**INFO-ACCESS**

**Work Queues Worksheet**



## LOANS/DEALS/DEPOSITS

### EXCEPTIONS

* Query for a list of exceptions under the Loans/Exceptions section.
* Query for a list of exceptions under the Deals/Exceptions section (if applicable).
* Query for a list of exceptions under the Deposit/Exceptions section.

### PROJECTED EXCEPTIONS

* Query for a list of exceptions under the Loans/Projected Exceptions section.
* Query for a list of exceptions under the Deals/Projected Exceptions section (if applicable).
* Query for a list of exceptions under the Deposit/Projected Exceptions section.

### DISTINCT EXCEPTIONS

* Query for a list of exceptions under the Loans/Distinct Exceptions section.
* Query for a list of exceptions under the Deals/Distinct Exceptions section (if applicable).
* Query for a list of exceptions under the Deposit/Distinct Exceptions section.

### EXCEPTION FUNCTIONALITY

* Understand why action dates and exception dates may be different.
* Use hyperlinks to navigate to the customer/exception details views.
* View invalidation comments in the work queues window.
* Add documents via drag and drop, import, and/or scan to clear documents from the work queue.
* Understand what happens when a document is added to an exception record.

## MY WORK ITEMS

* View your events in My Work Items
* Review the Exception Work Queue and understand how it functions.
* View the payoff data category (if you work paid off loans)

## EVENTS

* Query for a list of exceptions for yourself or others.

## NOTICES

* Query for a list of notices that will be generated for production.

## SAVED QUERIES

* Setup a saved search query.

## RELATED MATERIALS

* INFO-ACCESS Administrator Guide
* INFO-ACCESS User Guide
* Quick Reference: Events
* Quick Reference: How to Communicate & Report Invalidation Reasons
* Quick Reference: Review Queue Guide
* Quick Reference: Understanding Requirement Dates
* INFO-TIPS: Events
* INFO-TIPS: Tracking Tax Returns
* Video Training: Work Queues