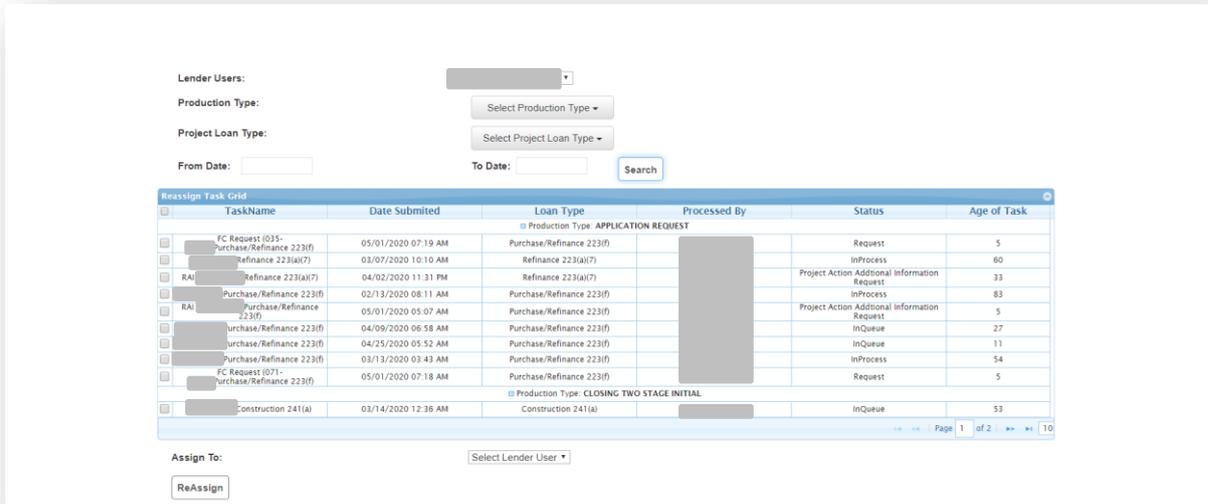
Step 3: Click on Lender Temporary Task Reassignment link, and you will find the below screen.



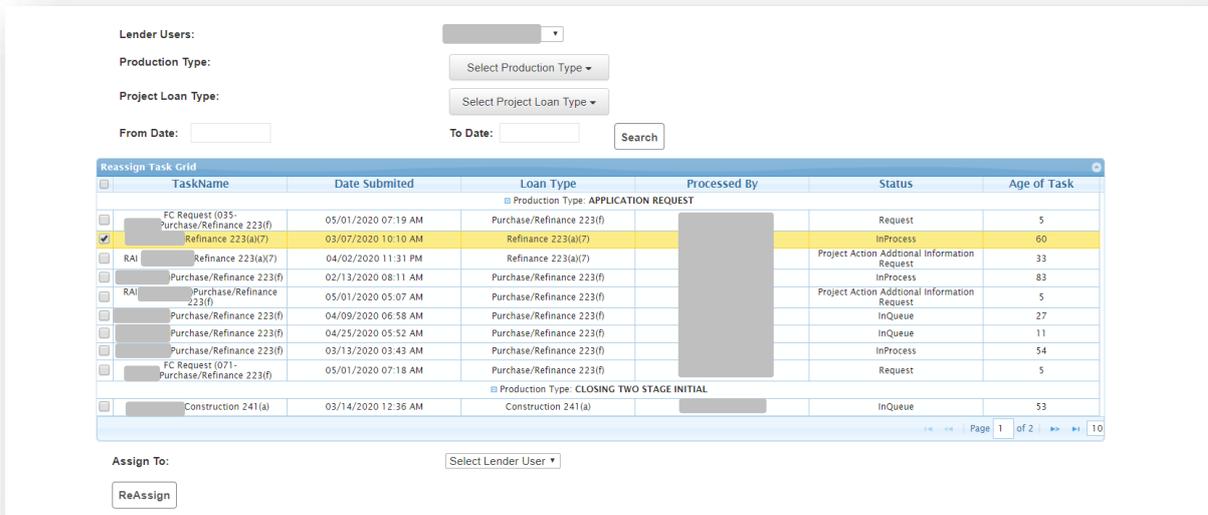
Step 4: Select Lender user (drop down list) and select any user in the drop down list and click on search button. This will bring up a list of all the transactions associated to that user.

