

DESCRIPTION

Encompass appraisal ordering

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SUMMARY

This document will take you through the ordering process within Encompass using the Services Tab and Ordering an Appraisal function

DETAILS

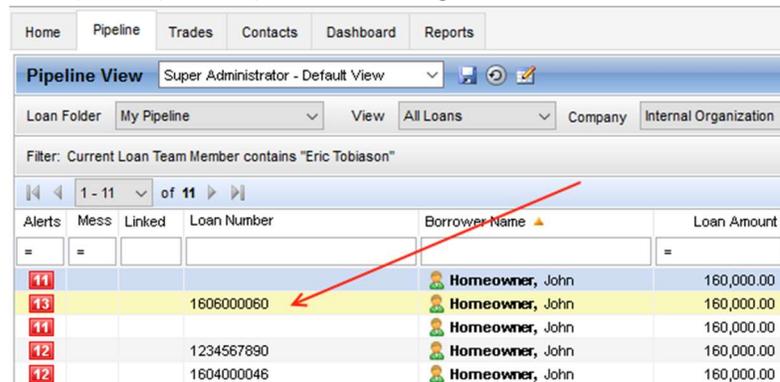
How to order an appraisal via Encompass for Appraisal Scope

SCREENCAST:

<http://screencast-o-matic.com/watch/cbeinR6Uk3>

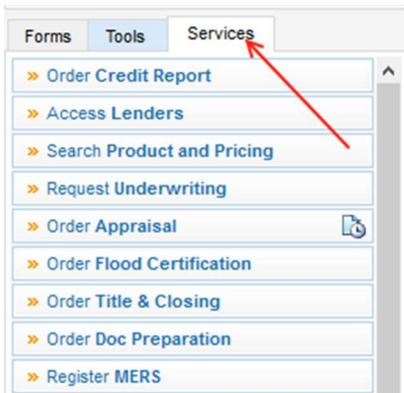
STEP-BY-STEP

- From within Encompass you will need to select an order from your Pipeline by double clicking a loan.

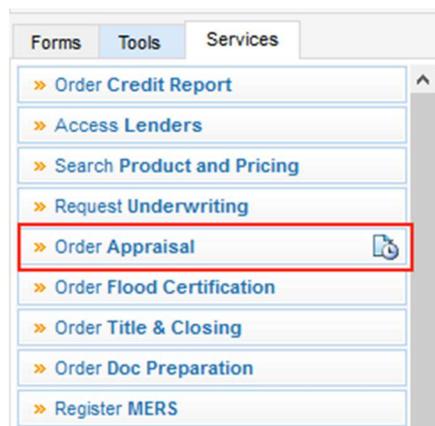


Alerts	Mess	Linked	Loan Number	Borrower Name	Loan Amount
11				Homeowner, John	160,000.00
13			1606000060	Homeowner, John	160,000.00
11				Homeowner, John	160,000.00
12			1234567890	Homeowner, John	160,000.00
12			1604000046	Homeowner, John	160,000.00

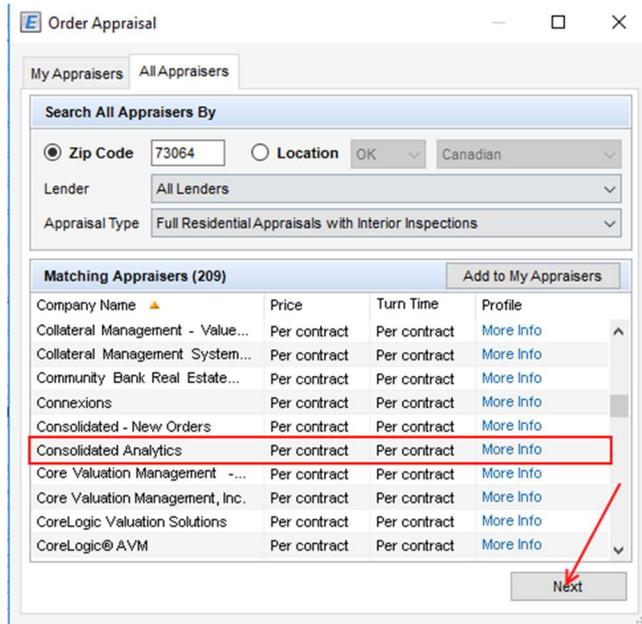
- This will open the Loan. Now ensure everything is ready to go and then click on the Services Tab in the lower left corner of the screen.



- From here you will need to click the Order Appraisal Button



- Once that button is depressed you will be presented with the Vendor selection window. You will need to find the company that you wish to submit an order to for processing and assignment to the vendor from the All Appraisers tab.



