CHAPTER 10: ADMIN FUNCTIONS

10. ADMIN FUNCTIONS

This chapter discusses the administrative functions available in the Servicing Module:

- **Admin Functions Overview**
- **Common Functionality**
- **Alerts Screen**
- **Announcements Screen**
- **County Clerks Screen**
- **Helpful Links Screen**
- **Investor Screen**
- **Lender Screen**
- **Servicers Screen**
- **Petitioners Screen**
- **Tax Authorities Screen**
- **Vendors Screen**

10.1 Admin Functions Overview

The Admin tab allows authorized users to manage certain functions in the system. These functions will be explained in detail in this section. This tab will be limited to a small number of HUD users.

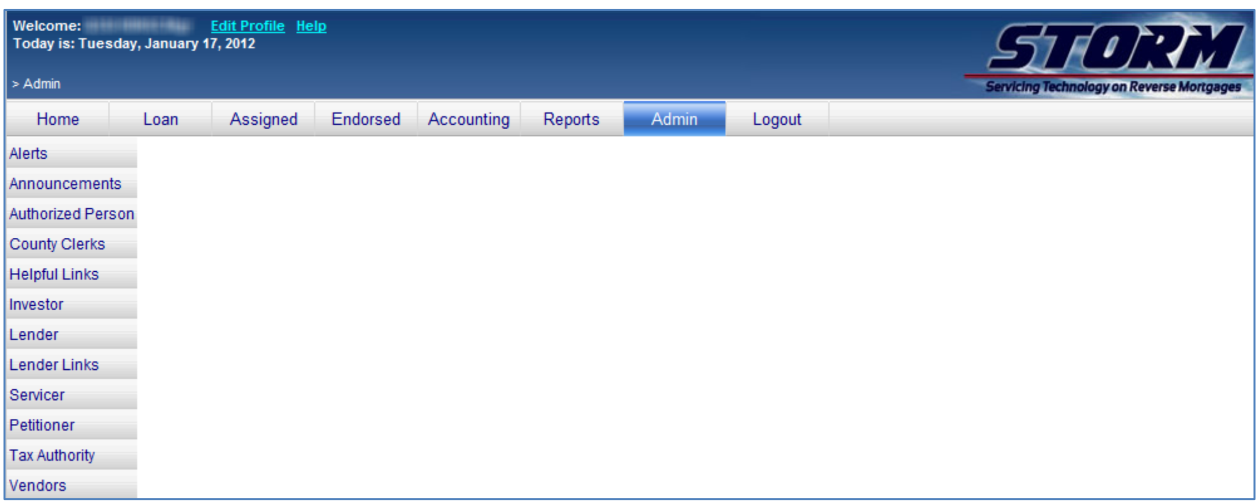

Figure 10-1: Admin Tab

The **Admin** tab enables authorized users to manage the functions listed below:

Function	Description
Alerts	Add new manual alerts, edit or inactivate an existing alert. These alerts are displayed on the alerts screen.
Announcements	Add new announcements, edit or inactivate an existing announcement related to HUD and its reverse mortgage program. The announcements are displayed on the Servicing Module home page under the Announcements section.
Helpful links	Add new links, edit or inactivate an existing link related to HUD and its reverse mortgage program. The links are displayed on the Servicing Module home page under Helpful Links section, displayed on the HERMIT home page.
Update Business partners	Add, edit or inactivate HUD Business Partner related to HECM loan processing: • Investors • Lenders • Servicers • Petitioners • Tax Authority • Vendors • County Clerks

Table 10-1: Admin Functions

10.2 Common Functionality

Most maintenance tasks are performed in general the same way as described below.

Step 1. After logging into the system, click the **Admin** tab.

Step 2. From the navigation bar on the left, select a task and a table will be displayed with the type of admin task you selected.

You now can now:

- Restrict your search by applying various filters. (The criteria vary and are discussed below).
- Export the search results to Excel (except Lender Links)
- Sort the search results by a column
- Create a new record (except Lender Links)

10.2.1 Restricting a Search (General Instructions)

Various search filters are associated with each type of task.

To restrict (filter) your search results:

Step 1. Complete one of more of the fields at the top of the screen.

Step 2. Click **Filter**.

10.2.2 Sorting the Search Results by Column (General Instructions)

You can sort the table for any task by clicking on the column header.

10.2.3 Exporting your Search Results to Excel (General Instructions)

You can export the table of results in .xls format. Exporting to a spreadsheet application enables you to work with the data or import it into some external database applications.

To export the table to Excel:

Step 1. Filter or sort the table if desired.

Step 2. Click the **Export to Excel** link.

Step 3. Follow the prompts to save or open the file.

10.2.4 Create a New Record (General Instructions)

To create a record:

Step 1. Click the **New** button.

Step 2. Fill in (at a minimum) the required fields and click **OK**. The tab information table is displayed and the record will be added to the table.

Specific instructions for creating a record for each type of admin task are discussed later in this chapter.

10.2.5 Editing an Existing Record

To edit a record:

Step 1. Click a record from the table.

Step 2. Edit the desired fields and then click **OK**. The tab information table will display and the edited record will be displayed in the table.

Specific instructions for editing a record each type of admin task are discussed later in this chapter.

10.3 Alerts Screen

This screen enables authorized users to add new alerts manually, or to edit or inactivate an existing alert. Upon the addition of new alert, authorized users can select the new alert from the alerts drop down list and add it on a loan. You cannot delete an alert. An alert that should no longer be used should be changed to inactive.

Figure 10-2: Alerts Screen

10.3.1 Filtering Alerts

Alerts can be filtered by:

- Alert type
- Description
- Severity
- Status

10.3.2 Sorting Alerts

Alerts can be sorted by:

- Alert Type Skey
- Alert Type Name
- Alert Severity
- Status
- Created By
- Create Date
- Maintained by
- Maintenance date

10.3.3 Creating an Alert

To create a new alert:

Step 1. Click the **Alerts** tab and click **New**. The **Alert** screen is displayed so the user can create a new alert.

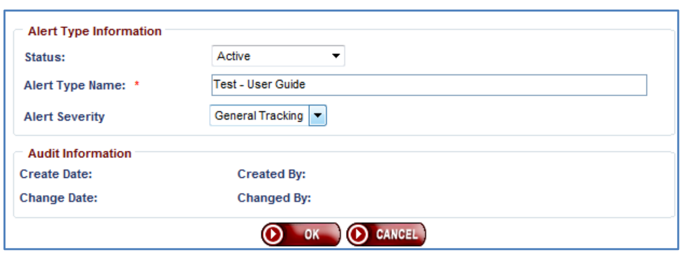

Figure 10-3: Creating an Alert

Step 2. On the dialog box, for Alert Type Information, specify:

- The status of the alert (Active, Inactive, or System Generated)
- The name of the alert
- The severity (General Tracking or Critical)

Step 3. Click **OK.**

10.3.4 Editing an Alert

You can edit all fields for alerts except Alert Type Skey and audit information.

Step 1. Click on a record in the table and the **Edit Alerts** screen will be displayed.

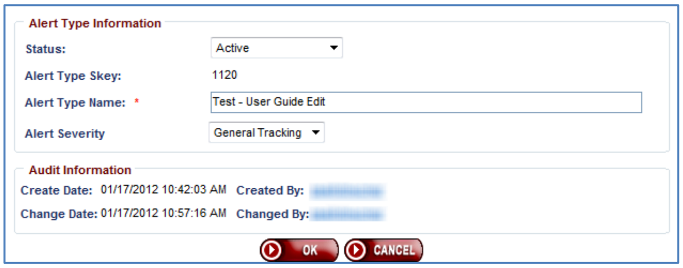

Figure 10-4: Editing an Alert

Step 2. Modify the information you need to edit and click the **OK** button. The **Alerts** tab record table with the edited record will be displayed in the table.

10.4 Announcements Screen

This screen enables authorized users to add new announcements, or to edit or inactivate an existing announcement related to HUD and its reverse mortgage program. The announcements with an active status and an expiration date greater than the current system date are displayed on the Home page under the Announcements section. You cannot delete an announcement. An announcement that should no longer be used should be changed to Inactive.

