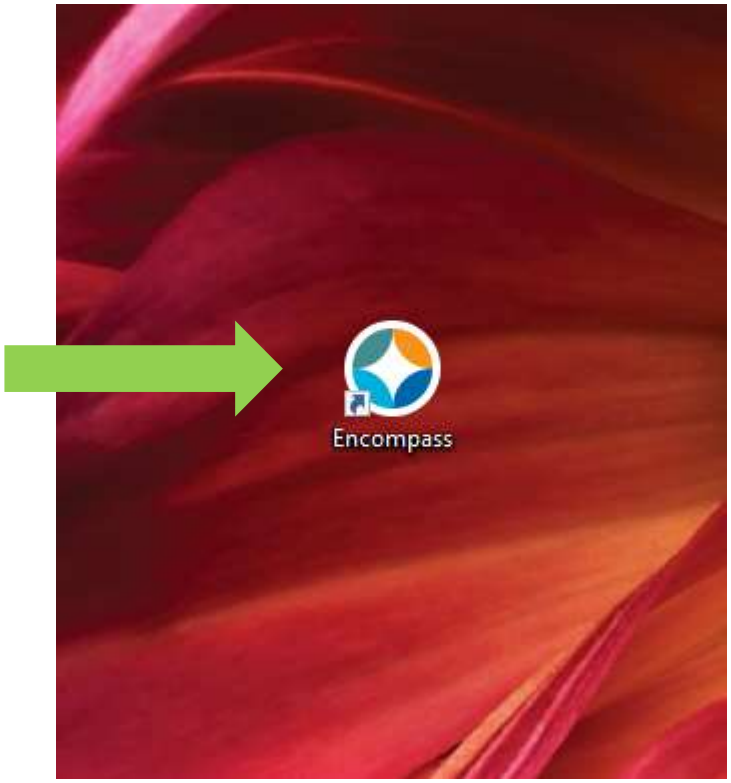
Encompass®

How To:
Order an Appraisal

AppraisalTek™

Initial Login

1. To open Encompass, double click the shortcut icon on your desktop.



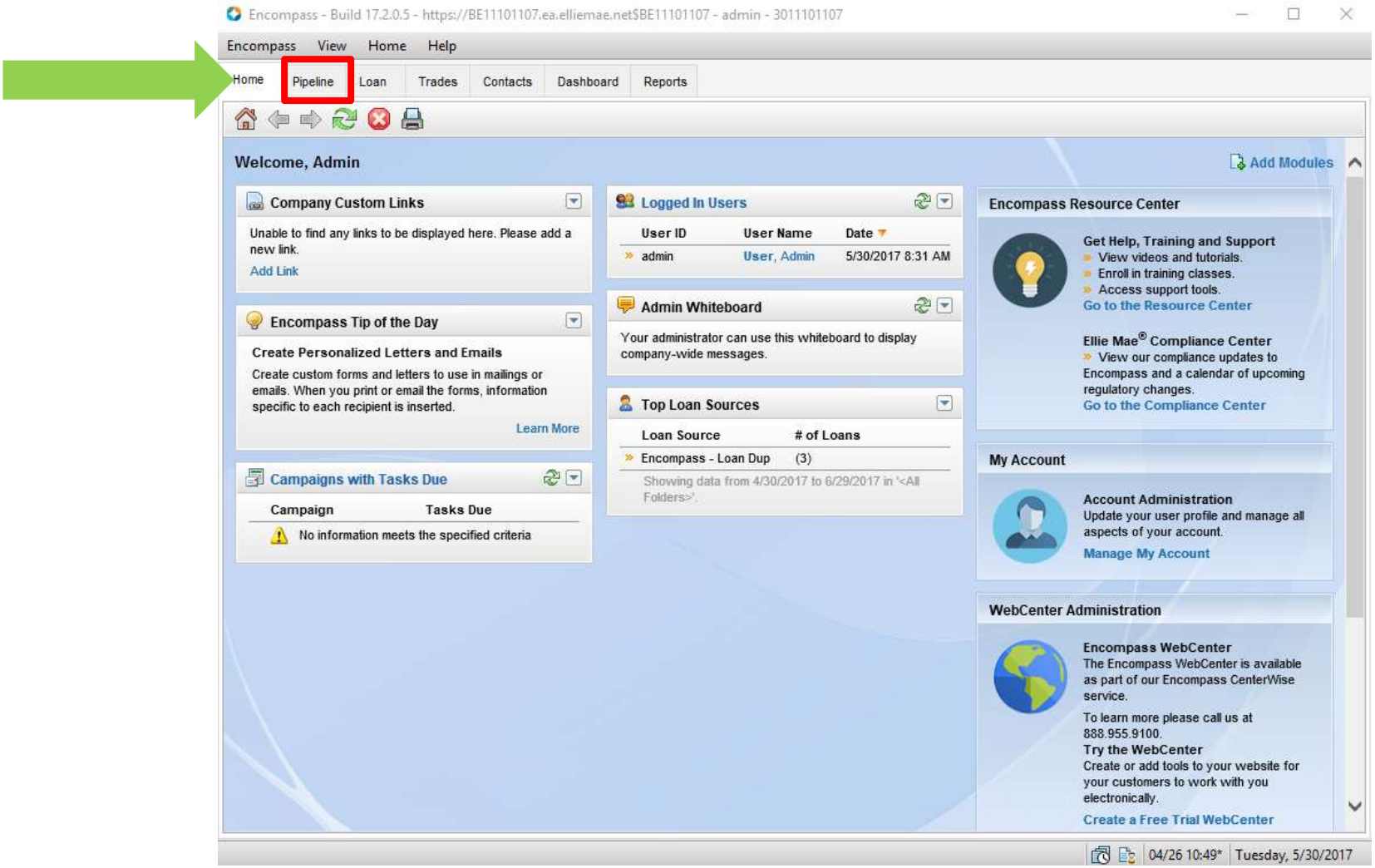
AppraisalTek™

Initial Login

1. To login, simply type in your User ID and Password and click “Log In”.
   Login credentials should have been provided to you by your company’s IT department.
2. The Server should already be prefilled by your IT department.