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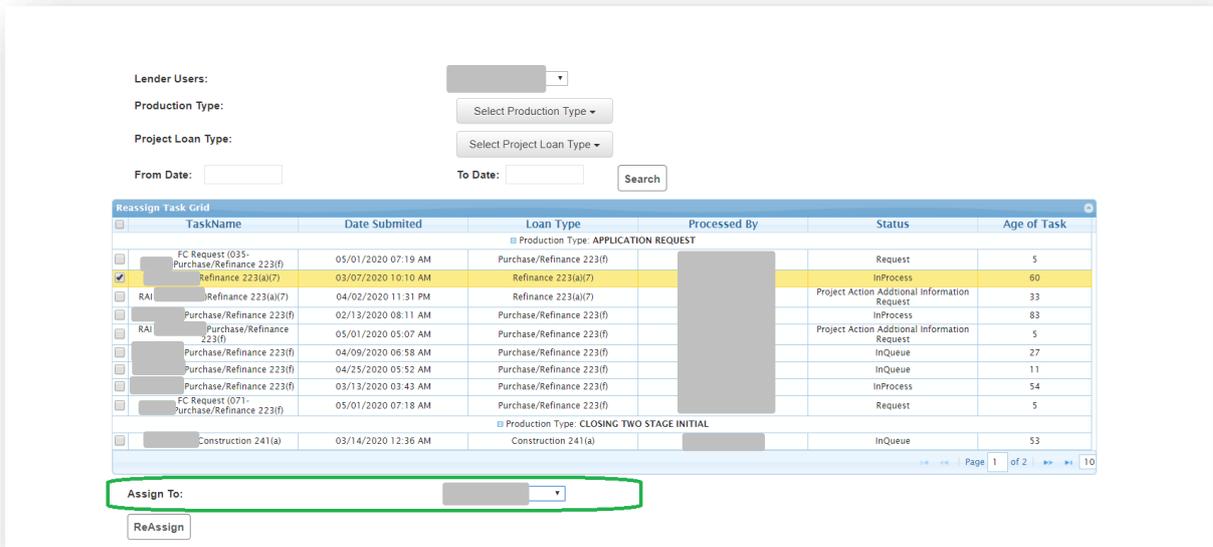


Step 5: Select any task in the grid and click the checkbox to the left of the selection as seen in the screenshot below:

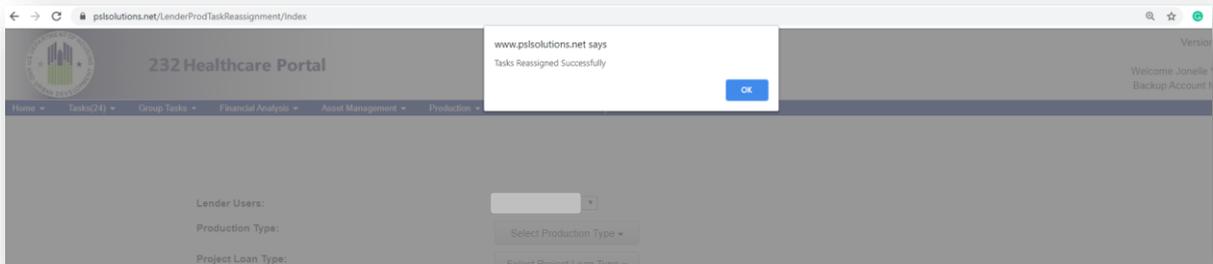


Step 6: Now you must select a particular user to assign the task to (located below the grid is the 'Assign to' menu with drop down list, see screen shot)