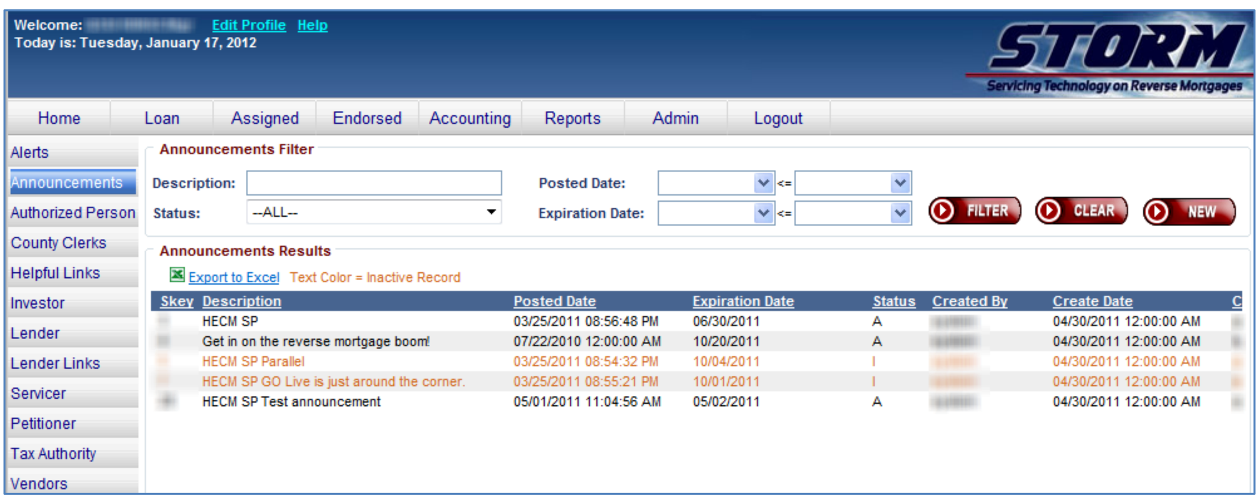

Figure 10-5: Announcements Screen

10.4.1 Filtering Announcements

Announcements can be filtered by:

- Description
- Posted Date
- Status
- Expiration Date

10.4.2 Sorting Announcements

Announcements can be sorted by:

- Skey
- Description
- Posted Date
- Expiration Date
- Status
- Created By
- Create Date

10.4.3 Creating an Announcement

To create an announcement:

Step 1. Click **New.** The **Announcements** screen will display so the user can create an announcement.

Figure 10-6: Creating an Announcement

Step 2. Enter:

- Status (Select either Active or Inactive)
- Posted Date (The day the announcement should appear on the site)
- Expiration Date (The date the announcement should be removed from the site)
- Description (The text of the announcement)

Step 3. Click **OK.**

10.4.4 Editing an Announcement

You can edit all fields for announcements except audit information.

Step 1. Click on a record in the table and the **Announcements** screen will be displayed.

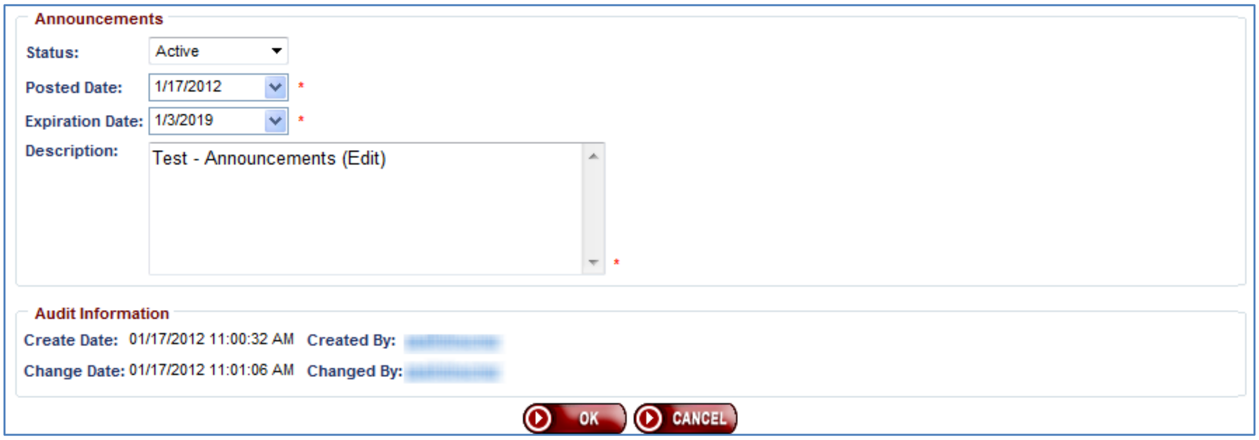

Figure 10-7: Editing an Announcement

Step 2. Modify the information you need to edit and click the **OK** button. The **Announcements** tab record table with the edited record will be displayed in the table.

10.5 County Clerks Screen

This screen enables authorized users to add county clerks, or to edit or inactivate a county clerk.

These are the clerks of court for the county in which the mortgaged property is located. You cannot delete a county clerk. A county clerk that should no longer be used should be changed to Inactive.

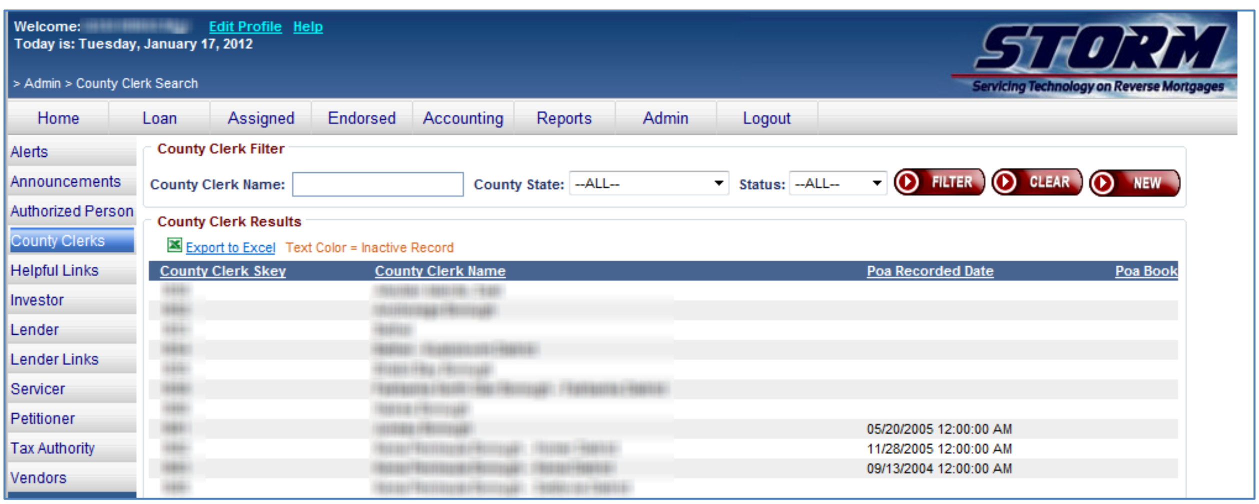

Figure 10-8: County Clerks Screen

10.5.1 Filtering County Clerks

County clerks can be filtered by:

- County Clerk Name
- State
- Status

10.5.2 Sorting County Clerks

County clerks can be sorted by:

- County Clerk Skey
- County Clerk Name
- POA Recorded Date
- POA Book No
- POA Page No
- POA Instrument No
- Pay To Name
- Attention To
- County Address1
- County Address2
- County State
- County Zip
- POA Sent For Recording Date
- Recording Fee Info
- Status
- Created By
- Create Date
- Maint By
- Maint Date
- First Page Rec Fee Amt
- Additional Page Rec Fee Amt
- Customer ID

10.5.3 Creating a County Clerk

To create a county clerk record:

Step 1. Click **New**. The **County Clerks** screen will display so the user can add a new county clerk.