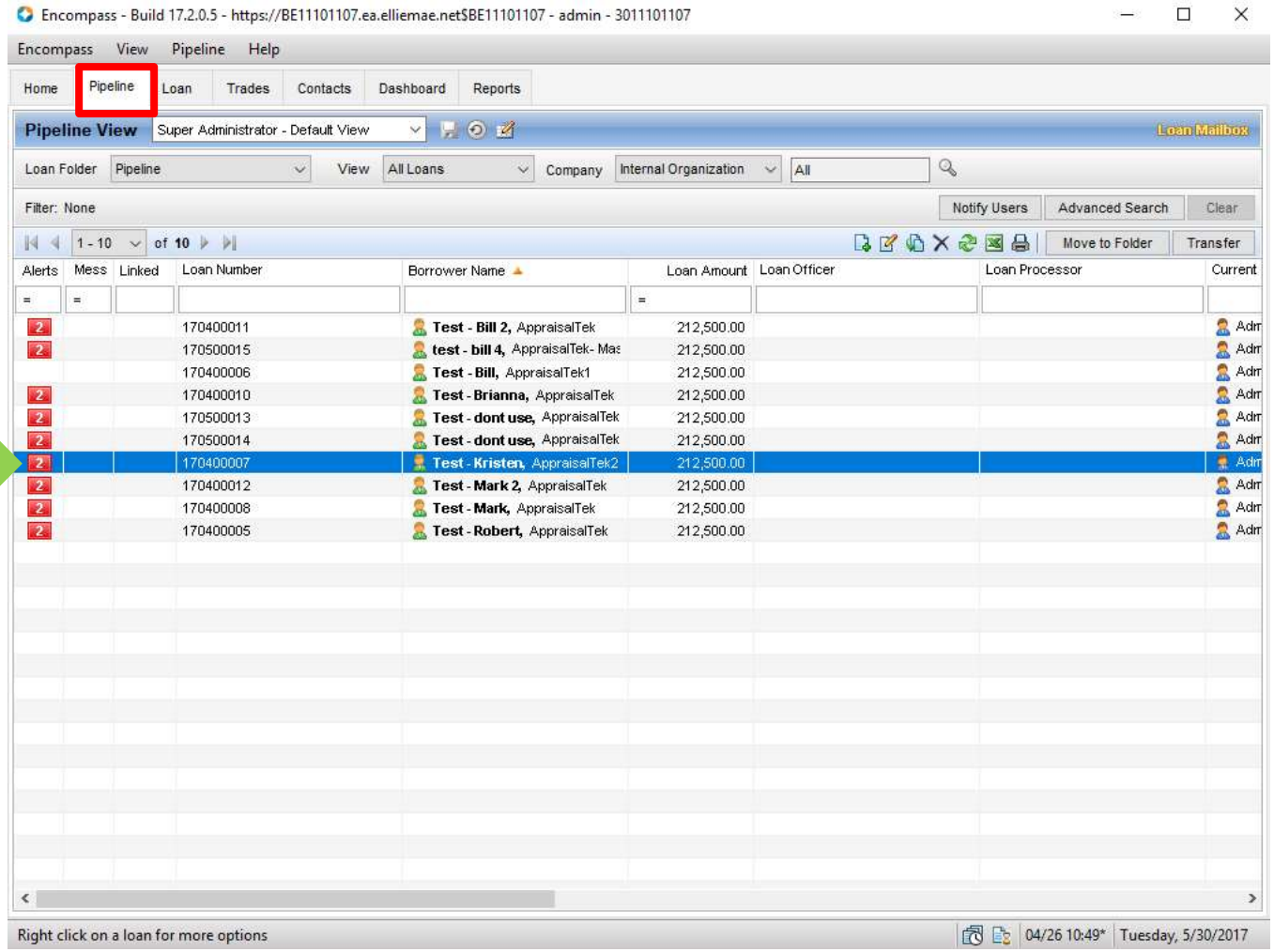
Order an Appraisal

1. On the “Welcome” or “Home” screen, click the “Pipeline” tab at the top.



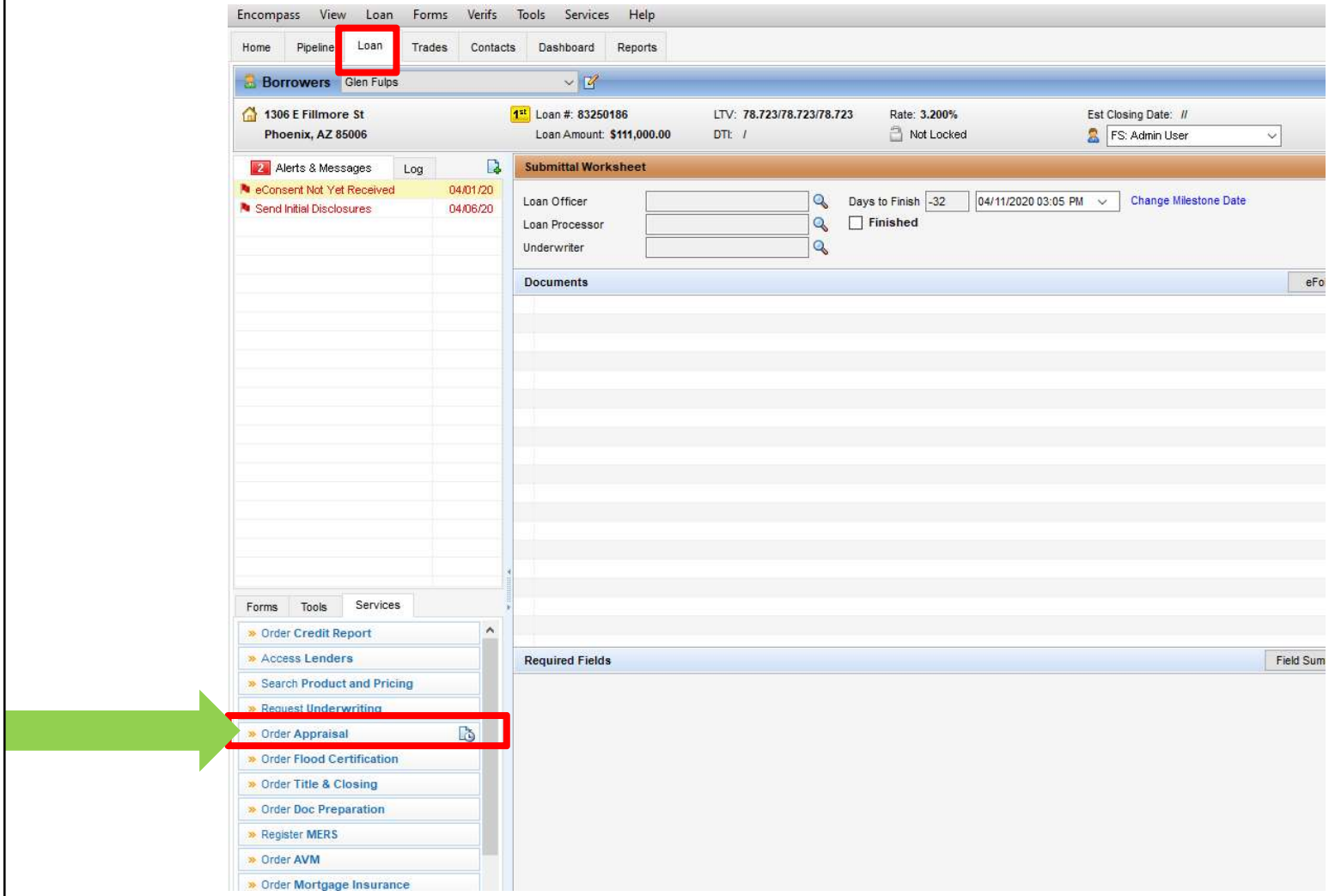
Order an Appraisal

1. This page will list your open contracts/borrowers. On this “Pipeline” screen, double click the correct borrower you need to order an appraisal for, view an existing appraisal order for, or update an order for.



