

Order an Appraisal

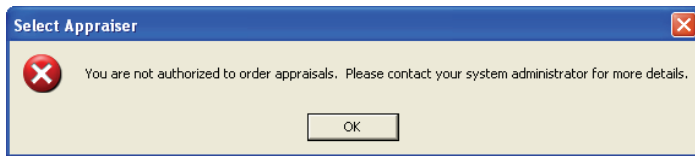
When you order an appraisal, the available ordering options will depend on how your administrator has configured the ordering process. Additionally, your administrator can configure Encompass360 so that you will have different appraisal ordering processes for different types of loans. For example conventional, you may be able to select your own appraiser for a conventional loan, but a request for an appraisal for an FHA loan might be sent to an internal order desk, which selects the appraiser and submits the loan.

Identify Your Appraisal Ordering Configuration

Review the descriptions and screen shots below to identify the ordering process that applies to you. Detailed instructions for ordering appraisals using each configuration are provided later in this document.

Not Authorized

The following message displays if you do not have permission to order an appraisals.

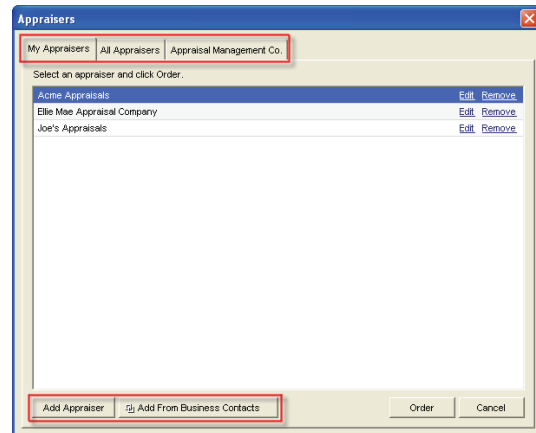


Select Your Own Appraiser

You can select a provider from a list of appraisers and AMCs that have been set up by your administrator. Or you can add your own providers to the **My Appraisers** tab.

What to look for:

- The **Add Appraiser** and **Add From Business Contacts** buttons are visible on the lower-left corner of the window.
- You are able to select providers from the **My Appraisers** tab, the **Appraisers** tab, and the **Appraisal Management Co.** tab.

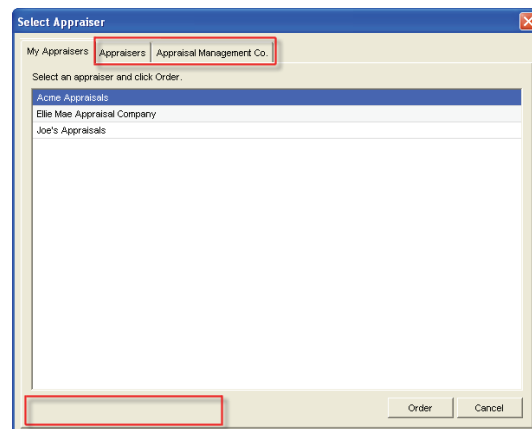


Select Approved Appraisers Only

You can select a provider from a list of approved appraisers and AMCs set up by the administrator. You cannot add your own providers to the list.

What to look for:

- The **Add Appraiser** and **Add From Business Contacts** buttons are not visible on the lower-left corner of the window.
- You are able to select providers from the **My Appraisers** tab.
- The **All Appraisers** and **Appraisal Management Co.** tabs display a message stating that you are not authorized to add a partner.



Automated Ordering

You do not see a list of providers and have no input into the appraiser selection. The order is sent to an appraiser who is selected randomly or in rotating order from a list created by your administrator.

What to look for:

- When you order an appraisal, the Order Appraisal window opens.
- Your name, email address, and phone number display on the **From** section of the window.
- A message on the **To** section of the window explains that the order will be routed to an appraiser who has been set up by your administrator.