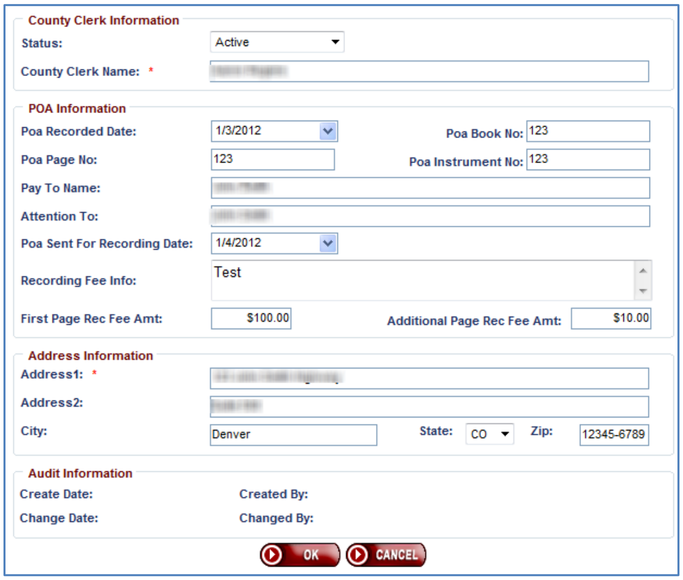

Figure 10-9: Creating a County Clerk

Step 2. Enter the following information

- Status
- County Clerk Name (required)
- POA Recorded Date
- POA Book No
- POA Page No
- POA Instrument No
- Pay To Name
- Attention To
- POA Sent For Recording Date
- Recording Fee Info
- First Page Rec Fee Amt
- Additional Page Rec Fee Amt
- Address1 (required)
- Address2

Step 3. Click **OK.**

10.5.4 Editing a County Clerk

You can edit all fields except county clerk skey, customer ID, and audit information.

Step 1. Click on a record in the table and the **County Clerk** screen will be displayed.

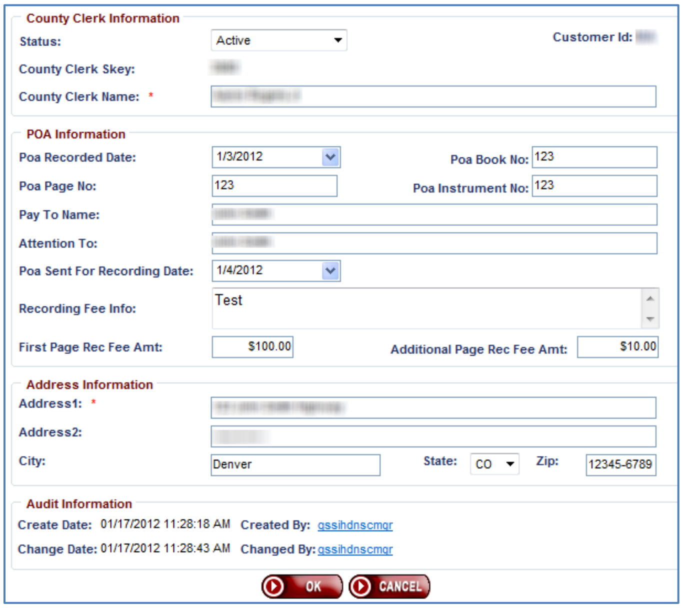

Figure 10-10: Editing a County Clerk

Step 2. Modify the information you need to edit and click the **OK** button. The **County Clerk** tab record table with the edited record will be displayed in the table.

10.6 Helpful Links Screen

This screen enables authorized users to add new links, or to edit or inactivate an existing link related to HUD and its reverse mortgage program. The links with active status and expiration date greater than the current system date are displayed on the Home page under the Helpful Links section. You cannot delete a link. A link that should no longer be used should be changed to Inactive.

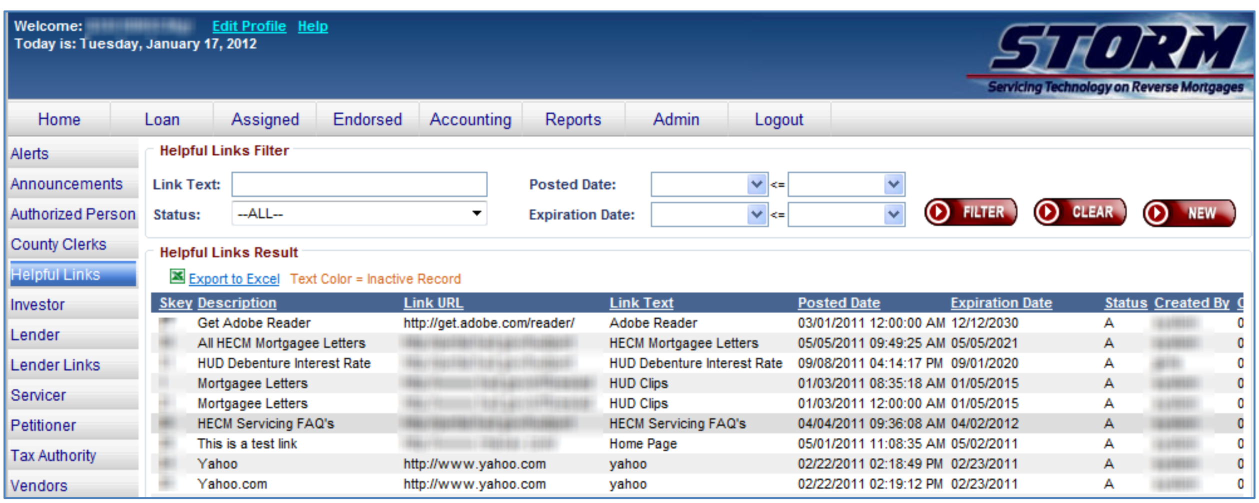

Figure 10-11: Helpful Links Screen

10.6.1 Filtering Helpful Links

You can filter Helpful Links by:

- Link Text
- Posted Date
- Status
- Expiration Date

10.6.2 Sorting Helpful Links

You can sort Helpful Links by:

- Skey
- Description
- Link URL
- Link Text
- Posted Date
- Expiration Date
- Status
- Created By
- Create Date
- Changed By
- Change Date

10.6.3 Creating Helpful Links

Step 1. Click **New.** The **Helpful Links** screen is displayed so the user can create a link.

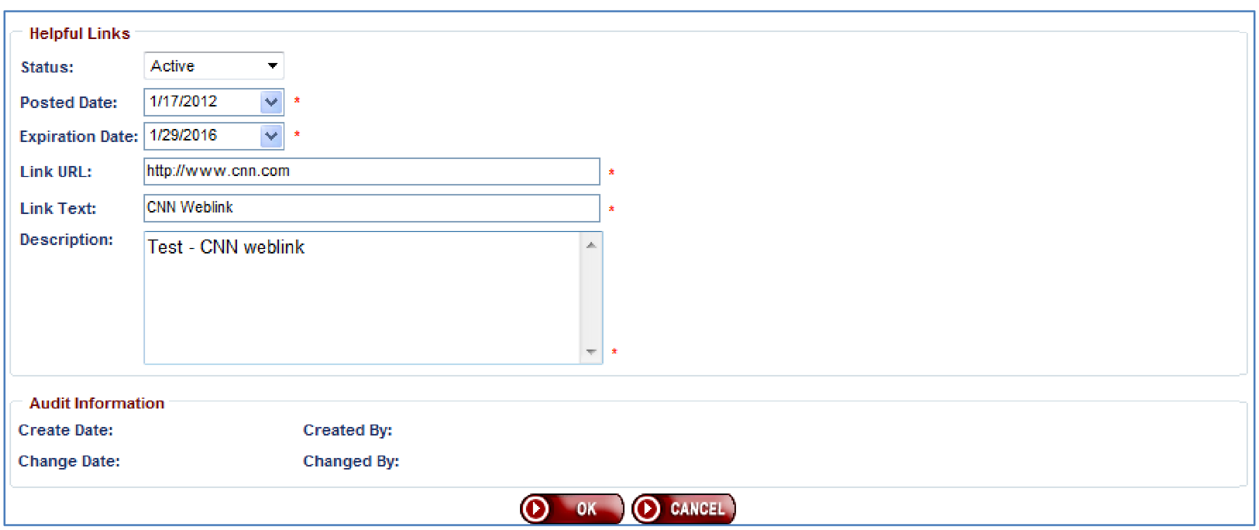

Figure 10-12: Creating a Helpful Link

Step 2. Enter the following information:

- Status
- Posted Date
- Expiration Date
- Link URL (required)

- Link Text (required)
- Description

Step 3. Click **OK**.

10.6.4 Editing a Helpful Link

You can edit all fields except for audit information.

Step 1. Click on a record in the table and the **Helpful Link** screen will be displayed.