Order an Appraisal

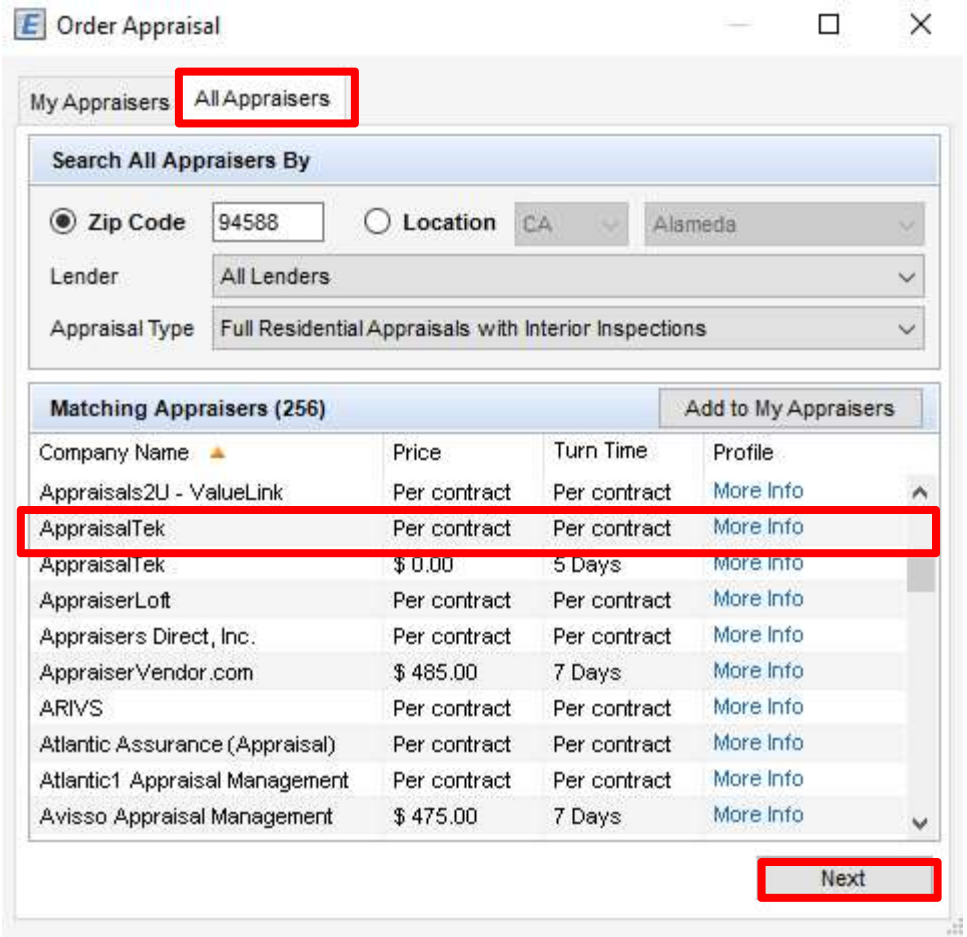
1. You will redirect to the “Loan” page for the borrower selected. Click “Order Appraisal” to order an appraisal, check status, or update an existing order.

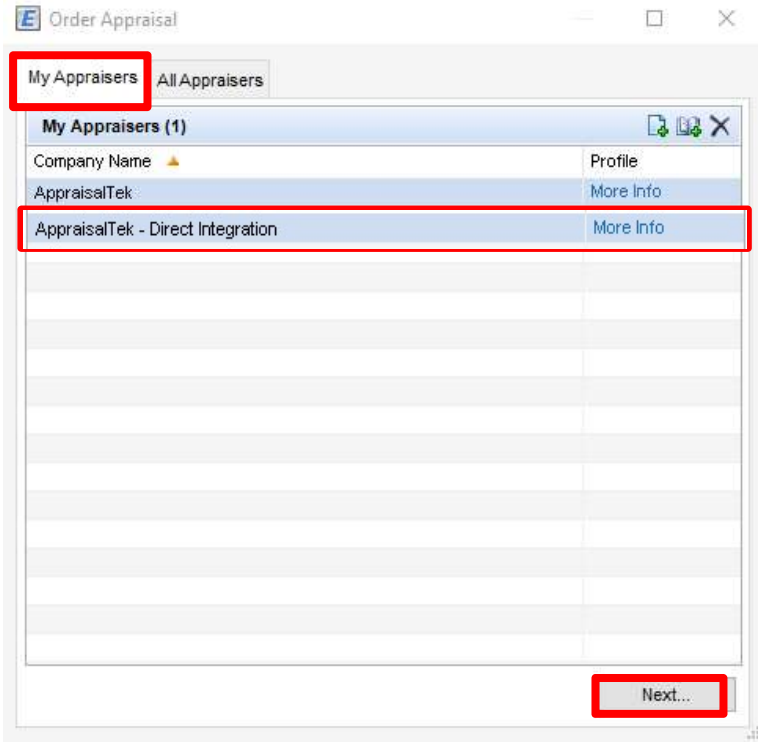


Order an Appraisal

1. You will redirect to the “Order Appraisal” pop up window. Select the “All Appraisers” tab and scroll through the list to select AppraisalTek. Once you have selected AppraisalTek, click “Next”.

