

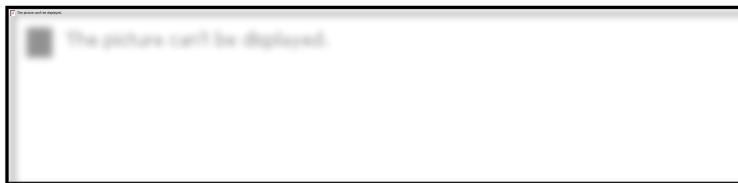


## Contents – Loan Officer/Loan Processor

- 1. Login**
  - 1.1 Forgotten Password
  
- 2. New Appraisal Order**
  - 2.1 File Information
  - 2.2 Company Information
  - 2.3 Borrower Information
  - 2.4 Property Information
  - 2.5 Appraisal Information
  - 2.6 Fee
  - 2.7 Payment Information
  - 2.8 Dates
  - 2.9 Attachments
  - 2.10 Notes
  
- 3. Completed Orders**
  - 3.1 Associated Services
    - 3.1(a) Order Appraisal Review
    - 3.1(b) Order Final Inspections
    - 3.1(c) Reconsideration of Value
    - 3.1(d) Order Recertification of Value
  
- 4. Appraisal Dashboard**
  - 4.1 All Pending Orders
  - 4.2 Appraiser Dashboard
  - 4.3 Order Display
    - 4.3(a) Send Message
    - 4.3(b) File ID
    - 4.3(c) Appraisal Form
    - 4.3(d) Company
    - 4.3(e) Loan #
    - 4.3(f) Docs
    - 4.3(g) Inspection
    - 4.3(h) Due Date
    - 4.3(i) Address
    - 4.3(j) Borrower
    - 4.3(k) Loan Officer/Processor
    - 4.3(l) Status

## 1 Login

Login to ValuTrac using your email address and password.



- 1.1 If you have forgotten your password, click the [Forgot Your Password](#) link under the login box.

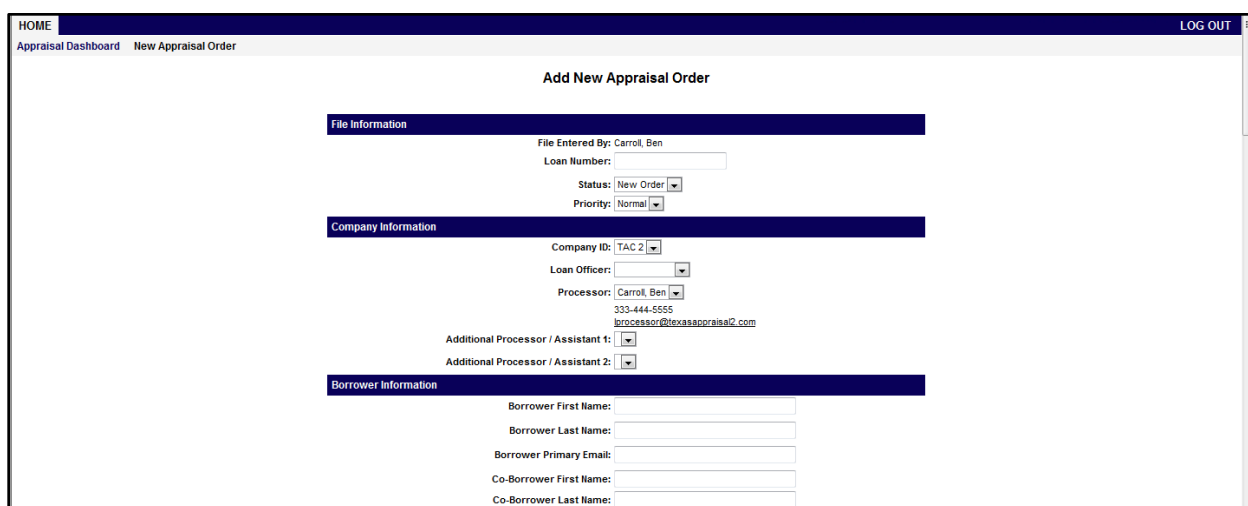


A new box will appear, enter your email address and you will receive an email containing a link to reset your password.