Order Appraisal

My Appraisers | All Appraisers

Search All Appraisers By

Zip Code 73064 Location OK Canadian

Lender: All Lenders

Appraisal Type: Full Residential Appraisals with Interior Inspections

Matching Appraisers (209) Add to My Appraisers

Company Name	Price	Turn Time	Profile
Collateral Management - Value...	Per contract	Per contract	More Info
Collateral Management System...	Per contract	Per contract	More Info
Community Bank Real Estate...	Per contract	Per contract	More Info
Connexions	Per contract	Per contract	More Info
Consolidated - New Orders	Per contract	Per contract	More Info
Consolidated Analytics	Per contract	Per contract	More Info
Core Valuation Management - ...	Per contract	Per contract	More Info
Core Valuation Management, Inc.	Per contract	Per contract	More Info
CoreLogic Valuation Solutions	Per contract	Per contract	More Info
CoreLogic@AVM	Per contract	Per contract	More Info

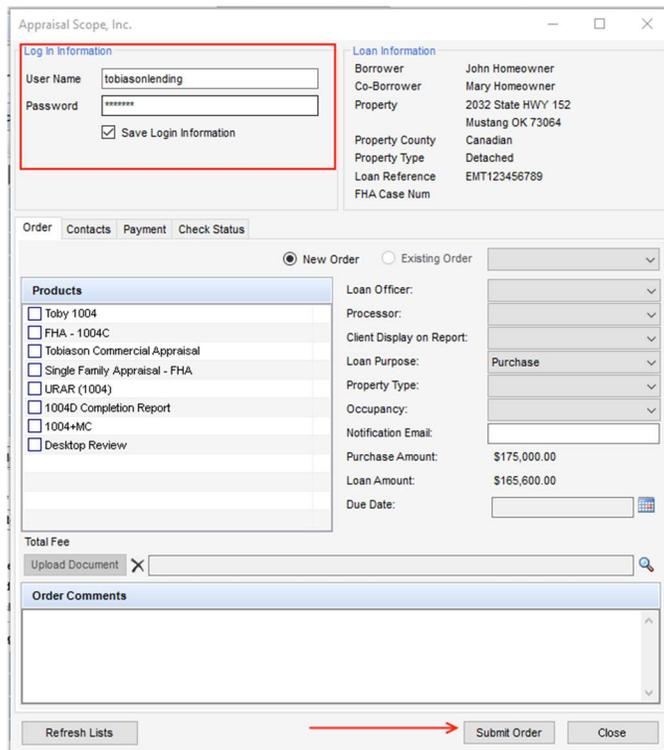
Next

Once the Vendor found and selected you will then click the Next Button. If you are ever unsure if you are picking the correct Appraisal Scope customer you can click on the More Info button to the right and if it takes you to the Appraisal Scope page for the AMC you are attempting to assign to then that is the correct selection.

5. From here you will need to click the Next button after a select is made. This will launch the next step in the ordering an appraisal process.

6. Once you click Next you will be prompted with the window listed below. All options will need to be filled

out and then the Submit Order button will push the order to Appraisal Scope. It is important that the UserName and Password information be entered and correct in order for the order to submit to the appropriate Appraisal Scope platform.



Appraisal Scope, Inc.

Log In Information

User Name: tobiasonlending

Password: *****

Save Login Information

Loan Information

Borrower: John Homeowner

Co-Borrower: Mary Homeowner

Property: 2032 State HWY 152 Mustang OK 73064

Property County: Canadian

Property Type: Detached

Loan Reference: EMT123456789

FHA Case Num:

Order | Contacts | Payment | Check Status

New Order Existing Order

Products

- Toby 1004
- FHA - 1004C
- Tobiason Commercial Appraisal
- Single Family Appraisal - FHA
- URAR (1004)
- 1004D Completion Report
- 1004+MC
- Desktop Review

Loan Officer:

Processor:

Client Display on Report:

Loan Purpose: Purchase

Property Type:

Occupancy:

Notification Email:

Purchase Amount: \$175,000.00

Loan Amount: \$165,600.00

Due Date:

Total Fee

Upload Document

Order Comments

Refresh Lists

Submit Order

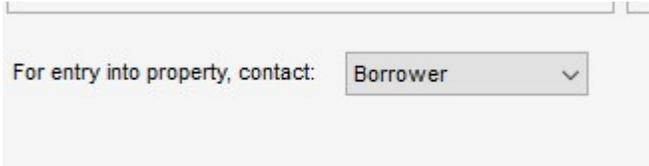
Close

7. Now that the Order screen is available for input it will be important to select the correct product and all information to the right in the drop down section such as Loan Officer, Processor, Client displayed on Report, and so on.

