

# 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](#)