Order Appraisal

From
Name: Dennis Mishkin
Email: dmishkin@email.com
Phone: 555-555-5555

To
This request will be randomly routed to an appraiser that has been setup by your system administrator.

Appraisal Info
Appraisal Type: 1004D
Due Date: 04/22/2009

Message
Type an email message for your appraisal here. This message will also be recorded in the Document Tracking Comments.

Order Details
Borrower: Ackerley, Joseph
Property Address: 1234 Five Street
Gloucester, MA 01930
Loan Purpose: Purchase
Property Type: Detached
Legal Description: See preliminary title report
Loan Number: 0802EM000050
Loan Type: Conventional
Lien Position: FirstLien
Property Will Be: PrimaryResidence
Target Lender: Ellie Mae, Inc.
Contact for Entry: [Dropdown]
Contact Name: [Text]
Home Phone: [Text]
Business Phone: [Text]
Mobile Phone: [Text]
Special Instructions: [Text Area]

Send Order Cancel

Internal Order Desk

When you submit an order, you do not see a list of providers. An email notification is sent to an internal order desk in your company, which is responsible for submitting the order to an approved appraiser or AMC.

What to look for:

- When you order an appraisal, the Order Desk window displays.

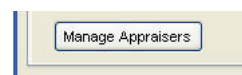
Order Desk

Order Details
Borrower: Ackerley, Joseph
Property Address: 1234 Five Street
Gloucester, MA 01930
Loan Purpose: Purchase
Property Type: Detached
Legal Description: See preliminary title report
Loan Number: 0802EM000050
Loan Type: Conventional
Lien Position: FirstLien
Property Will Be: PrimaryResidence
Contact for Entry: [Dropdown]
Contact Name: [Text]
Home Phone: [Text]
Business Phone: [Text]
Mobile Phone: [Text]
Special Instructions: [Text Area]

Send Order Cancel

Manage Appraisers

If your administrator has given you permission to manage the appraisers list for the Approved Appraisers Only, Automated Order, or Internal Order Desk options, a Manage Appraisers button will display in the lower-left corner of the window when you order an appraisal.



Order an Appraisal

There are two ways to order an appraisal:

- Click the **Services** tab, and then click **Order Appraisal**.
- Open the Borrower Summary form, and then click the **Order Appraisal** button.

Depending on the configuration created by your administrator, complete one of the following procedures to submit an order.

To Select Your Own Appraisers:

1. When the Appraisers window opens, select an appraiser from the **My Appraisers** tab, and then click **Order**.
 - Or, first click **Add Appraiser** to add the Name, Email Address, and Phone Number of a new appraiser.
 - Or, first click **Add From Business Contacts** to open the Business Contacts tool to add appraisers to your My Appraisers list.
 - Or, select an appraiser from the Appraiser Directory on the **All Appraisers** tab, and then click **Order**.
 - Or, select an AMC from the **Appraisal Management Co.** tab and then click **Order**.

The screenshot shows the 'Appraisers' window with three tabs: 'My Appraisers', 'All Appraisers', and 'Appraisal Management Co.'. The 'My Appraisers' tab is active, displaying a table with the following data:

Select an appraiser and click Order.	
Acme Appraisals	More info Remove
Elle Mae, Inc.	More info Remove
Joe's Appraisals	More info Remove

At the bottom of the window, there are four buttons: 'Add Appraiser', 'Add From Business Contacts', 'Order', and 'Cancel'.

2. On the Order Appraisal window, complete the order details.
3. Enter information for the Contact for Entry who will provide the appraiser with access to the property.
 - Click the **Business Contacts** button to open the Business Contacts tool to select a real estate agent.
4. Click **Attachment** to attach a document from your computer or the Encompass360 eFolder.
5. Click **Send Order**.
 - The appraiser is notified via email that an order has been sent.