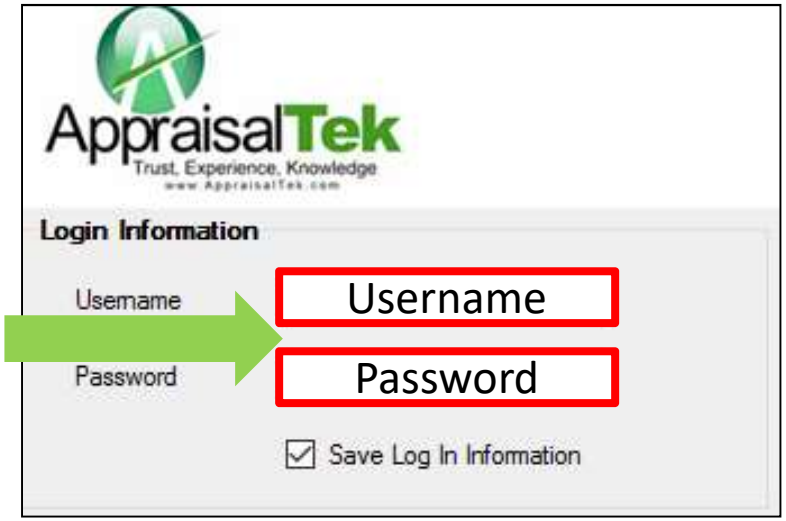
Note: Once you use AppraisalTek once, it will be added to the “My Appraisers” tab for easier access.

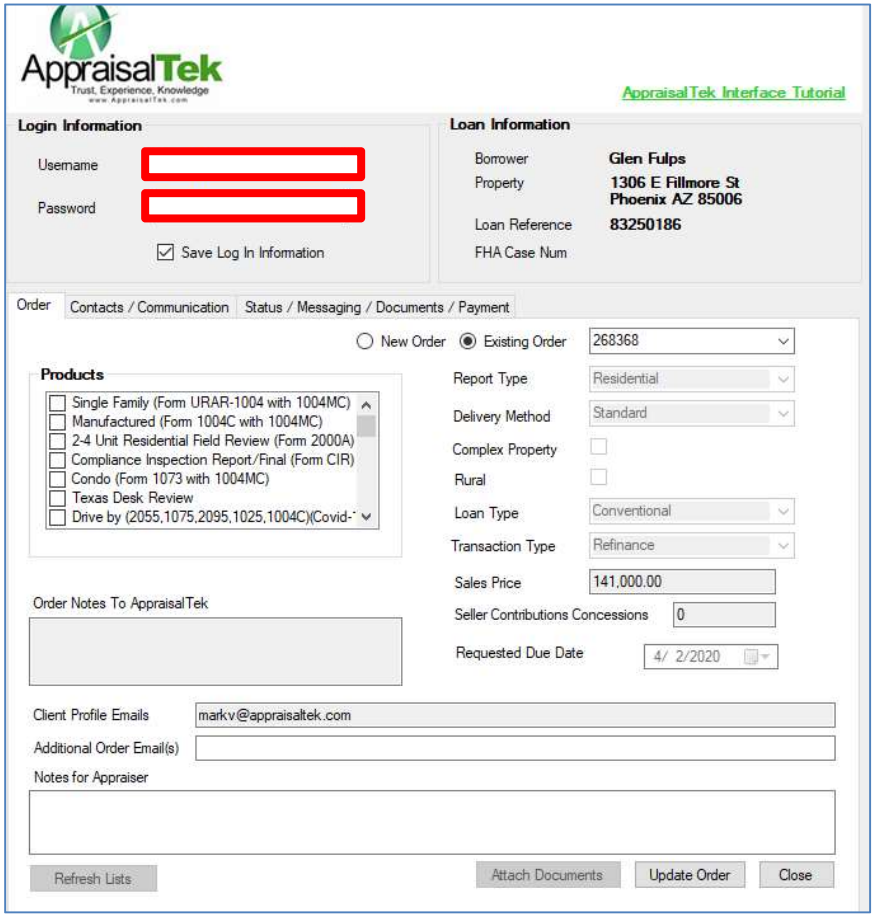




Order an Appraisal

1. You will redirect to the “Appraisal Order” pop up window. Your Username and Password will be provided by AppraisalTek.

