



NMLS# 3304

# Tasking The Loan User Manual TASKING SAYS “LOOK AT ME”



April 2020

# Tasking/**Resolving** = Notifying Ops your PTD, PTF conditions need review.

**\*\*\*Resolving the Approval Task sends notification to our Operations Staff that uploaded Approval conditions need review.**

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Tasks (1)

Conditions (2)

Tasks

Matic Insurance    Matic Insurance - Test

**ADD NEW TASK**    **REFRESH**    Display Task assigned to: Anyone ▾    Task #

Open Tasks

<input type="checkbox"/> Status	Subject	Due Date
<input type="checkbox"/> Active	Submit: Underwriting Conditions Ready for Review	08/20/2020
<input type="checkbox"/> Resolved	This loan has been pre-locked. The full submission package is required within 5 calendar days for a 30 day pre-lock.	08/07/2020

**re-activate**

**ASSIGN**    **RESOLVE**    **SET FOLLOW-UP DATE**    **EXPORT TO CSV**    **EXPORT TO PDF**

Open Tasks

<input type="checkbox"/> Status	Subject	Due Date
<input type="checkbox"/> Active	Submit: Underwriting Conditions Ready for Review	08/20/2020

**RESOLVE**

Active Tasks require the user to take an action. Notice the status of this Task is “Active”. Click on the word “Resolve”.

Open Tasks

<input type="checkbox"/> Status	Subject ^	Due Date
<input type="checkbox"/> Resolved	Resolve this task when all Approval conditions have been uploaded to the file	03/27/2018

**re-activate**

Notice that the status now reflects “Resolved”.

# Tasking The Loan - Suspense Task

Resolving the Suspense Task in the Portal is what sends notification to our Operations Staff—that the uploaded Suspense conditions are in need of review. From the navigation page the user needs to click on the “Tasks” link.

Tasks

ADD NEW TASK REFRESH Display Task assigned to: Anyone Task #

Open Tasks

Status	Subject	Due Date
Active	Resolve this task when all Suspense conditions have been uploaded to the file	03/27/2018
Resolved	Resolve this task when all documents are gathered and file is complete and ready for submission	03/22/2018

ASSIGN RESOLVE SET FOLLOW-UP DATE EXPORT TO CSV EXPORT TO PDF

Closed Tasks

Active Tasks require the user to take an action. Notice the status of this Task is “Active”. Click on the word “Resolve”.

Open Tasks

Status	Subject	Due Date
Active	Resolve this task when all Suspense conditions have been uploaded to the file	03/27/2018

Notice that the status now reflects “Resolved”.

Open Tasks

Status	Subject	Due Date
Resolved	Resolve this task when all Suspense conditions have been uploaded to the file	03/27/2018

Congratulations, you have successfully notified our Operations Staff that the Suspense conditions have been uploaded into the file and need to be reviewed.