Ordering Supplemental Appraisal Products

This is a companion procedure document to the Appraisal Management System Quick Reference Guide for Franklin American Mortgage Company’s Wholesale customers to use when ordering supplemental appraisal products.
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A. OVERVIEW (12/31/2015)

In addition to the Appraisal Management System Quick Reference Guide (Create and Manage New Orders), the user will be able to utilize this procedure document to order supplemental appraisal products.

To place an order for a supplemental appraisal product (final inspection, etc.), please visit franklinamerican.com and click on Loan Status > View Pipeline.

In the Pipeline Report, select loan and click on “Manage Orders”.

The landing page will enable the user to “Order Additional Product”.

After selecting “Order Additional Product”, complete the required “Appraisal Ordering Form Questions”.

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Original Issue Date: 12/22/2015
Last Revision Date: 12/31/2015
Last Reviewed Date: 12/31/2015
In the **Appraisal Ordering Form** section, select **Appraisal Type > Final Inspection** (or whatever supplement appraisal product desired).

The user will be redirected to RealEC to complete the supplemental order.
B. USING SEARCH (12/31/2015)

1. Input the applicable search criteria.

The Search screen will automatically default once the user enters RealEC’s website. Input specific search criteria such as Loan Number or Borrower Name into the appropriate fields. You may choose to search for Orders, Documents or External Documents. You may also select the number of orders that display per page. Click Search at bottom of page or just hit Enter.

2. Order Search results

The applicable order(s) will be shown on the Search results page. From the Search results page, you may:

- Use the Scroll bar to access additional Order information including Loan Number, Borrower Name, Property Address, Product ordered and more.
- Select the Transaction Number to view the Order Summary page. From this page, the Event History for the order is displayed and the ability to add additional products and events can be accessed.
- Select the document icon in the Doc column to view or print the completed report.
- Download your search results into an Excel or Access spreadsheet by clicking Export Results link at the bottom of the page.
C. ADDING A PRODUCT TO AN EXISTING ORDER (12/31/2015)

You may add a product to an existing order such as a Final Inspection or Comparable Rent Schedule. To find an existing order, follow the instructions below.

1. Input applicable search criteria (such as Loan Number or Borrower Name) into the appropriate fields.

   **Note:** The user will be directed to this Search screen automatically.
2. Click Search at bottom of the page.

   ![Search Button]

   The applicable order(s) will show on the search results page.

3. Click the corresponding Transaction Number to access the Order Summary page.

   Use the Scroll bar to view additional Order information including Loan Number, Borrower Name, Property Address, Product ordered, etc. Click the applicable Transaction Number.

4. Select Add Product at the top of the page to access the New Order page.

   ![New Order Page]

   Click Add New Product to access the New Order page.
5. Choose the Product Type (Appraisal/eValuations) and select the Product to be ordered.

Click Begin New Order to continue.

**NOTE:** Required fields are denoted by an asterisk* and the word “Required”.

6. Click Continue to the Loan Information tab. Complete order screens 1-5 verifying Order Info, Loan, Property, Party, and Order Details information.

**Loan:**
- Complete Purpose of Loan using Purchase/Sale or Refinance
- Complete Mortgage Applied for using Conventional, FHA, or USDA as applicable (for VA IRRRL use Conventional).
- Do NOT use Add Product to confirm Equity in current residence – see Section G on how to place a new order for an equity property.
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**Property:**
- Verify the Property Type shows Single Family, Condominium, or 2-4 Unit property.

**Parties:**
- All entries from the original order should be listed in this section. Every Order MUST designate a Property Contact (Borrower, Co-Borrower, Seller, Other). Verify the information listed is correct. This should be the person the appraiser is to contact for entry.
- If any information is incorrect, edit as necessary.
- Do not duplicate entries/contacts.
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Order Details:
- To request a rush, indicate this in the Instructions box and then contact the selected AMC to verify availability. [NOTE: Need By Date, Rush Order and Fee data fields are NOT functional.]

Order Details: You may also Add Documents or Add Notifications (see individual user guides denoted for each process). Click Continue to Complete Order Screen.
7. **Complete the Payment Information.**

You will be prompted to input borrower credit card information to submit for payment for the appraisal fee. Please carefully complete the required fields.

