



HomePath for Short Sales

User Guide for Fannie Mae Servicers

HomePath for Short Sales is powered by Aspen Grove





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Introduction

Welcome to the HomePath for Short Sales Platform, powered by Aspen Grove, a comprehensive solution designed to streamline your work as a Fannie Mae Servicer. This user guide will walk you through the various features and functionalities of the platform, ensuring you have a smooth onboarding experience and can efficiently manage your tasks and cases.

Getting Started

Upon logging into the HomePath for Short Sales portal, you'll be presented with the main screen. The default landing page is the Work List tab, which we'll explore in detail later in this guide. Let's start by familiarizing ourselves with some key features.

Quick Search

The quick search functionality is a powerful tool designed to help you efficiently locate specific properties or loans within the system.

Location and Usage

- The search bar is located at the top of the main screen.
- To use it, follow these steps:
 1. Click on the search bar
 2. Select the appropriate search criteria from the dropdown menu
 3. Enter the relevant information
 4. Press enter or click the search button

Search Options

You can search using various identifiers:

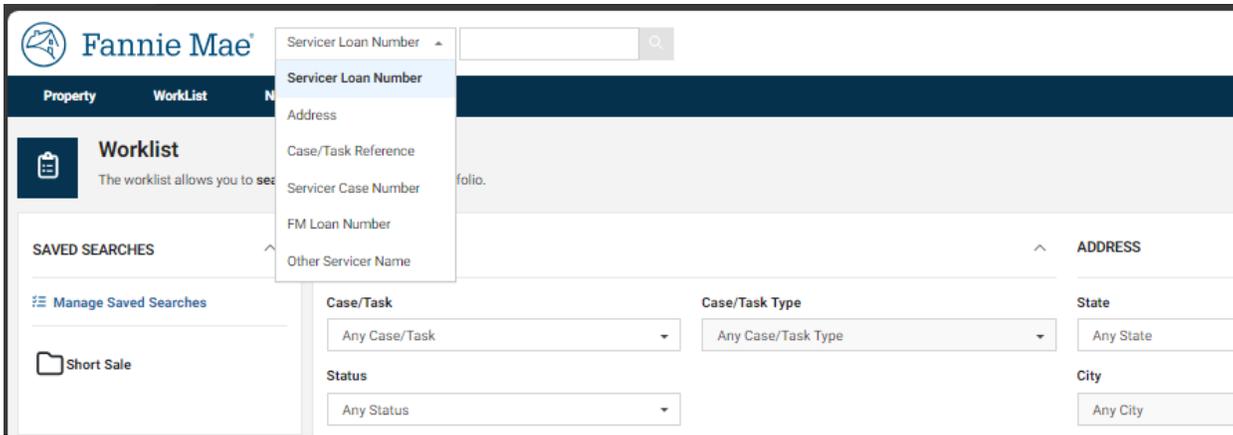
- Servicer loan number
- Property address
- Case or task number
- Fannie Mae loan number

Example

Let's say you need to find a property using its loan number:

1. Select "servicer loan number" from the dropdown
2. Enter the loan number
3. Initiate the search

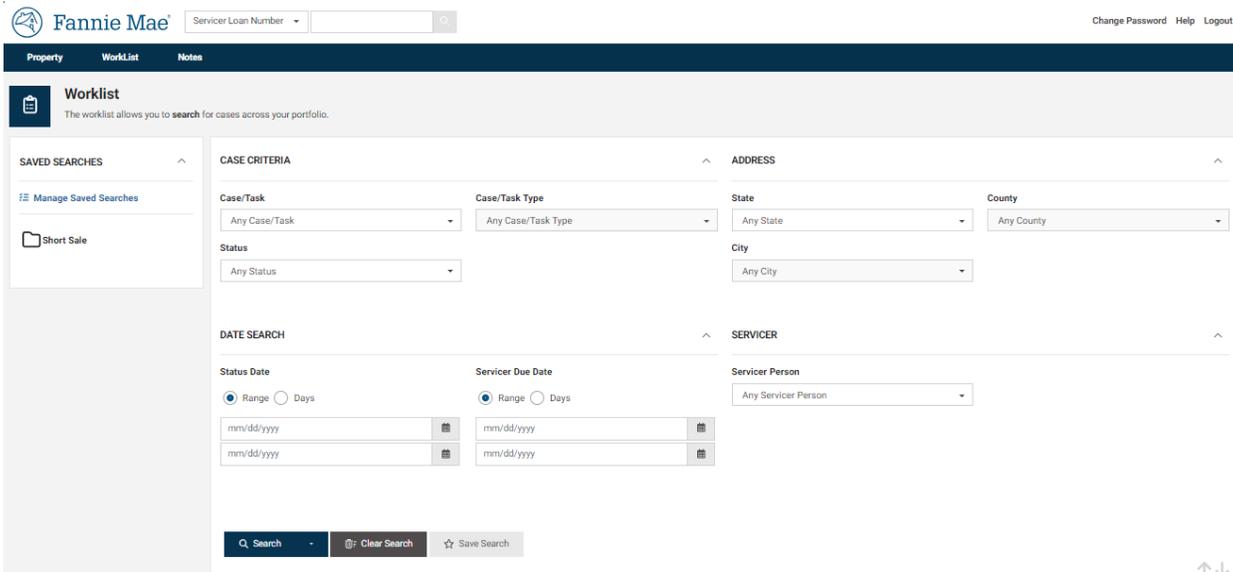
The system will immediately redirect you to the specific property associated with that loan number.



Business Context: This enables servicers to quickly access property information, especially when communicating with agents or Fannie Mae representatives. It significantly reduces the time spent navigating through multiple screens to find relevant information.

Work List

The Work List tab is a central feature of the HomePath for Short Sales application and serves as your primary workspace. From here you can quickly get an overview of all your active cases, and drill down into the cases for more detail, as required.



Accessing the Work List

- The Work List is the default landing page when you log in.
- You can also access it by clicking on the "Work List" tab at the top of the screen.

Search Filters

The Work List offers several search filters to help you locate specific information:

1. Case and Task Types:

- Short Sale Case (with three subcategories):



- List Price Guidance and Marketing Case
- Short Sale Offer Case
- Value Dispute Case

CASE CRITERIA ^

Case/Task
x Short Sale x ▾

Status
Any Status ▾

Case/Task Type
Any Case/Task Type ▾
Short Sale
List Price Guidance & Marketing
Short Sale Offer
Value Dispute Case

DATE SEARCH ^

- Miscellaneous Tasks:
 - Acknowledge Cancel or Decline Task – Actionable by Servicer
 - Approved Offer Task - Actionable by Servicer
 - Follow Up Task – Actionable by Agent – Read Only View
 - Information Request Task - Actionable by Agent – Read Only View
 - Value Dispute Task - Actionable by Servicer

CASE CRITERIA ^

Case/Task
x Miscellaneous x ▾

Status
Any Status ▾

Case/Task Type
Any Case/Task Type ▾
Miscellaneous
Acknowledge Cancel or Decline
Approved Offer
Follow-Up
Information Request
Value Request

DATE SEARCH

Status Date

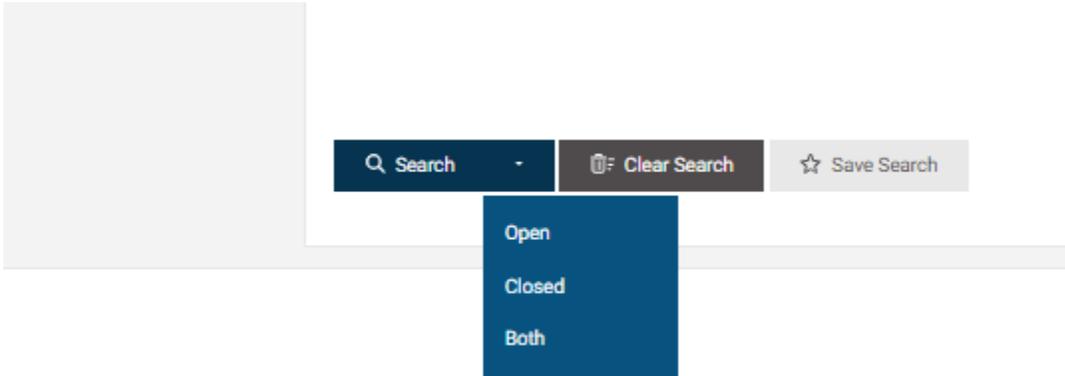
2. **Status:** Filter by specific statuses (e.g., Active Marketing).
3. **Location:** Filter by address, state, county, and city.
4. **Date Ranges:** Filter by specific time periods.