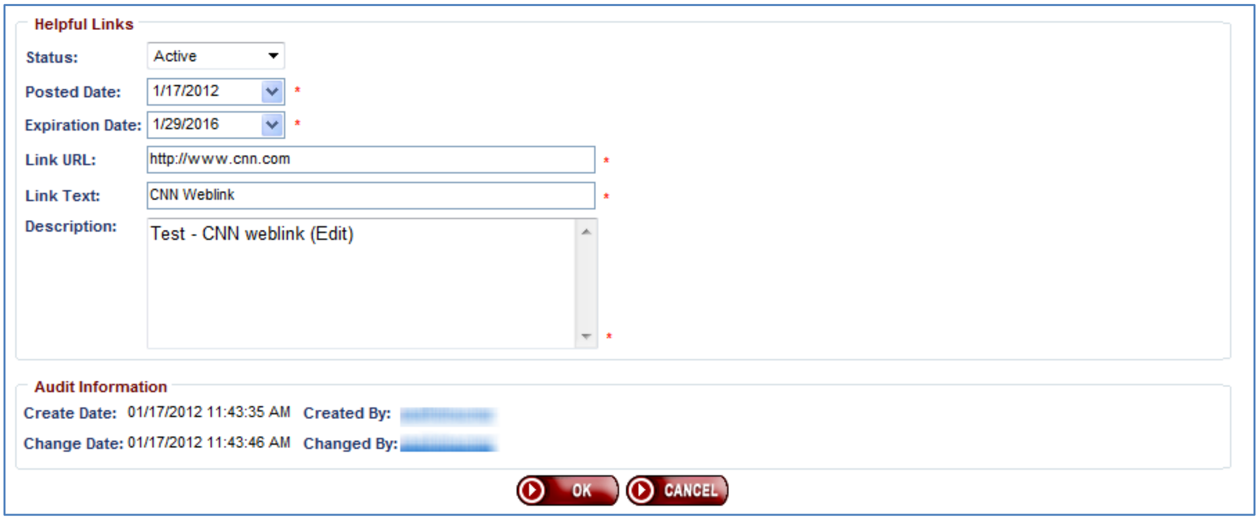

Figure 10-13: Editing a Helpful Link

Step 2. Modify the information you need to edit and click the OK button. The Helpful Link tab record table with the edited record will be displayed in the table.

10.7 Investor Screen

This screen allows the authorized user to add a new Investor, edit or inactivate an Investor. You cannot delete an investor. An investor that should no longer be used should be changed to Inactive.

Figure 10-14: Investors Screen

10.7.1 Filtering Investors

You can sort investors by:

- Name (Investor)
- State
- Mortgagee #
- Status

10.7.2 Sorting Investors

You can sort Investors by:

- Investor Skey
- Investor Tax ID
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Address2
- City
- State
- Zip
- Main Phone #
- Alt Phone #
- Fax #
- Email
- Website URL

10.7.3 Creating an Investor

To create an investor:

Step 1. Click **New**. The **Investor** screen is displayed so the user can add a new investor.

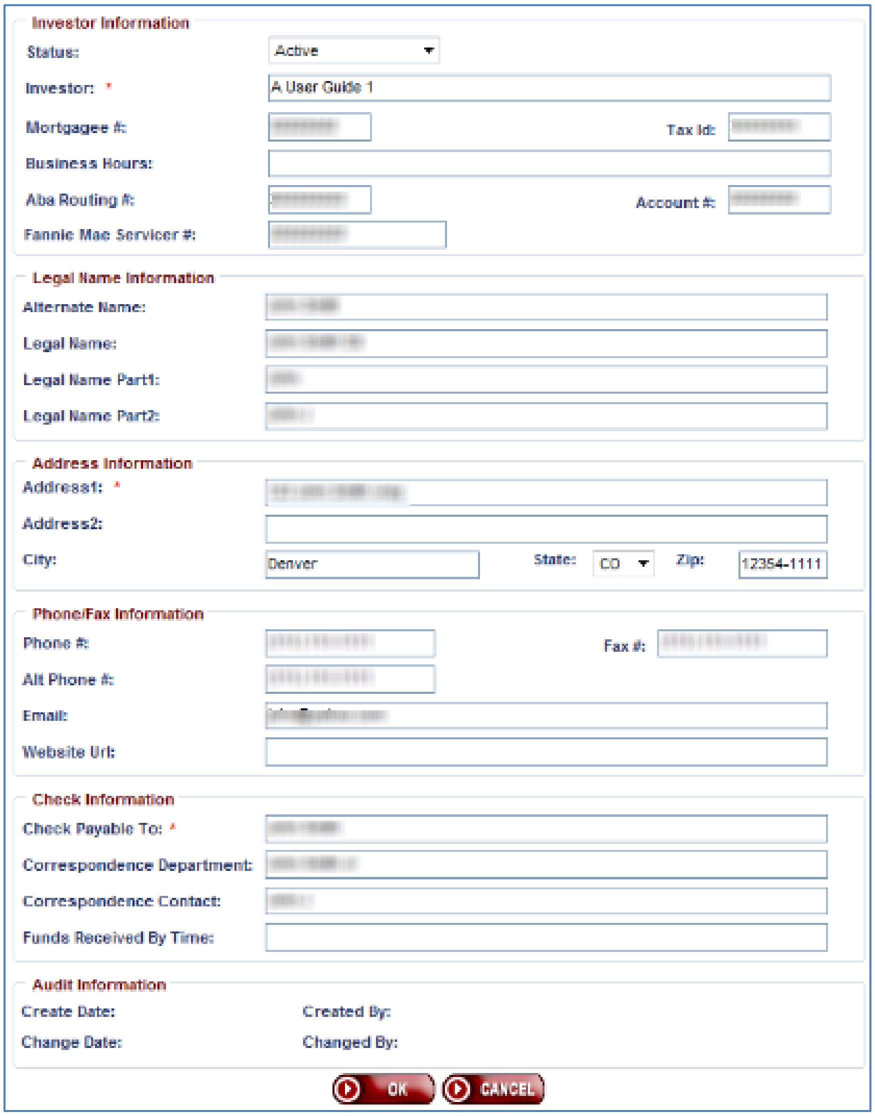

Figure 10-15: Creating an Investor

Step 2. Enter the following information:

- Status
- Investor (required)
- Mortgagee #
- Tax ID
- Business Hours
- ABA Routing #
- Account #
- Fannie Mae Servicer #
- Alternate Name
- Legal Name

- Legal Name Part1
- Legal Name Part2
- Address1(required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Email
- Website URL
- Check Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

Step 3. Click **OK.**

10.7.4 Editing an Investor

You can edit all fields except Investor Skey, Customer ID and audit information.

Step 1. Click on a record in the table and the **Investor** screen will be displayed.

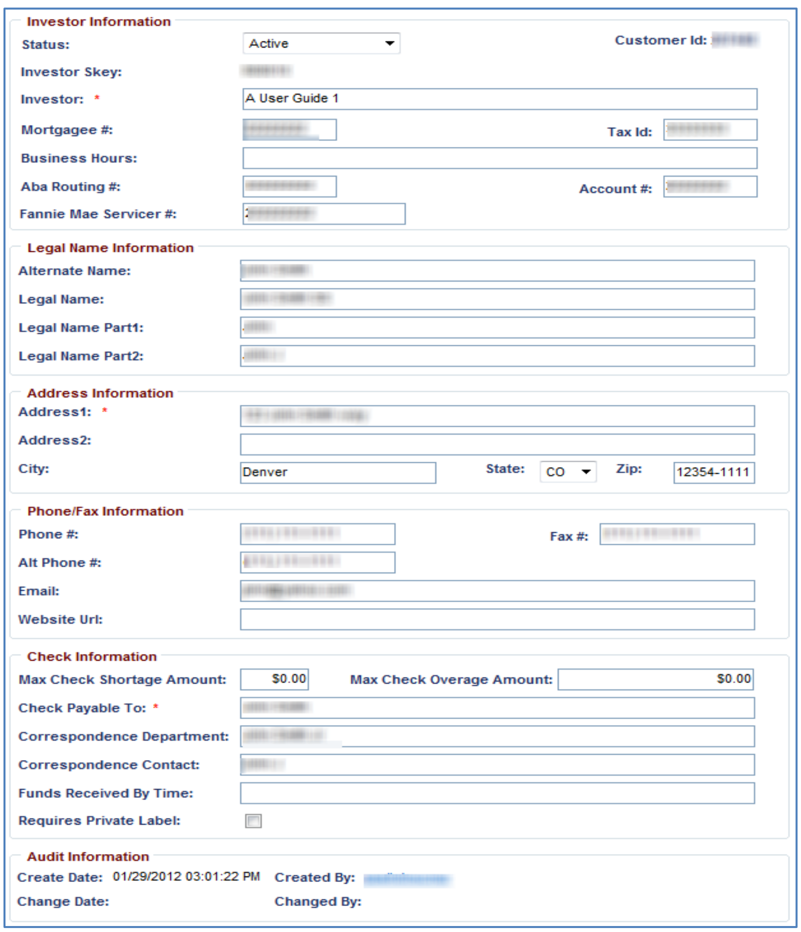

Figure 10-16: Editing an Investor

Step 2. Modify the information you need to edit and click the **OK** button. The **Investor** tab record table with the edited record will be displayed in the table.