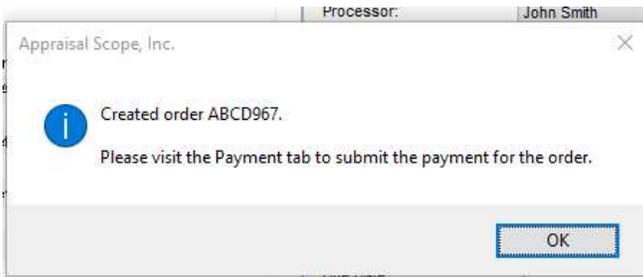
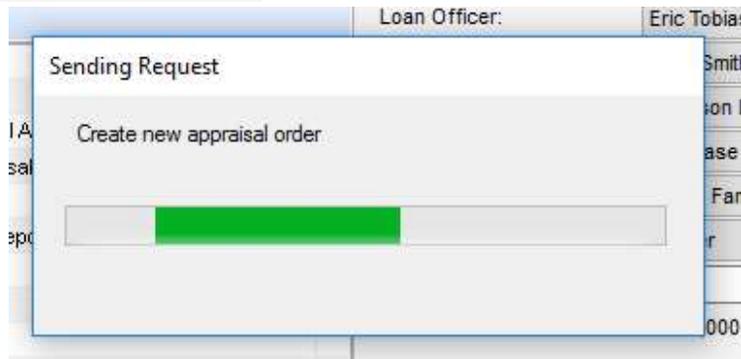
8. The Upload Document section will allow you to select documents such as Contracts and other important data that needs to be submitted with the order.

9. The Order Comments section will allow free form data to be submitted with the order and shows up in the Additional Comments box within Appraisal Scope.

- The Contacts Section will need to be filled out and the best person to contact will need to be selected at the bottom of the window in order for submission to be successful.

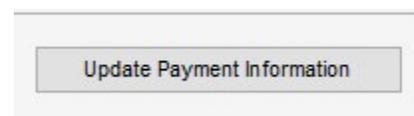
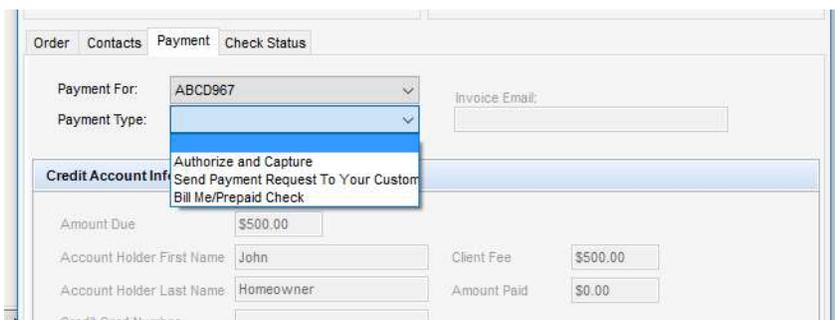


- Now the order can be submitted. The Sending Request window will appear. Once this window is gone you will get the Create Order window telling you the Order ID and asking you to visit the Payment Tab.



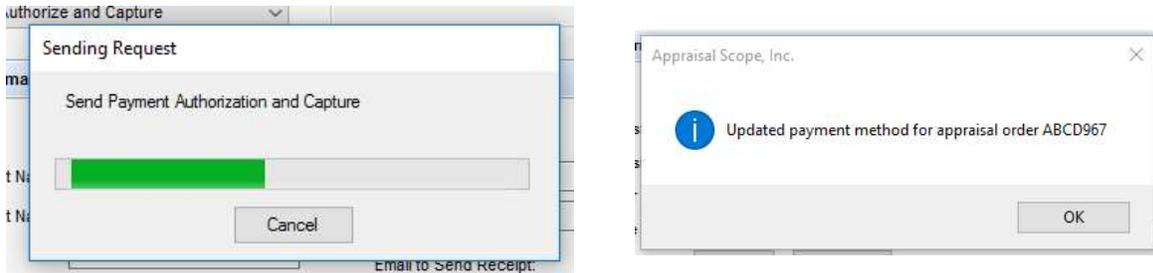
- The Payment Tab will allow the Client to enter and choose the payment options that are available to them from Appraisal Scope.

- Once a Payment option has been selected from the drop down for Payment Type you will need



to click the Update Payment Information button.

14. A status screen will appear and then a message prompt that the payment method was updated.



15. The order has now been submitted to Appraisal Scope and Payment information has been provided to the platform you chose to submit the order too.