Performing a Search



1. Select your desired filters from the options provided.
2. Click the search bar at the bottom of the filter section.
3. Choose to display open cases, closed cases, or both.
4. Click "Search" to execute.

Note: Without any filters, clicking search will return all open cases and tasks.



Grid Display

Search results are displayed in a customizable grid:

- Rearrange columns by dragging and dropping.
- Use "Remember Column Sequence" to save your preferred layout.
- Sort columns by clicking on the header (e.g., by date or Servicer Person).
- Click on blue links to open detailed views of cases or tasks.

Export Feature

You can export the grid data to Excel by clicking the export icon, facilitating further analysis or reporting.

30 Case/Task(s) | 30 Open [Export to Excel](#)

Remember column sequence

<input type="checkbox"/>	Case/Task #	Servicer Case #	Type	Servicer Loan Number	Status	Servicer Person	Status Date	Status Comment	Servicer Due Date	Address	Opened Date	Person	Team	County	City
<input type="checkbox"/>	T0025305301		Short Sale Offer	1510 test2	Offer Paused	Mary Servicer	10/15/2024		10/15/2024	123, Columbus, Fr...	10/15/2024	Collin Zacek	Short Sale	Franklin	Colu
<input type="checkbox"/>	T0025305392		Value Dispute Case	1510 test2	Valuation Specialist R...	Mary Servicer	10/15/2024		10/15/2024	123, Columbus, Fr...	10/15/2024	Collin Zacek	Short Sale	Franklin	Colu
<input type="checkbox"/>	T0025305149		Value Dispute Case	SD101120242	Initiated	Mary Servicer	10/11/2024		10/16/2024	Sd101120242, Mia...	10/11/2024	FNMA admin	FNMA	Miami-Dade	Miar
<input type="checkbox"/>	T0025305303		Short Sale Offer	1510 test3	Eligibility Pending	Mary Servicer	10/17/2024		10/17/2024	Test, Columbus, Fr...	10/15/2024	Hillary Johns...	Short Sale	Franklin	Colu
<input type="checkbox"/>	T0025305303		Short Sale Offer	1510 test3	Eligibility Pending	Katelyn									

Business Context: The Work List is designed to give servicers a comprehensive view of their caseload. It allows for efficient task management and helps prioritize work based on status, type, or urgency. This feature is particularly useful for team leads who need to oversee multiple cases and assign work to team members.



Saved Searches

The Saved Searches feature allows you to save frequently used search criteria for quick access, improving efficiency in your daily tasks.

Creating a Saved Search

1. Set up your search criteria in the Work List
2. Click the "Save Search" button
3. Choose or create a folder to store the search
4. Name your search
5. Optionally, make the search public by selecting the checkbox, this makes the saved search available to everyone within your organization.
6. Click "Save" to finalize

Using Saved Searches

1. Clear any existing search criteria
2. Click on the desired saved search in the side panel
3. The search criteria will automatically populate
4. Click the "Search" button to execute

Pre-configured Saved Searches

The platform comes with several pre-configured saved searches, including:

- Active Offer Cases
- Eligibility Needed
- List Price Guidance Cases
- New Value Order Requests
- Send Approval Letter
- Value Dispute Cases
- Value Order Incomplete



Worklist

The worklist allows you to **search** for cases across your portfolio.