10.8 Lender Screen

This screen enables authorized users to add a lender, or to edit or inactivate a Lender. You cannot delete a lender. A lender that should no longer be used should be changed to Inactive.

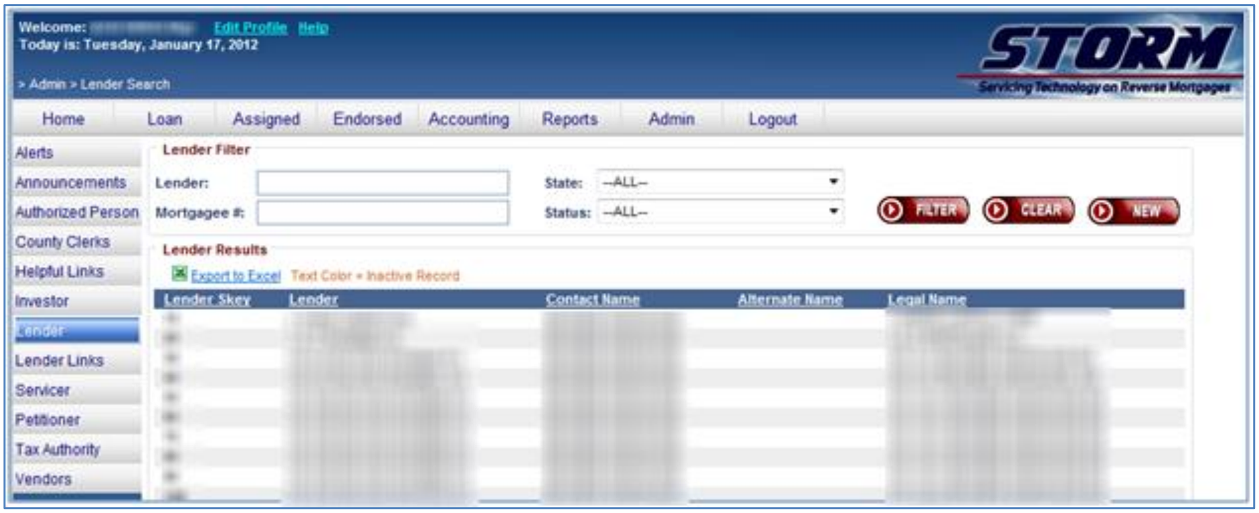

Figure 10-17: Lenders Screen

10.8.1 Filtering Lenders

You can filter lenders by:

- Lender
- State
- Mortgagee #
- Status

10.8.2 Sorting Lenders

You can sort lenders by:

- Lender Skey
- Lender Contact Name
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Address2
- City
- State Zip
- Main Phone #
- Alt Phone #
- Hearing Impaired #

- Fax #
- Email
- Website URL
- Check Payable To
- Correspondence Dept
- Correspondence Contact
- Funds Received By
- Time Status
- ABA Routing #
- Account #
- Mortgagee #
- Business Hours
- Create Date
- Created By
- Change Date
- Changed By

10.8.3 Creating a New Lender

To create a lender:

Step 1. Click **New**. The **Lender** screen is displayed so the user can add a new Lender.

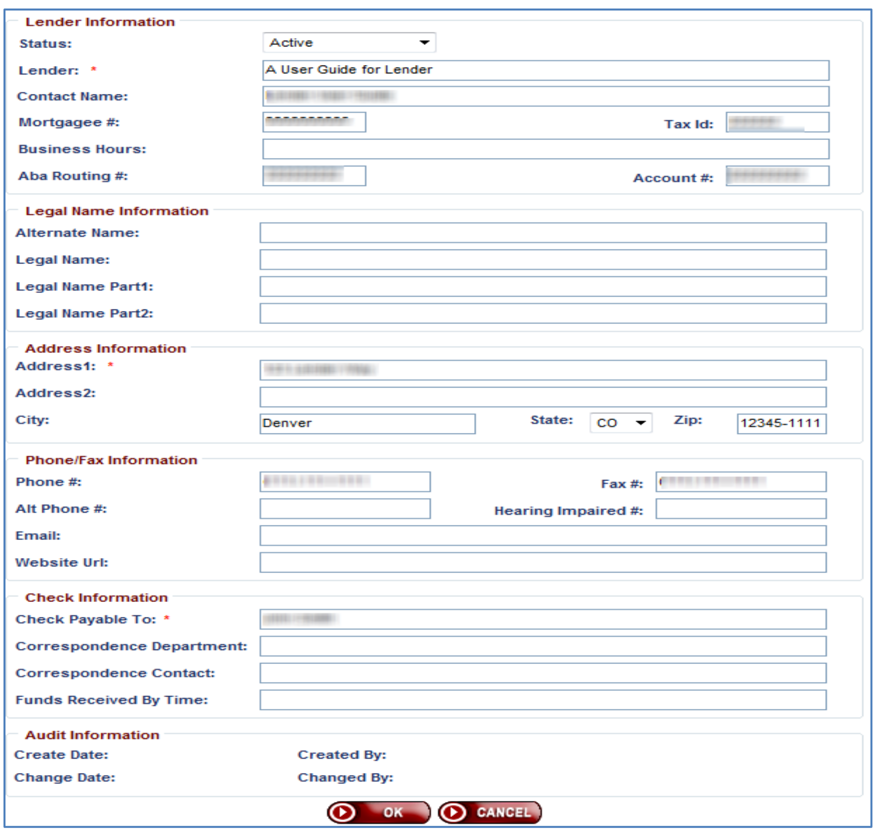

Figure 10-18: Creating a Lender

Step 2. Enter the following information:

- Lender Information
- Status
- Lender (required)
- Contact Name
- Mortgagee #
- Tax ID
- Business Hours
- Aba Routing #
- Account #
- Alternate Name
- Legal Name
- Legal Name Part1
- Legal Name Part2
- Address1 (required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Hearing Impaired #
- Email
- Website URL
- Check Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

10.8.4 Editing a Lender

You can edit all fields except Lender Skey and audit information.

Step 1. Click on a record in the table and the **Lender** screen will be displayed.

Figure 10-19: Editing a Lender

Step 2. Modify the information you need to edit and click the **OK** button. The **Lender** tab record table with the edited record will be displayed in the table.

10.9 Servicers Screen

This screen enables authorized users to add lenders, or edit or inactivate a lender. This screen also allows authorized user to set "No Pay" on the Servicer. Refer to Claims "No Pay" section for details. You cannot delete a servicer. A servicer that should no longer be used should be changed to Inactive.

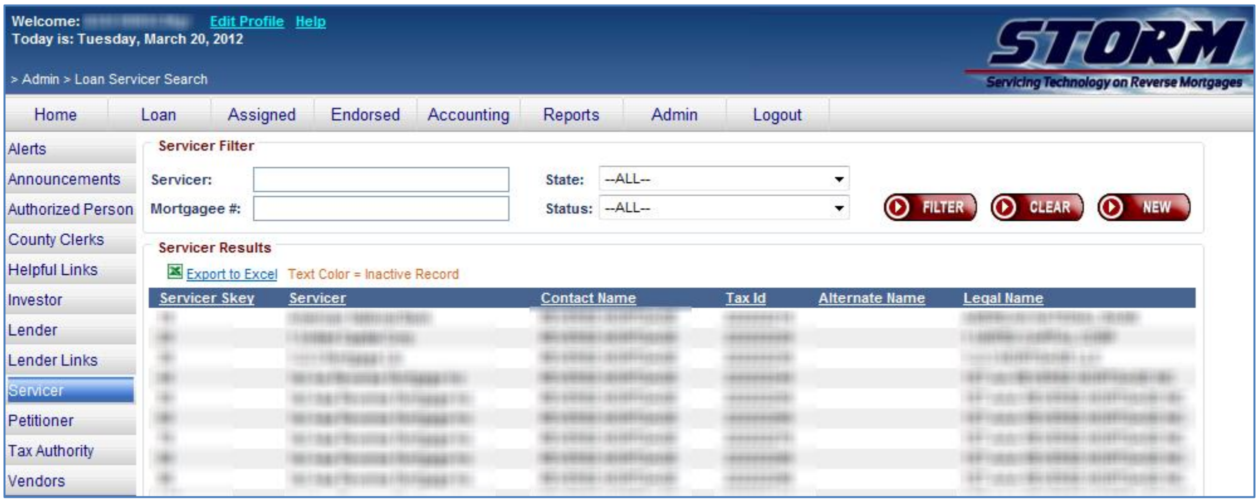

Figure 10-20: Servicer Screen

10.9.1 Filtering Servicers

Servicers can be filtered on one or more of following criteria:

- Name
- Mortgagee Number
- State
- Status

10.9.2 Sorting Servicers

Servicers can be sorted by:

- Servicer Skey
- Servicer Contact Name
- Tax ID
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Legal Name Part 2
- Address1
- Address2
- City
- State

- Zip
- Main Phone #
- Alt Phone #
- Hearing Impaired #
- Fax #
- Email
- Website URL
- Check Payable To
- Correspondence Dept
- Correspondence Contact
- Funds Received By Time
- Status
- ABA Routing #
- Account #
- Mortgagee #
- Business Hours
- Customer ID
- Create Date
- Created By
- Change Date
- Changed By

10.9.3 Creating a Servicer

To create a servicer:

Step 1. Click **New**. The **Servicer** screen is displayed so the user can add a new Servicer.

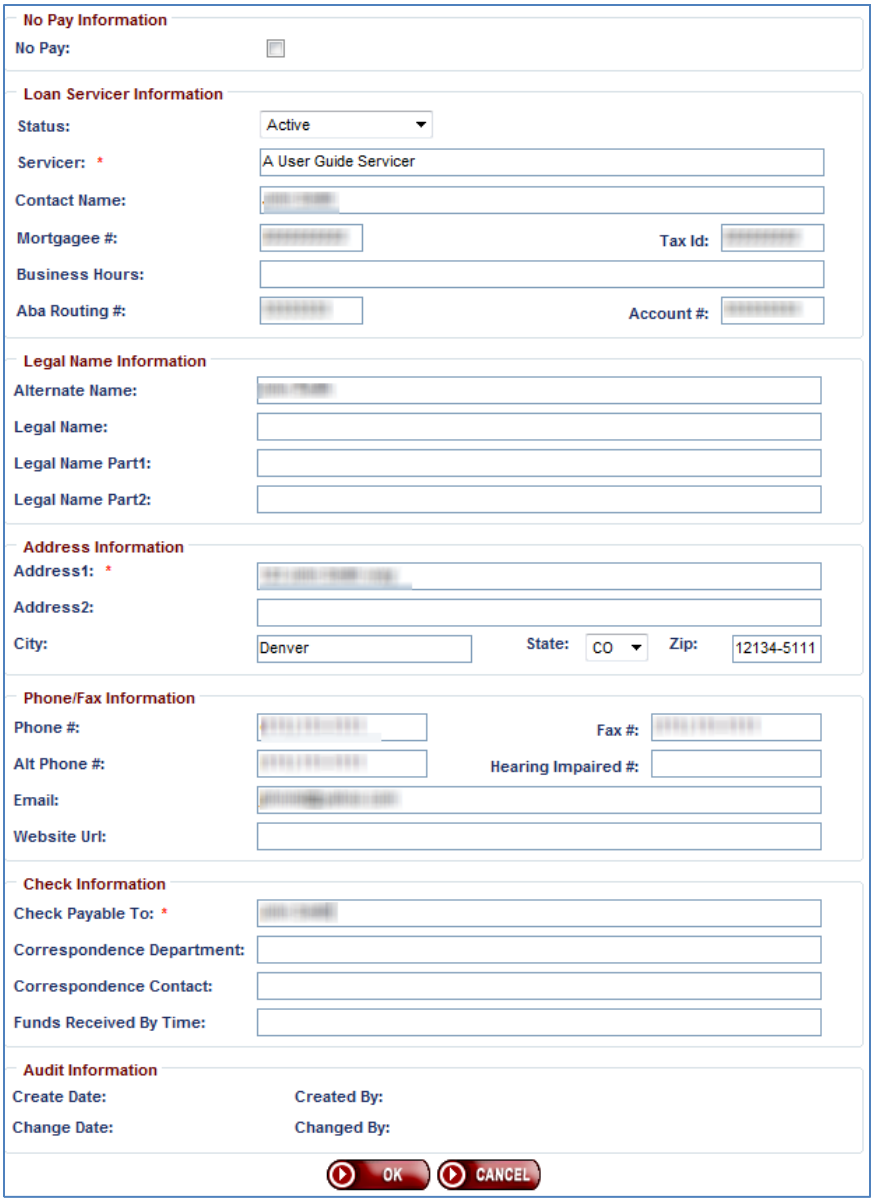

Figure 10-21: Creating a Servicer

Step 2. Enter the following information

- No Pay
- Status
- Servicer (required)
- Contact Name
- Mortgagee #
- Tax ID
- Business Hours

- Aba Routing #
- Account #
- Alternate Name
- Legal Name
- Legal Name Part1
- Legal Name Part2
- Address1 (required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Hearing Impaired #
- Email
- Website URL
- Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

10.9.4 Editing a Servicer

All fields can be edited except customer ID, servicer skey, and audit information. Note: Special permission is built to edit No Pay check box. Only authorized users with the edit No Pay permission can edit the checkbox.

Step 1. Click on a record in the table and the **Servicer** screen will be displayed.

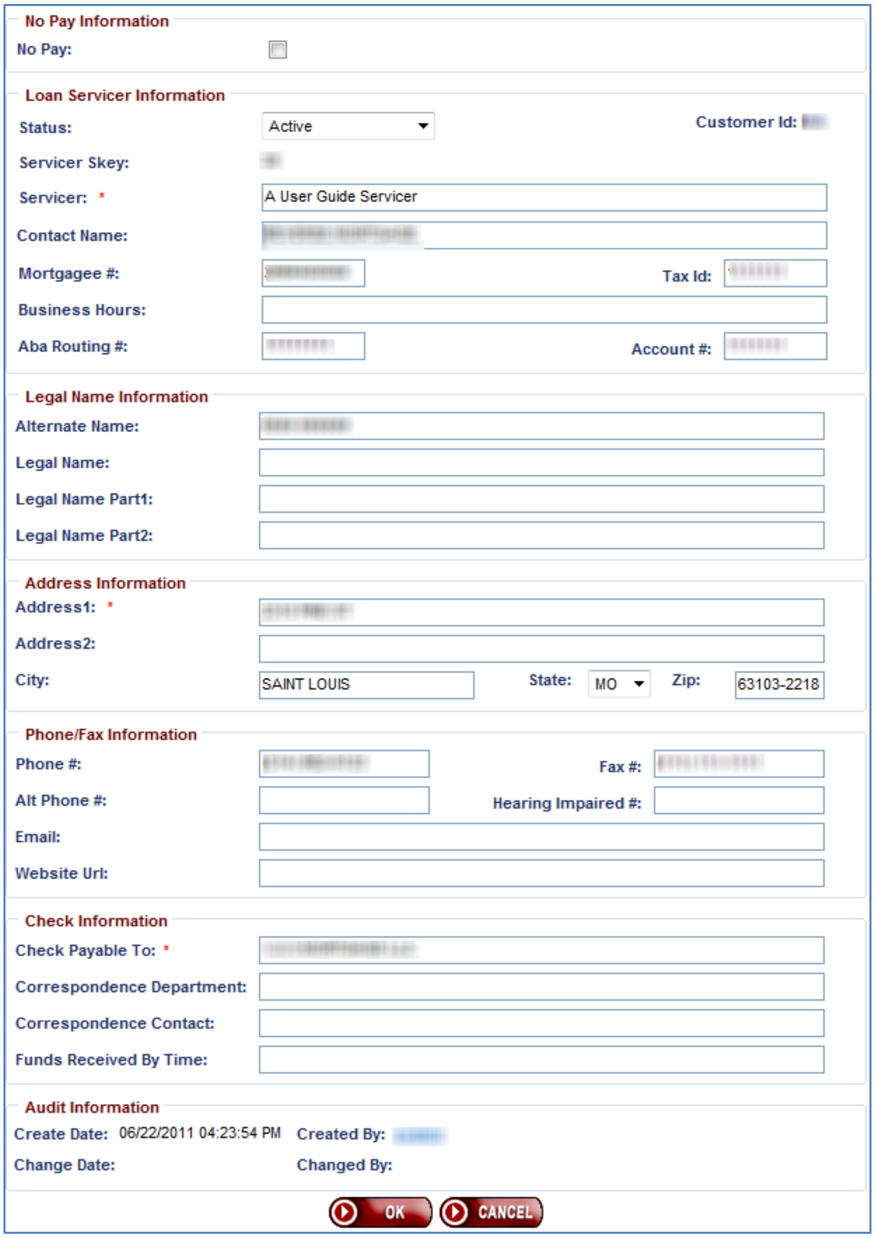

Figure 10-22: Editing a Servicer

Step 2. Modify the information you need to edit and click the **OK** button. The **Servicer** tab record table with the edited record will be displayed in the table.