## 2 New Appraisal Order

To assign a New Appraisal Order, click the New Appraisal Order tab, the Add New Appraisal screen will open. In the Add New Appraisal Order screen you will need to complete the following information: (For instructional purposes, the Add New Appraisal screen will be split into multiple screen shots)



### 2.1 File Information

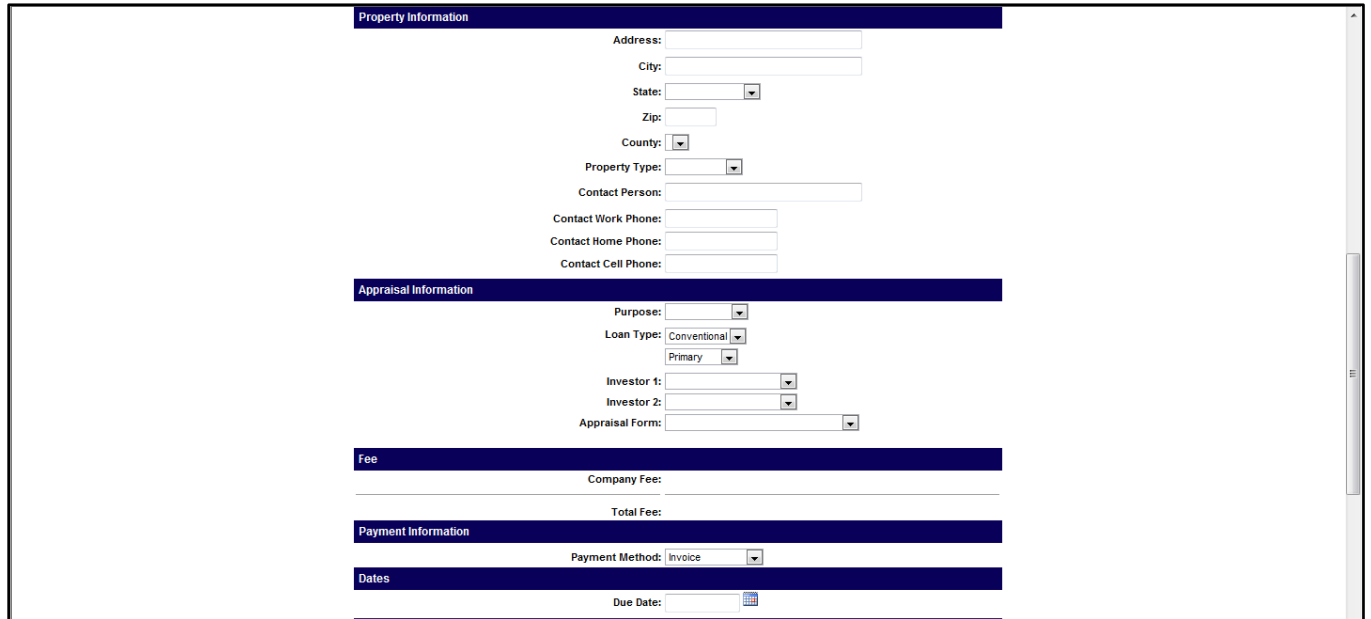
Enter the Loan Number and select the Status and Priority from the drop down arrow options.

### 2.2 Company Information

In this section you may to select the Loan Officer, Loan Processor and if necessary, any additional contacts. Those users selected will then receive email updates at the various status changes throughout the process.

### 2.3 Borrower Information

In this section, you will need to complete borrower's First Name, Last Name, and Email. If necessary, enter the Co-Borrower's First Name and Last Name.



The screenshot displays a web-based form with the following sections and fields:

- Property Information:** Address, City, State (dropdown), Zip, County (dropdown), Property Type (dropdown), Contact Person, Contact Work Phone, Contact Home Phone, Contact Cell Phone.
- Appraisal Information:** Purpose (dropdown), Loan Type (dropdown with 'Conventional' selected), Primary (dropdown), Investor 1 (dropdown), Investor 2 (dropdown), Appraisal Form (dropdown).
- Fee:** Company Fee, Total Fee.
- Payment Information:** Payment Method (dropdown with 'Invoice' selected).
- Dates:** Due Date (calendar icon).

2.4 Property Information

Enter all of the Property information, including the Contact Person and his/her contact phone numbers.

2.5 Appraisal Information

Enter the appraisal information by selecting the Purpose, Loan Type, and the Appraisal Form, from the drop down options.