SAVED SEARCHES

Manage Saved Searches

Short Sale

- Acknowledge Cancel or Decline
- Active Offer Cases
- Eligibility Needed
- List Price Guidance & Marketing Cases
- New Value Order Requests
- Send Approval Letter
- Value Dispute Cases
- Value Order Incomplete

CASE CRITERIA

Case/Task

Any Case/Task

Status

Any Status

DATE SEARCH

Status Date

Range Days

mm/dd/yyyy

mm/dd/yyyy

Business Context: Saved Searches significantly streamline your workflow by providing quick access to frequently used search criteria.

Reviewing Properties

When you select a property from your Work List or through a Quick Search, you'll be presented with a detailed property overview screen.



Property Overview Layout

The screen is divided into several key sections:

- **Left Side:** Displays a picture of the property
- **Top:** Shows essential details such as:
 - Address
 - Servicer loan number
 - Servicer name
 - Property reference (unique to the application)
 - Property status
 - Fannie Mae loan number
 - Investor information

Key Sections

1. **Short Sale Process:** Located in the lower left portion of the screen.
2. **Key Information:** To the right of the short sale process, displaying critical data points surfaced from the process.
3. **Case and Task Management:** At the bottom of the screen, manage all cases and tasks related to the property:
 - Open Cases
 - Closed Cases
 - Archived
 - All Cases and Tasks

Detailed Process Information

To access more in-depth information:



1. Click "View Process" to see all stored Fannie Mae information.
2. Review key indicators, important dates, and property details.
3. Access valuation contact information when available.

Valuation Data

When a valuation is completed and returned to Fannie Mae:

- Data is uploaded to the process screens
- Information is directly added to any open case on the property

Case Management

Keep track of all Short Sale cases raised on your properties.

List Price Guidance and Market Case

List Price Guidance is one of the case options in the short sale workflow. As a servicer, you'll have read-only access to these cases, allowing you to review important information.

Accessing List Price Guidance

1. From the Work List, filter for List Price Guidance cases.
2. Click on the case you wish to review.

Key Information

When reviewing a List Price Guidance task, you'll see:

- Recommended pricing
- Valuation information (when available)
- Decision details

Status Progression

List Price Guidance cases go through several statuses:

1. Initiated: When the agent first raises the case
2. Received: Under review by Fannie Mae
3. Validated: Upon successful validation by Fannie Mae
4. Valuation: If a valuation is required
5. Active Marketing: Once fully validated and valuation received

Valuation Process

If a valuation is required:

- The status changes to "Valuation"
- A Value Request Task is sent to you as the servicer



- You are responsible for ordering the valuation in SMDU

Case Cancellation

- An agent can request cancellation at any point
- The request is sent to Fannie Mae for confirmation
- Upon confirmation, the status changes to "Cancelled"

The screenshot displays a software interface for 'List Price Guidance & Marketing - T0025305271'. The interface includes a top navigation bar with a 'Close' button and a sidebar with a 'Process List' menu. The main content area has several tabs: Summary, Notes, Photos, Attachments, Contacts, Activities, and History. The 'VALUATION DETAIL' section is expanded, showing the following information:

Valuation Requested	Good Through Date
<input type="text"/>	10/31/2024
As Is Value	BPO Expiration Date
\$ 480000.00	<input type="text"/>
LIST PRICE GUIDANCE DETAIL	
List Price Guidance	Decision Comments
\$ 500000.00	As per Valuation

Extract from case

Short Sale Offer Case

The Short Sale Offer case is a key component of the solution, allowing you to track progress on offer received on properties.