10.10 Petitioners Screen

Petitioners are legal entities such as the Department of Justice. This screen enables authorized users to add a petitioner, or to edit or inactivate a petitioner. You cannot delete a petitioner. A petitioner that should no longer be used should be changed to Inactive.

Figure 10-23: Petitioners Screen

10.10.1 Filtering Petitioners

Petitioners can be filtered by one or more of three criteria:

- Name
- State
- Status

10.10.2 Sorting Petitioners

Petitioners can be sorted by:

- Status
- Petitioner
- Address1
- Address2
- City
- State
- Zip
- Phone #
- Fax #
- Create Date
- Created By
- Change Date
- Changed By
- User Information

10.10.3 Creating a Petitioner

To create a petitioner:

Step 1. Click **New.** The **Petitioner** screen will display so the user can add a new petitioner.

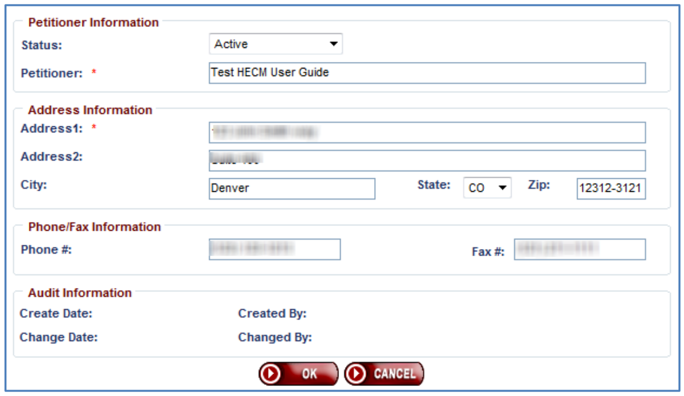

Figure 10-24: Creating a Petitioner

Step 2. Enter the following information:

- Status
- Petitioner (required)
- Address1(required)
- Address2
- City
- State
- Zip
- Phone #
- Fax #

Step 3. Click **OK**.

10.10.4 Editing a Petitioner

All fields except audit information and Petitioner Skey can be edited.

Step 1. Click on a record in the table and the **Petitioner** screen will be displayed.

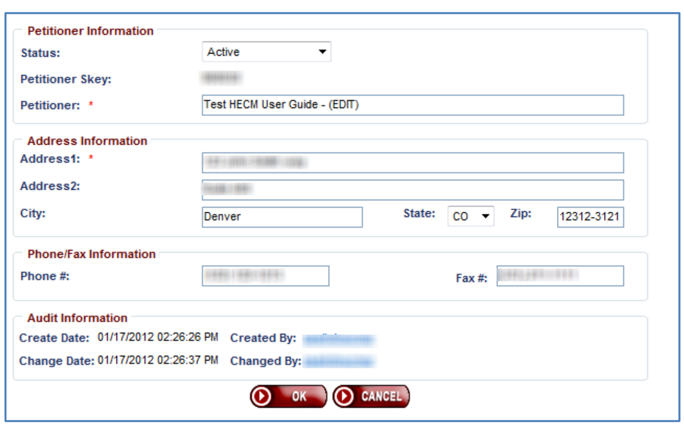

Figure 10-25: Editing a Petitioner

Step 2. Modify the information you need to edit and click the **OK** button. The **Petitioner** tab record table with the edited record will be displayed in the table.

10.11 Tax Authorities Screen

Tax Authorities are entities that are in line to collect taxes related to the property. This screen enables authorized users to add a tax authority, or to edit or inactivate a tax authority. You cannot delete a tax authority. A tax authority that should no longer be used should be changed to Inactive.

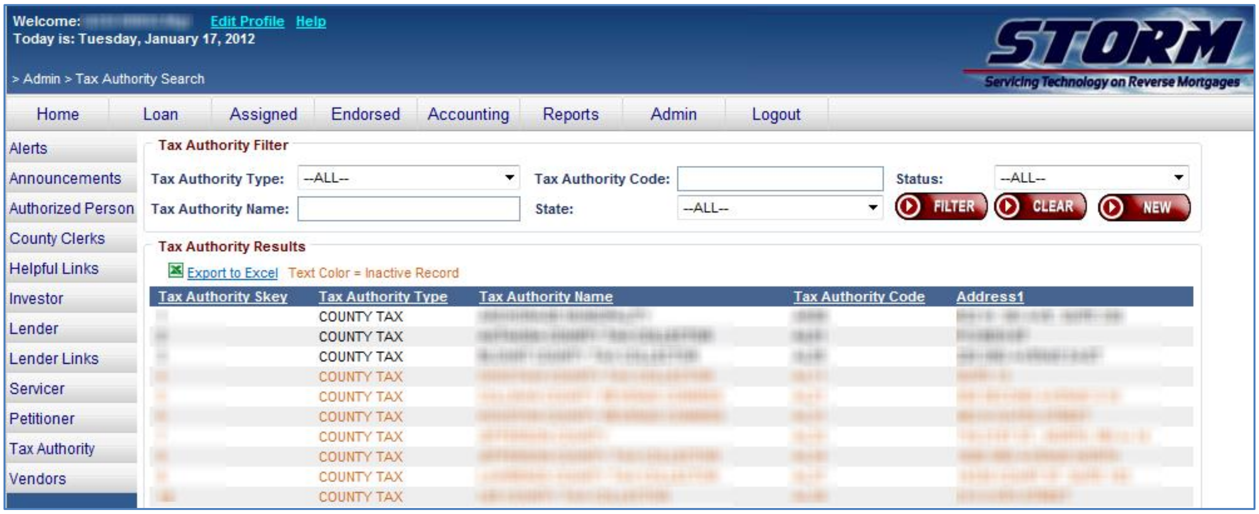

Figure 10-26: Tax Authority Screen

10.11.1 Filtering Tax Authorities

Tax Authorities can be filtered by one or more of five criteria:

- Type
- Name
- Code
- State
- Status

10.11.2 Sorting Tax Authorities

Tax authorities can be sorted by:

- Tax Authority Skey
- Tax Authority Type
- Tax Authority Name
- Tax Authority Code
- Address1
- Address2
- City
- State
- Zip
- Phone #
- Fax #
- Status
- Created By

- Create Date
- Maint By
- Maint Date

10.11.3 Creating a Tax Authority

Step 1. Click **New.** The **Tax Authority** screen will display so the user can add a new Tax Authority.

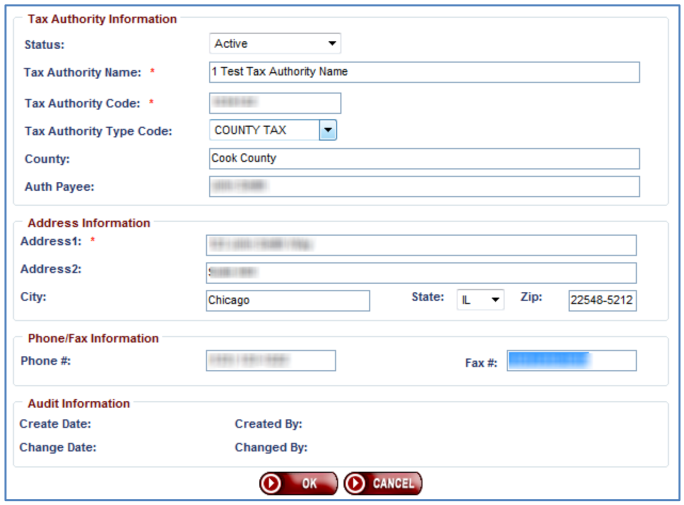

Figure 10-27: Creating a Tax Authority

Step 2. Enter the following information:

- Status
- Tax Authority Name(required)
- Tax Authority Code
- Tax Authority Type Code
- County
- Auth Payee
- Address1 (required)
- Address2
- City
- State
- Phone

Step 3. Click **OK.**

10.11.4 Editing a Tax Authority

All fields except for audit information and Tax Authority Skey can be edited.