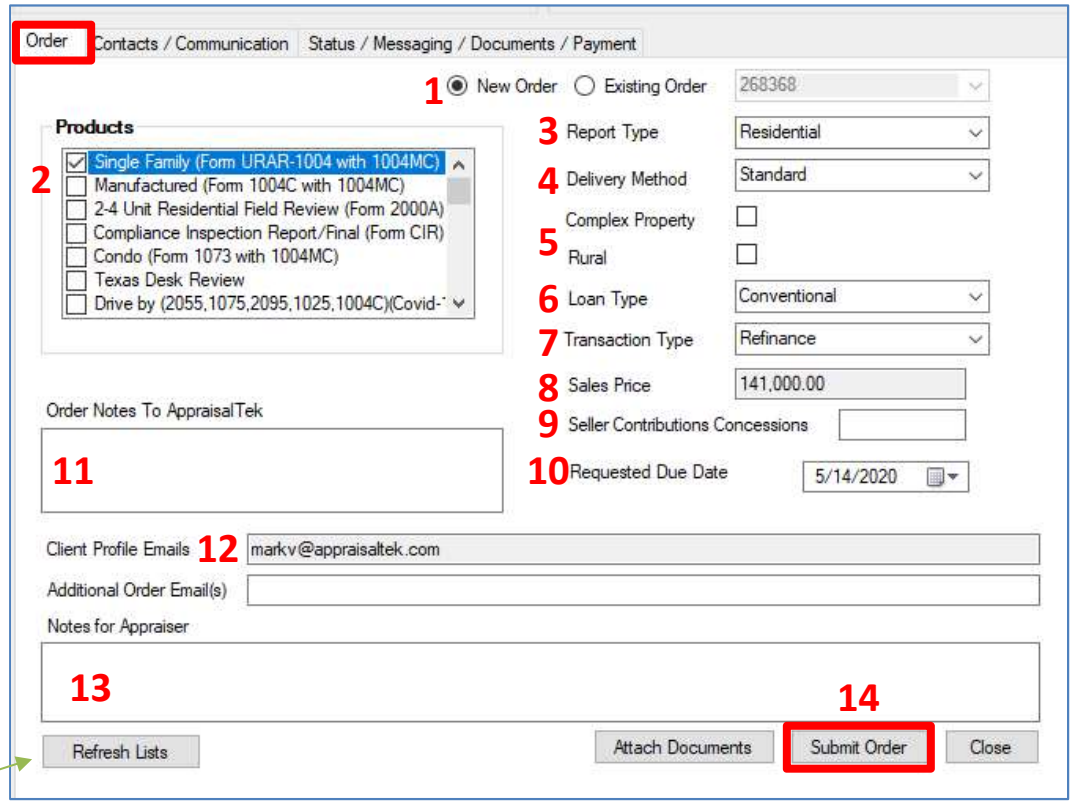




Order an Appraisal

1. Enter in the necessary information needed for the appraisal order on the “Order” tab.

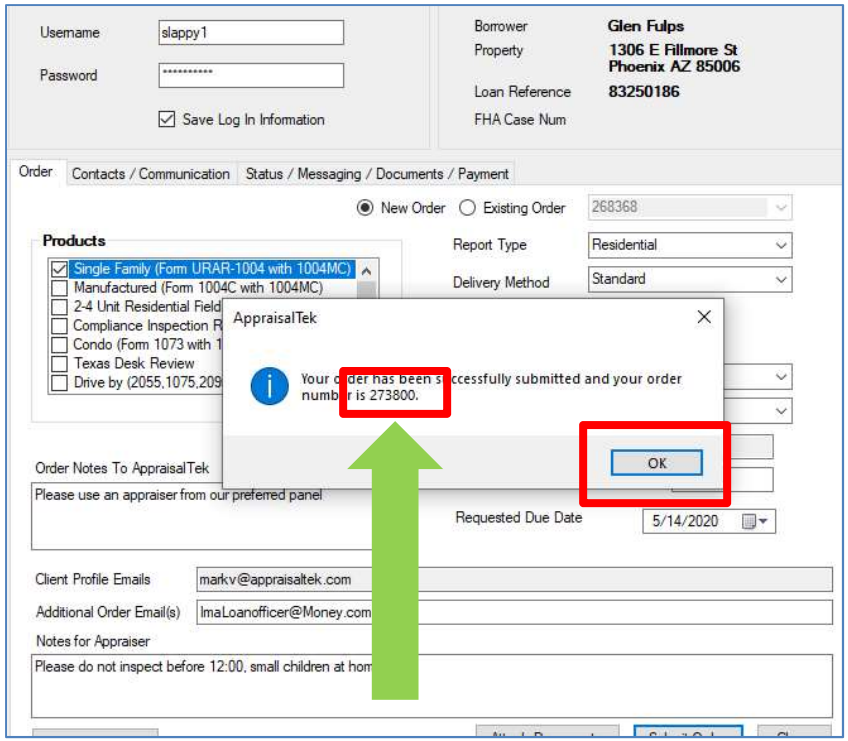
1. New Order
2. Appraisal Type
3. Report Type
4. Delivery Method
5. Be sure to check if the property qualifies as “Jumbo” or “Rural”
6. Loan Type
7. Transaction Type