Accessing Short Sale Offers

1. From the Work List, filter for Short Sale Offer cases.
2. Click on the case you wish to review.

Key Features

- Detailed property and offer information
- Offer details and deductions and Estimated Net Sales proceeds
- Negotiation section for counteroffers
- Document attachments



- Activity tab for negotiation history
- Notes functionality for communication

Status Progression

Short Sale Offers go through many statuses, below we've given a flavour for some of them:

1. Initiated
2. Validated
3. Document and Contract Review
4. Approved (with different levels)
5. Negotiation (if required)
6. Final Approval or Decline
7. Change in Term Requests
8. Closed (upon property sale)

Negotiation Process

The negotiation section allows for back-and-forth communication:

- Fannie Mae's counteroffer appears on the left
- Agent's response can be entered on the right
- Status updates reflect the latest offer and its source

Communication and Notes

- Add notes and direct them to specific parties (Fannie Mae or agent)
- Set visibility settings (servicer only, or all parties)
- Send email notifications along with note creation



Short Sale Offer - T0025305276
 89 Top St, Catawba, Clark, OH 43010
 Servicer Loan Number 85212369
 Servicer Test Servicer Investor FNMA

Summary Notes Photos Attachments Contacts Activities History

Filter sections

Property Access
 Listing
 Home Owner
 Buyers
 Contract Information
 Lien 1
 Documents

Contract Sales Price ⓘ
 \$ 475000.00

Agent Commission ⓘ
 Amount(\$) Percentage(%)

Agent Commission (%) ⓘ
 5

Agent Commission ⓘ
 \$ 23750.00

Concession To Buyer Costs ⓘ
 \$ 5.00

Settlement/Attorney Fee ⓘ
 \$

Recording Fees ⓘ
 \$

Transfer Tax/Doc Stamps ⓘ
 \$

Relaxation Incentive ⓘ

Other Seller Concessions ⓘ
 \$

Title Insurance ⓘ
 \$

Property Taxes ⓘ
 \$

Delinquent HOA Fees ⓘ
 \$

Other Expenses ⓘ

Extract from case

Value Dispute Case

The Value Dispute case allows agents to challenge property valuations. As a servicer, you'll need to be aware of these disputes and their impact on other cases.

Initiating a Value Dispute

When an agent raises a value dispute, it becomes visible in your Work List.

Status Progression

The value dispute goes through several stages – key steps are listed below:

1. Initiated
2. Received
3. Validated
4. Evaluation Specialist Review
5. Evaluation Specialist Review Completed
6. Sales Rep Acknowledgment
7. Closed

Impact on Other Cases



- A validated Value Dispute case will put open Short Sale Offer or List Price Guidance & Marketing cases on pause while the value of the property is reviewed by a specialist Fannie Mae team.
- Closing a value dispute automatically un-pauses any open list price guidance or short sale offer cases that were put on hold during the dispute.
- The agreed value is updated on open cases and stamped with the date of the value dispute resolution.

Case Details

Within each case, you can view the relevant information:

The screenshot displays the 'Value Dispute Case - T0025305496' interface. The case details include the location 'Test, Columbus, Franklin, OH 43222', 'Servicer Loan Number 1610 test 2', and 'Investor FNMA'. The 'Summary' tab is active, showing a 'Filter sections' search bar and a list of sections: 'Agent's Submission', 'Sales Rep Initial Review', 'Valuation Specialist Review', 'Sales Rep Final Review', and 'Documents'. The 'Sales Rep Initial Review' section is expanded, showing 'Sales Rep Notes To Specialist'. The 'Valuation Specialist Review' section is also expanded, showing a '2nd Look Value Result' of \$ 2222.00 and 'Valuation Specialist Comments' with the text 'test'. The 'Sales Rep Final Review' section is expanded, showing 'Sales Rep Notes To Agent'. The 'DOCUMENTS' section is partially visible at the bottom.

Extract from case

Task Management

There are several tasks that can be raised by Fannie Mae, requiring action by you as the Servicer. You can locate these in the worklist.

Value Request Task

The Value Request task is a critical component of the short sale process, ensuring accurate property valuations are obtained.

Task Location

- Found under the "Miscellaneous" category in the Work List
- Actionable by you as the servicer



Task Details

When assigned a Value Request task, you'll see:

1. Details of the related short sale offer
2. Access information for the property (if available)

Required Action

Your primary action is to order a Fannie Mae short sale value in the SMDU (Servicing Management Default Underwriter) system.