Step 1. Click on a record in the table and the **Tax Authority** screen will be displayed.

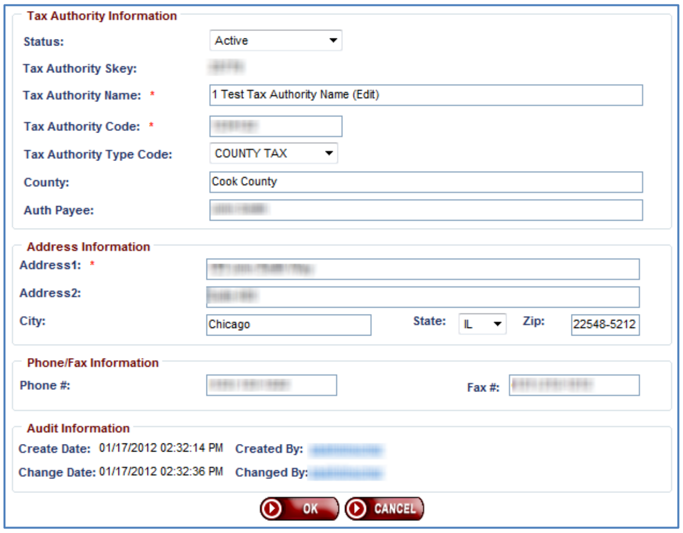

Figure 10-28: Editing a Tax Authority

Step 2. Modify the information you need to edit and click the **OK** button. The **Tax Authority** tab record table with the edited record will be displayed in the table.

10.12 Vendors Screen

This screen allows the authorized user to add new Vendors, edit or inactivate a Vendor. Vendors can be any contractors that provide a service on the mortgaged property (property management companies, appraisers, etc.). You cannot delete a vendor. A vendor that should no longer be used should be changed to Inactive**.**

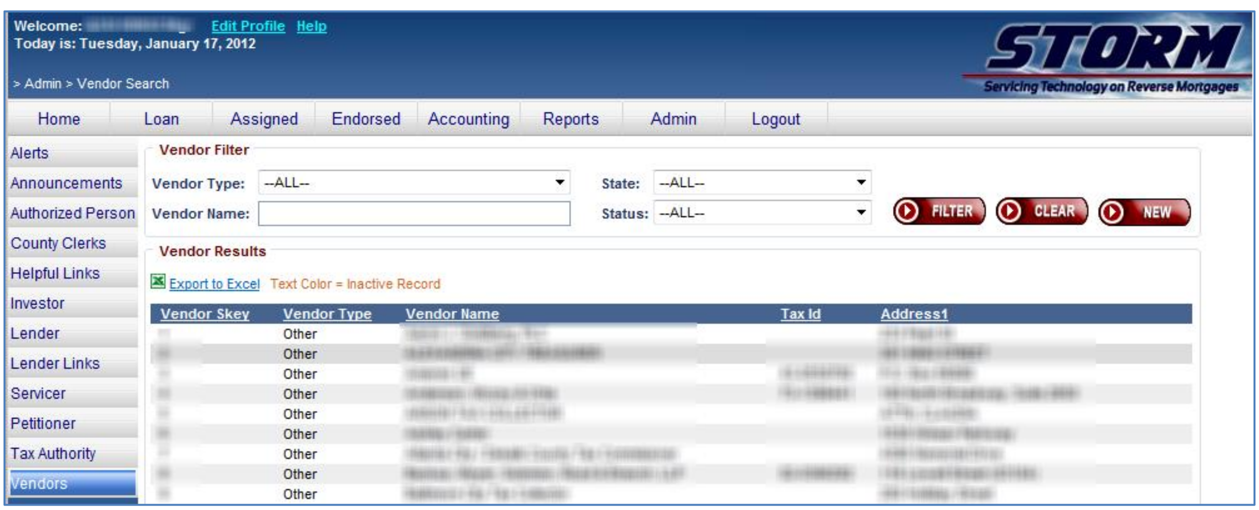

Figure 10-29: Vendors Screen

10.12.1 Filtering Vendors

Vendors can be filtered on one or more of four criteria:

- Type
- Name
- State
- Status

10.12.2 Sorting Vendors

Vendors can be sorted by:

- Status
- Vendor Name
- Servicer
- Vendor Type
- Department
- Contact Name
- Tax ID
- Address1
- Address2
- City
- State
- Zip
- Phone #
- Fax #
- Email
- Website URL
- License #
- License State

10.12.3 Creating a Vendor

To create a vendor:

Step 1. Click **New**. The **Vendor** screen will display so the user can add a new Vendor.

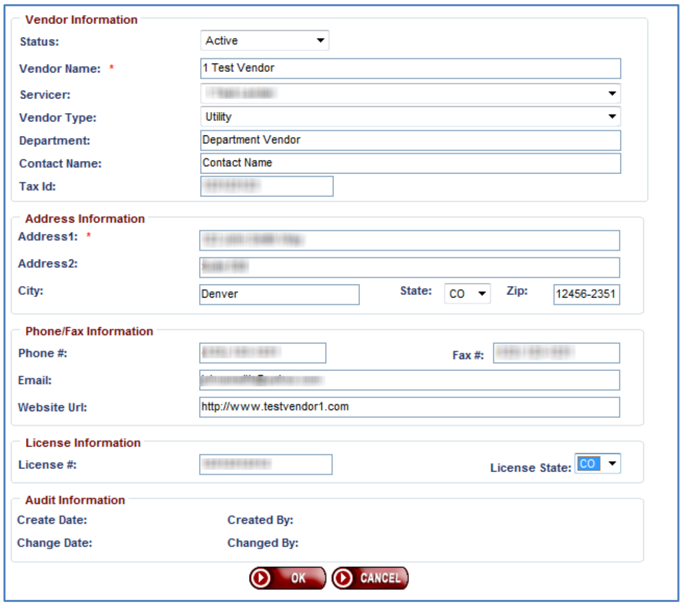

Figure 10-30: Creating a Vendor

Step 2. Enter the following:

- Status
- Vendor Name (required)
- Servicer
- Vendor Type
- Department
- Contact Name
- Tax ID
- Address1 (required)
- Address2
- City
- State
- Zip
- Phone #
- Fax #
- Email
- Website URL
- License #
- License State

Step 3. Click **OK**.

10.12.4 Editing an Existing Vendor

All fields except for audit information and Customer ID can be edited.

Step 1. Click on a record in the table and the edit alerts screen will be displayed.

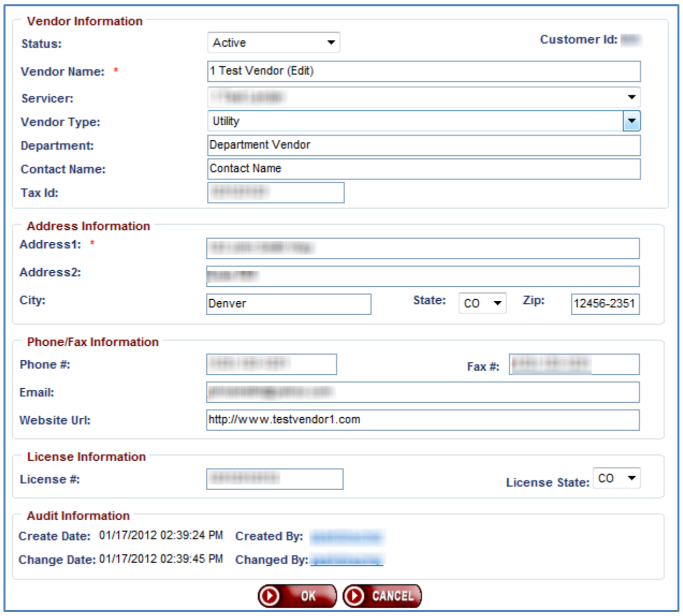

Figure 10-31: Editing an Existing Vendor

Step 2. Modify the information you need to edit and click the **OK** button. The **Vendor** tab record table with the edited record will be displayed in the table.