2.6 Fee

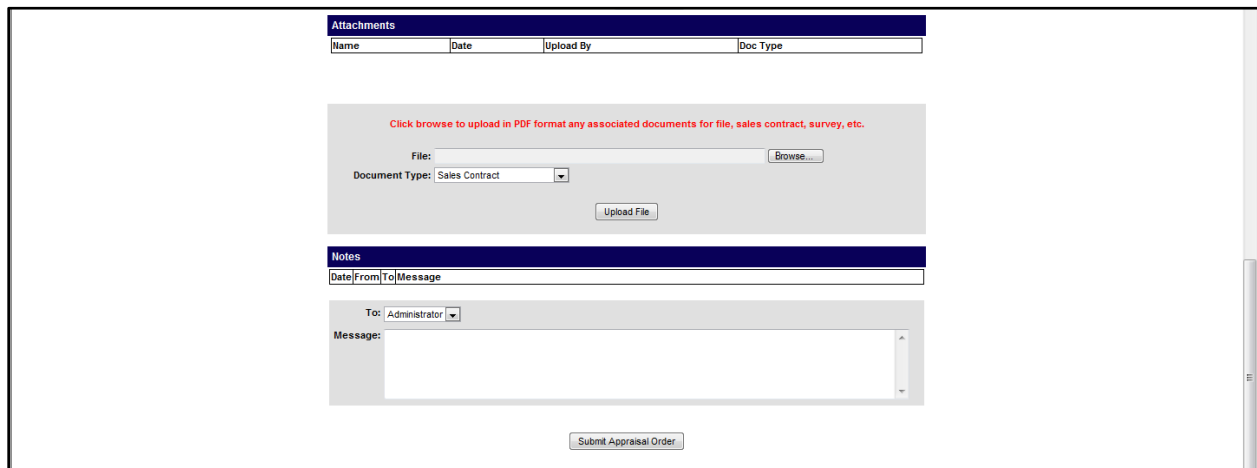
All calculated fees will populate to this section.

2.7 Payment Information

Select the Payment Method from the drop down options, complete as needed.

2.8 Dates

Enter the appraisal Due Date.



The screenshot displays a web interface with two main sections: Attachments and Notes.

**Attachments Section:**

- A table header with columns: Name, Date, Upload By, and Doc Type.
- A red instruction: "Click browse to upload in PDF format any associated documents for file, sales contract, survey, etc."
- A "File:" input field with a "Browse..." button.
- A "Document Type:" dropdown menu currently set to "Sales Contract".
- An "Upload File" button.

**Notes Section:**

- A table header with columns: Date, From, To, and Message.
- A "To:" dropdown menu currently set to "Administrator".
- A "Message:" text area for entering notes.

At the bottom of the page, there is a "Submit Appraisal Order" button.

## 2.9 Attachments


Any attachments associated with the order can be uploaded here. Click the *Browse* button, attach the document in the appropriate format, and click the *Upload File* button to upload the document. In some cases, such as with a Purchase transaction, the Sales Contract may be required before the order can be submitted.

## 2.10 Notes

If you wish to add a note or send a message to the Administrator, they can be added in this box. Type your note and click *Add Note*.

When the New Appraisal Order is completed, click the *Submit Appraisal Order* button at the bottom of the page.

### 3 Completed Orders

Under the “Company Dashboard”, click on **Completed**, all of the completed orders will be displayed. In the Completed Orders screen you will be able to download documents by clicking  Download Docs. The Appraisal Order Detail will open at the Attachments section.



COMPLETED ORDERS													
Send	Msg	File ID	Appraisal Form	Company	Loan #	Docs	Rec	Insp Due	Address	Borrower	Loan Processor	Status	Associated Services
Message	110308005	FNMA 1004 - URAR	TAC 2	2600458	Download Docs	3/08/11	5/01/11	333 Valley Ridge Lewisville, TX 75067	John, Karen	Carroll, Ben	Completed	<ul style="list-style-type: none"> <li>• Order Appraisal Review</li> <li>• Order Final Inspection</li> <li>• Reconsideration of Value</li> <li>• Order Recertification of Value</li> </ul>	

#### 3.1 Associated Services

In the Completed Orders screen you will be able to order additional services, by clicking on the service needed. Associated Services include: Order Appraisal Review, Order Final Inspection, Reconsideration of Value and Order Recertification of Value.