Task Completion

After ordering the valuation:

1. Update the task status to "Ordered"
2. Save the task to confirm to Fannie Mae that the valuation has been ordered

Value Request - T0025305688
 123123, Columbus, Franklin, OH 43222
 Servicer Loan Number 1510 test4
 Servicer Test Servicer Investor FNMA

Save Case/Task | Cancel

Summary | Notes | Photos | Attachments | Contacts | Activities | History

Open Date	Status Date
10/17/2024	10/17/2024

DESCRIPTION

Please order a FNMA short sale value in SMDU.

Associated Reference Number

Short Sale Offer - T0025315421

PROPERTY ACCESS

Occupancy Status

Owner Occupied

Point Of Contact | **Phone**

Mary Jones | (456) 456-4566

Lock Box Code | **Instructions**

8526 | Front Door

Change Status -

Business Context: Timely completion of Value Request tasks is crucial for maintaining the momentum of the short sale process. As a servicer, your prompt action in ordering valuations helps ensure that all parties are working with accurate and up-to-date property information.

Approved Offer Task

The Approved Offer task notifies you when a short sale offer has been approved and requires communication to the homeowner.

Identifying Approved Offer Tasks

- Located in the Miscellaneous category of your Work List



- Focus on tasks with the status "Send Approval Letter"

Task Information

The task includes:

- The reference number of the approved short sale offer – this is important so you can review the short sale approval details. You will also receive an email notification of the Approval Details
- Instructions to send the approval letter to the homeowner

Required Action

1. Retrieve offer details from the associated short sale offer task
2. Compile the approval letter, including all relevant offer details
3. Send the approval letter to the homeowner

Task Completion

After sending the letter, update the task status to Completed.

Acknowledge Cancel or Decline Task

This task ensures you're promptly informed about cancelled or declined short sale offers.

Task Identification

- Found in the Miscellaneous category of your Work List
- Look for tasks with the status "Pending Acknowledgement"

Task Information

The task displays:

- The short sale offer reference number
- Whether the offer has been cancelled or declined



- Any notes added during the cancellation process

Required Action

1. Review the provided information
2. Update the status to "Acknowledge"
3. Save the task to confirm to Fannie Mae that you've received and understood the notification

Acknowledge Cancel or Decline - T0025305695
89 Top St, Catawba, Clark, OH 43010
Servicer Loan Number 85212369
Servicer Test Servicer Investor FNMA

Summary Notes Photos Attachments Contacts Activities History

Person
FNMA admin

DATES

Open Date	Status Date
10/17/2024	10/17/2024

DESCRIPTION
The referenced Short Sale Offer has either been cancelled or declined. Please see comments below and acknowledge.

SPECIAL INSTRUCTIONS

SHORT SALE ACKNOWLEDGE CANCEL/DECLINE

Comments
Short Sale Offer Ref T0025305528 is Cancelled -

Notes Management

The Notes functionality allows you to review and send notes across all properties and cases.

Notes can be found at 3 levels:

1. Organization Notes – allows you to view only all notes across all properties and cases
2. Property Level Notes - allows you to view and add notes specify to that case or task
3. Case and Task Notes – allows you to view and add notes specify to that case or task



Organizational Notes

Note List

Use the filters provided to search for notes across your portfolio.

SEARCH FILTERS

Note Type *
All

WorkList Type
Any worklist type

From Date *
09/18/2024

To Date *
10/18/2024

Search Notes Reset filters Include Archived Notes

Rows per page 25

Date/Time	To	From	Subject	Note	Attached To	Seen By	Is Read
<input type="checkbox"/> 10/17/2024 18:16:11	frmaadmin@aspengrovesol...		1710 test1 - Test, Columbus, Fra...	Test Note	Task	All	<input type="checkbox"/>
<input type="checkbox"/> 10/17/2024 9:34:38	testservicer@uat.com		SD101120242 - Sd101120242, ...	test	Property	All	<input type="checkbox"/>
<input type="checkbox"/> 10/16/2024 11:11:11			SD101120242 - Sd101120242, ...	Added by Mgmt - ALL	Property	All	<input type="checkbox"/>
<input type="checkbox"/> 10/16/2024 11:08:01			SD101120242 - Sd101120242, ...	Added by Client - ALL	Property	All	<input type="checkbox"/>