![Payment Information Form]

![Billing Address Form]
Complete the borrower information and read and agree to the disclaimer. Click Submit Order to place the Appraisal order.

NOTE: To review the order before submitting, click the Review Order link at the bottom of the page. Once reviewed, click Submit Order to complete the order.
Once the order is placed an Order Confirmation page will appear.

**NOTE:** From the Order Summary Page you may Add Events, Add Product, View Order Sheet, or Print the Order Summary Report.

D. **ADDING NOTIFICATIONS (12/11/2015)**

1. Conduct a search for the order you want to add a notification. From the Search Results page, click the Transaction Number to display the Order Summary page.
2. **Click the Notifications tab at the top of the Event History.**

3. **Users may add parties to certain event communications.**

   Click the Attach Notifications link to display current order notifications.

   **NOTE:** Required fields are denoted by an asterisk* and the word “Required”. 
4. Enter the email address of the party you wish to receive notification and select the notifications you would like them to receive.

**NOTE:** Click Select All if you would like to have the party receive all notifications listed.

- You may attach additional notifications for another user by clicking on the Attach More Notifications link.
- Click Submit Notifications to set, as shown on the following page.

- Once the notifications are set, the page will refresh and the email setup will display. Click the View/Edit link to view and/or edit notifications that have been set.

- If View/Edit is clicked, the page will refresh and display the notifications that are set on the order.
The user will have the ability to remove ALL notifications and recipient information by clicking the Remove Recipient link.

5. Click Edit Notifications to edit the user notifications.
   - The page will refresh. De-select the boxes next to the notifications you wish to remove and click Save Changes.
   - The Remove Recipient link is also available if you wish to remove all notifications and the recipient’s email.
E. ADDING A DOCUMENT (12/11/2015)

The Add Document option is available when placing an order, by viewing the Order Summary page after an order is placed or by conducting a search and accessing the Order Summary page via the Transaction Number.

1. Conduct a search for the order you wish to add a document. From the search results page, click the Transaction Number to display the Order Summary page.

   ![Search Results]

2. Click the Documents tab at the top of the Event History.

   ![Events Tab]

3. Click the Attach Documents link.

   **NOTE:** Required fields are denoted by an asterisk* and the word “Required”.

   ![Attach Document(s)]
4. Click Choose File to browse for the document then Select.

Enter a description of the document, either via the drop-down menu labeled Document Type or type the document name in the Document Description field below it.

The page will refresh and display the document.

**NOTE:** You may remove the document if needed by clicking Undo.

Click Upload document(s) to complete the document upload. The page will display the document that has been uploaded. An example is provided on the following page.
The document upload will display on the Events tab as a 460 event-Document Attached by Customer.
F. ADDING AN EVENT TO AN ORDER (12/11/2015)

The following describes the ability for users to send comments, cancel orders, update status and schedule events on an order.

1. Access the Order Summary page by clicking the Transaction Number from the search results page.

   - Use the Scroll bar to access additional information including Loan Number, Borrower Name, Property Address, and Product Name to ensure correct Order selection.

   The Add New Event link is located at the top left of the event history on the Order Summary page.
2. Select the event from the event drop down list.

*NOTE:* Events are listed in numeric order by event number.

Once the event is selected, fill in additional required fields. Click Add Event to add the event to the order.

*NOTE:* Required fields are denoted by an asterisk * and the word “Required”.

![Event selection interface](image-url)
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The events will display on the Event History page in chronological order. Clicking on the Event name will display additional info (event comments, date and time event was sent, and which user posted the event). View more detail by clicking Read More.

Clicking Read More will open a new browser page that displays all event details.

G. PLACING A NEW APPRAISAL ORDER FOR AN EQUITY PROPERTY (12/31/2015)

If the underwriter requires the borrower to show equity on an existing property, please contact the FAMC Appraisal Services Department for further assistance in ordering the new appraisal.
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Appraisal Management Services

There are two ways brokers may contact the Appraisal Services team:

1. Please send an email notification to appraisalservices@franklinamerican.com and include the borrower’s last name and FAMC loan number in the subject line of the email.
2. Call 615-614-6000 and provide the borrower’s last name and loan number to the representative.