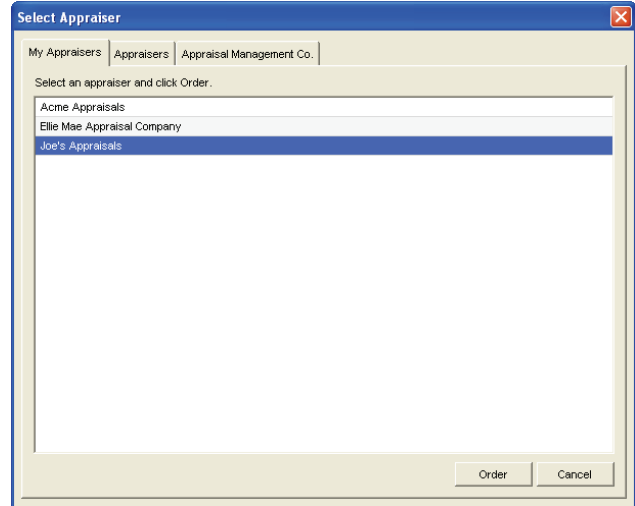
The screenshot shows the 'Order Appraisal' window with the following sections:

- From:** Name: Dennis Mishkin, Email: dmishkin@gmail.com, Phone: 555-555-5555
- To:** Name: Joe's Appraisals, Email: joesappraisals@email.com, Phone: 555-555-5555
- Appraisal Info:** Appraisal Type: 1004D, Due Date: 04/22/2009
- Order Details:** Borrower: Ackerley, Joseph, Property Address: 1234 Five Street Gloucester, MA 01930, Loan Purpose: Purchase, Property Type: Detached, Legal Description: See preliminary title report, Loan Number: 0802EM000050, Loan Type: Conventional, Lien Position: FirstLien, Property Will Be: PrimaryResidence, Lot Size: [empty], Target Lender: Elle Mae, Inc.
- Contact for Entry:** [empty], [Add]
- Contact Name:** [empty]
- Home Phone:** [empty]
- Business Phone:** [empty]
- Mobile Phone:** [empty]
- Special Instructions:** [empty]
- Message:** Type an email message for your appraisal here. This message will also be recorded in the Document Tracking Comments.
- Attachment:** [empty]
- Attachment:** [empty]

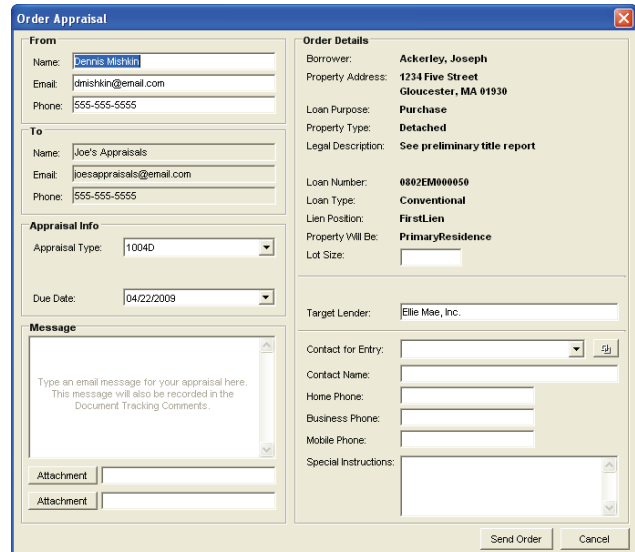
At the bottom right, there are two buttons: 'Send Order' and 'Cancel'.

To Select Approved Appraisers Only:

1. When the Appraisers window opens, select an appraiser from the **My Appraisers** tab, and then click **Order**.

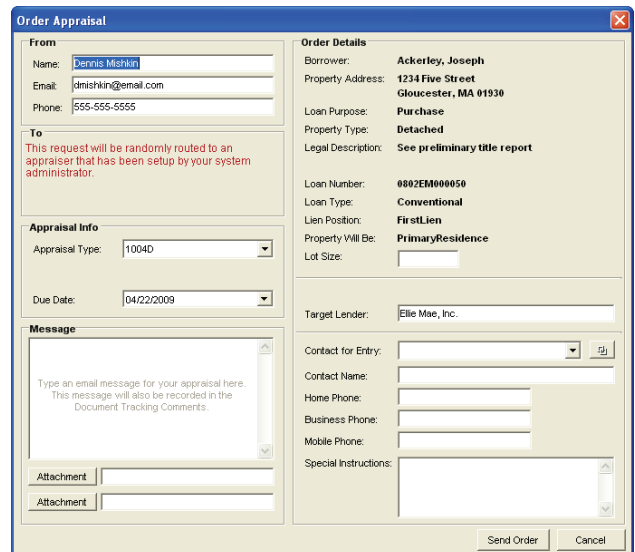


2. On the Order Appraisal window, complete the order details.
3. Enter information for the Contact for Entry who will provide the appraiser with access to the property.
 - Click the **Business Contacts** button to open the Business Contacts tool to select a real estate agent.
4. Click **Attachment** to attach a document from your computer or the Encompass eFolder.
5. Click **Send Order**.
6. The appraiser is notified via email that an order has been sent.



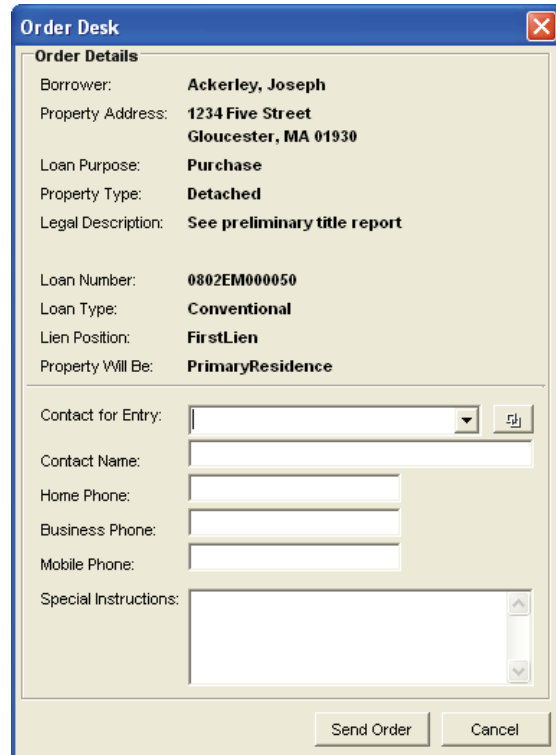
To Order Using Automated Ordering:

1. When the Order Appraisal window opens, complete the order details.
2. Enter information for the Contact for Entry who will provide the appraiser with access to the property.
 - Click the **Business Contacts** button to open the Business Contacts tool to select a real estate agent.
3. Click **Attachment** to attach a document from your computer or the Encompass eFolder.
4. Click **Send Order**.
 - The appraiser is notified via email. A message confirms that the order was submitted.



To Submit a Request to the Internal Order Desk:

1. When the Order Desk window opens, enter information for the Contact for Entry, who will provide the appraiser with access to the property.
 - Click the **Business Contacts** button to open the Business Contacts tool to select a real estate agent.
2. Click **Send Order**.
3. The order desk is notified via email that an order has been sent.



The screenshot shows a software window titled "Order Desk" with a close button in the top right corner. The window is divided into two main sections. The top section, titled "Order Details", contains the following information: Borrower: **Ackerley, Joseph**; Property Address: **1234 Five Street Gloucester, MA 01930**; Loan Purpose: **Purchase**; Property Type: **Detached**; Legal Description: **See preliminary title report**; Loan Number: **0802EM000050**; Loan Type: **Conventional**; Lien Position: **FirstLien**; Property Will Be: **PrimaryResidence**. The bottom section contains input fields for "Contact for Entry" (a dropdown menu with a search icon), "Contact Name", "Home Phone", "Business Phone", "Mobile Phone", and "Special Instructions" (a text area with scrollbars). At the bottom right of the window are two buttons: "Send Order" and "Cancel".