Accessing Organization Notes

- Click on the Notes tab at the top of the interface

Searching and Displaying Notes

1. Click the "search option" button
2. Adjust the date range as needed (default is one month)

Note Information

Each note displays:

- Read/Unread status
- Attachment indicator
- Date of the note
- Associated property or case

Interacting with Notes

- Click on a note to view its full content
- Download attachments directly from the Notes tab

Important Considerations

- New notes cannot be added from this Notes tab
- Create notes within the specific case or property they relate to

Business Context: The centralized Notes feature enhances communication and information sharing across your team. It allows you to quickly review recent updates or communications related to multiple properties or cases, improving overall workflow efficiency.



Property Notes

- View all notes relating to a property
- Add Notes for that property- subject line is prepopulated with the Servicer Loan Number and the property address
- If you enter an email address in the to: field, an email will be sent to that person
- Regardless of whether you enter an email address, the note will be saved in the Notes tab
- You can set the Seen by on the note:
 - Servicer – FM and Servicer can view the note
 - All - FM, Agent and Servicer can view the note

PROPERTY DETAILS

Servicer Loan Number	85212369
Servicer	Test Servicer
Property Reference	P202402606261
Status	Open
FM Loan Number	852852852
Other Servicer Name	Test Servicer
Investor	FMMA
Memo	

PROPERTY LOCATION

Address	89 Top St
Zip Code	43010
City	Catawba
County	Clark
State	Ohio

[Click here to Find On Map](#)

Property Notes ✕

Note Type: Search: Priority: Include System Notes:

[+ Add](#) [📧](#) [📧](#)

1 Note(s)

Date/Time	To	From	Note	Process Name	Case/Task Name	Case/Task Reference	Attached to	Seen By
10/18/2024 11:45:54	maryservicer@uat.com	maryservicer@uat.com	85212369 - 89 Top St, Catawba, Clark, OH 43010 Test Note				Property	Servicer ↔ 📧

Items per page: 10 1 - 1 of 1



Add a new Note



To

Mary Servicer (maryservicer@uat.com)

Enter an email or start typing to select from the list

Subject *

85212369 - 89 Top St, Catawba, Clark, OH 43010

Priority *

Normal

Seen By *

All

Servicer

All

Note *

B *I* ~~S~~ U P H1 H2 H3 H4 H5

Test Note

Save Note

Cancel

Case and Task Notes

- Open the relevant case or task
- Select Notes Tab to see notes specific to that case or task
- Like the property notes, here you can view or add notes for that case on task
- When Adding notes, subject will be prepopulated with the Servicer Loan Number, the property address, Task/Case Number and Task/Case name



Short Sale Offer - T0025305880
 89 Top St, Catawba, Clark, OH 43010
 Servicer Loan Number 85212369
 Servicer Test Servicer Investor FNMA

Save Case/Task Cancel

Summary **Notes** Photos Attachments Contacts Activities History

CASE DETAILS

Status: **Approved**

Status Reason: bgbhdf

ASSIGNMENT TYPE

Person: FNMA admin

Documents and Attachments

- Documents can be located at both a case/task and property level
- You can also upload attachments
-

Property Attachments

- Open Property
- Select Attachment Icon
- This tab includes all documents uploaded to any case/task relating to this property

Fannie Mae | Servicer Loan Number | Change Password Help Logout

Property WorkList Notes

89 Top St, Catawba, Clark, OH 43010

Attachment

PROPERTY DETAILS

Servicer Loan Number: 85212369
 Servicer: Test Servicer
 Property Reference: P202402606261
 Status: Open
 FM Loan Number: 852852852
 Other Servicer Name: Test Servicer
 Investor: FNMA
 Memo: Servicer Person = mary@test.com

PROPERTY LOCATION

Address: 89 Top St
 Zip Code: 43010
 City: Catawba
 County: Clark
 State: Ohio
[Click here to Find On Map](#)