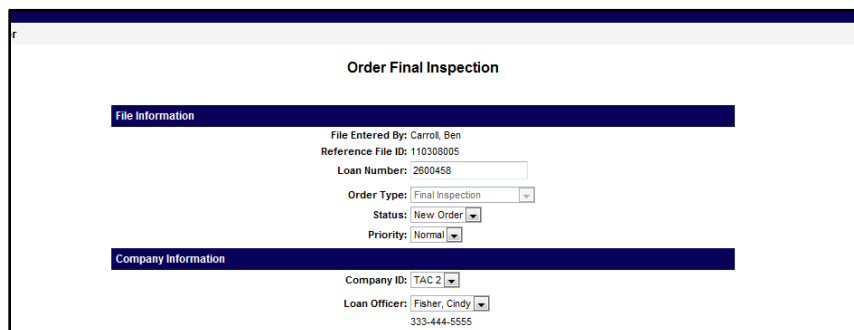
##### 3.1(a) Order Appraisal Review -

Click on *Order Appraisal Review* from either the Completed Orders screen or by opening the Appraisal Order Detail. The Order Appraisal Review screen will open. The Order Type will automatically be selected as an Appraisal Review. Click on the *Submit Appraisal Order* button at the bottom of the page to place the Order Review.



3.1(b) Order Final Inspection -

Click on *Order Final Inspection* from either the Completed Orders screen or by opening the Appraisal Order Detail. The Order Final Inspection screen will open. The Order Type will automatically be selected as a Final Inspection. Click on the *Submit Appraisal Order* button at the bottom of the page to order the Final Inspection.



3.1(c) Reconsideration of Value -

Click on *Reconsideration of Value* from either the Completed Orders screen or by opening the Appraisal Order Detail. The Reconsideration of Value screen will open. Enter the reason in the “Reconsideration of Value” box and any additional Market Data in the corresponding box. Click on the *Submit* button at the bottom of the page to request a Reconsideration of Value.



**Reconsideration of Value**

I would like to request a "Reconsideration of Value" on the below referenced property.

**Subject Property**

Address: 333 Valley Ridge  
Lewisville, TX 75067

Intended Use: Purchase  
Property Type: 2-4 Family

**Reason for Reconsideration of Value**

Enter Reason for "Reconsideration of Value" Below

Additional Market Data for Consideration (enter MLS number, address, etc.)

By checking the box, I acknowledge this is not an attempt to influence the originating appraiser's final opinion of value; however I am requesting the originating appraiser review the above market data, provide additional information or explanation about the basis for the value conclusion.

### 3.1(d) Order Recertification of Value -

Click on *Order Recertification of Value* from either the Completed Orders screen or by opening the Appraisal Order Detail. The Order Recertification of Value screen will open. The Order Type will automatically be selected as a Recertification of Value. Click on the *Submit Appraisal Order* button at the bottom of the page to order the Recertification of Value.

**Order Recertification of Value**

**File Information**

File Entered By: Carol, Ben  
Reference File ID: 110308005  
Loan Number: 2600458

Order Type: Recertification of Value  
Status: New Order  
Priority: Normal


**Company Information**

Company ID: TAC 2  
Loan Officer: Fisher, Cindy  
333-444-5555  
cfisher@revalappraisals.com  
Processor: Carol, Ben  
333-444-5555

## 4 Appraisal Dashboard

- 4.1 All Pending Orders will be displayed on the Appraisal Dashboard. The Appraisal Dashboard allows you to track your appraisal order workload.
- 4.2 The column on the left hand side of the page gives you the ability to search for a specific order or group of orders under "**Find Appraisal**" or by clicking on one of the categories under "**Company Dashboard**". Click on a category from the list to view all orders in that stage of the appraisal process.



- 4.3(f) Docs – When an order is in the Complete Status, click on  *View Docs* to view all of the documents associated with the appraisal order.
- 4.3(g) Inspection – The date the property is inspected will show up in this column after the Appraiser enters his/her inspection date.
- 4.3(h) Due Date – Date the Appraisal Order is due. When an order is past due, the date will be highlighted in red.
- 4.3(i) Address – Address of the property being appraised.
- 4.3(j) Borrower – Name of Borrower.
- 4.3(k) Loan Officer/Processor – Name of Loan Officer/Processor.
- 4.3(l) Status – Displays the status of each order.