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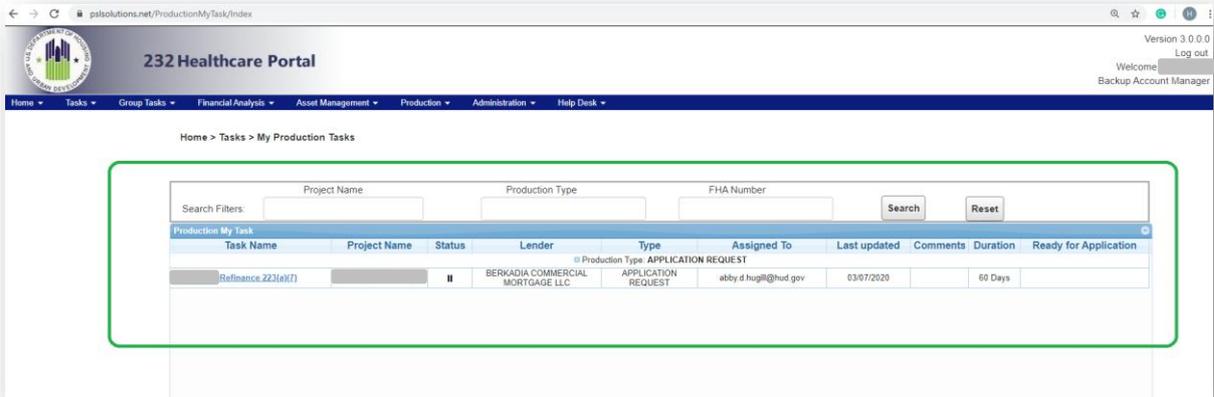


Step 7: Once you have made your selection, click the ‘Reassign’ button. After the process has been completed the system will display a pop-up message reading “Task Reassigned Successfully”. See screen shot.

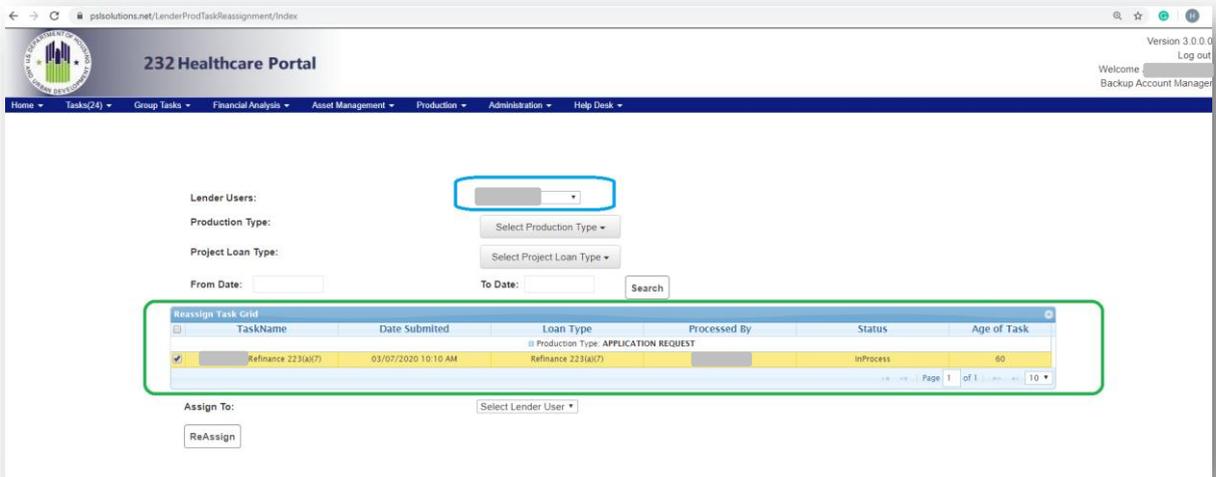


Step 8: After reassigning the task, it will disappear from the grid and become available for the reassigned user. The reassigned user can access their new task from their “My Production Tasks” tab. Please see screen shot.

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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.



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

Subject: Task Re-Assignment, ([0XX-XXXXX](#)) Refinance 223(a)(7).

Message Body:

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

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