Property Attachments

Attachment Name Search +

SELECT ALL | DESELECT ALL Sort & Filter

4 Attachments(s) 0 Attachments(s) Selected

Attachment Name	Description	Process Name	Case/Task Name	Date Uploaded	Case/Task Reference	Attachment Type	Attached To	Seen By
<input type="checkbox"/> 9310b238-1005-46e1-93c6-d2854c7...	Photos-			10/14/2024		Property Summary Photo	Property	All
<input type="checkbox"/> house 3.jpg	Photos-			10/14/2024		Property Summary Photo	Property	All
<input type="checkbox"/> house 2.jpg	Photos-			10/14/2024		Property Summary Photo	Property	All
<input type="checkbox"/> House1.jpg	Photos-			10/14/2024		Property Summary Photo	Property	All



Case/Task Attachments

- Open Case/Task
- Select Attachments Tab

Short Sale Offer - T0025305880 ⓘ
89 Top St, Catawba, Clark, OH 43010 ⓘ
Servicer Loan Number 85212369
Servicer Test Servicer Investor FNMA

Close

Summary Notes Photos **Attachments** Contacts Activities History

Search + Upload Attachment(s)

5 Attachment(s)

<input type="checkbox"/>	Attachment Name	Description	Date Uploaded	Attachment Type	Seen By	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	

Items per page: 25 1 - 5 of 5 < >

Short Sale Offer - T0025305880 ⓘ
89 Top St, Catawba, Clark, OH 43010 ⓘ
Servicer Loan Number 85212369
Servicer Test Servicer Investor FNMA

Close

Summary Notes Photos **Attachments** Contacts Activities History

Search + Upload Attachment(s)

5 Attachment(s)

<input type="checkbox"/>	Attachment Name	Description	Date Uploaded	Attachment Type	Seen By	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	
<input type="checkbox"/>	JPEGphoto.jpg	Before-	10/18/2024	Photo	All	

Items per page: 25 1 - 5 of 5 < >



Case Assignment

The case assignment feature allows you to assign cases to specific team members, enhancing workflow management and accountability.

Assigning a Case

1. Locate the case you want to assign in your Work List
2. Use the dropdown list to select the appropriate team member
 - Only users with access to your portal will be displayed
 - If you require additional users to be added, please contact Fannie Mae

The screenshot displays the 'Value Request - T0025305273' case details. The 'ASSIGNMENT TYPE' section shows the current assignee as 'Hillary Johnson'. A dropdown menu is open, showing a list of 'Servicer Person' options: 'Mary Servicer', 'Peter FNMA Servicer', and 'QA FNMA Client'. The dropdown is highlighted with a red box. The interface also shows 'Open Date' (10/14/2024) and 'Status Date' (10/14/2024).

Filtering Assigned Cases

- Use column filters to sort and group cases by assigned individual
- Include the assigned person in your search criteria to focus on specific cases

Important Considerations

- Some cases may remain unassigned, until a team member has been assigned
- When searching or filtering, account for unassigned cases to ensure a comprehensive view



WORKLIST
The worklist allows you to search for cases across your portfolio.

SAVED SEARCHES ^
Manage Saved Searches

Short Sale

CASE CRITERIA v ADDRESS v

DATE SEARCH ^ **SERVICER** ^

Status Date: Range Days
mm/dd/yyyy

Servicer Due Date: Range Days
mm/dd/yyyy

Servicer Person
Any Servicer Person

Search Clear Search Save Search

32 Case/Task(s) | 32 Open Export to Excel

Remember column sequence

Case/Task #	Servicer Case #	Type	Details	Status	Status Date	Servicer Loan Number	Status Comment	Servicer Person	Servicer Due Date	Address	Opened Date
<input type="checkbox"/> T0025305301		Short Sale Offer	Occupancy status Owner Occupied	Offer Paused	10/15/2024	1510 test2		Mary Servicer	10/15/2024	123, Columbus, Fr...	10/15/2024