8. Sales Price
9. Seller Contributions Concessions (if any)
10. Requested Due Date
11. Other Special Instructions
12. Include any email addresses needed for correspondence on this order
13. Notes for Appraiser
14. “Submit Order”

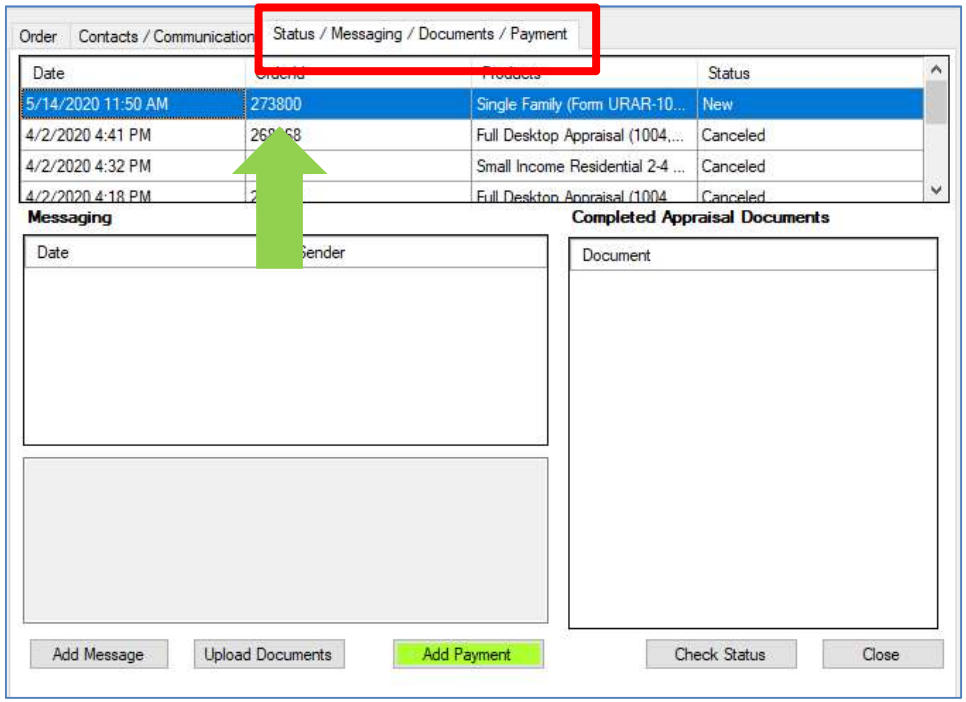


If for any reason, no product choices appear, click “Refresh Lists”

Order an Appraisal

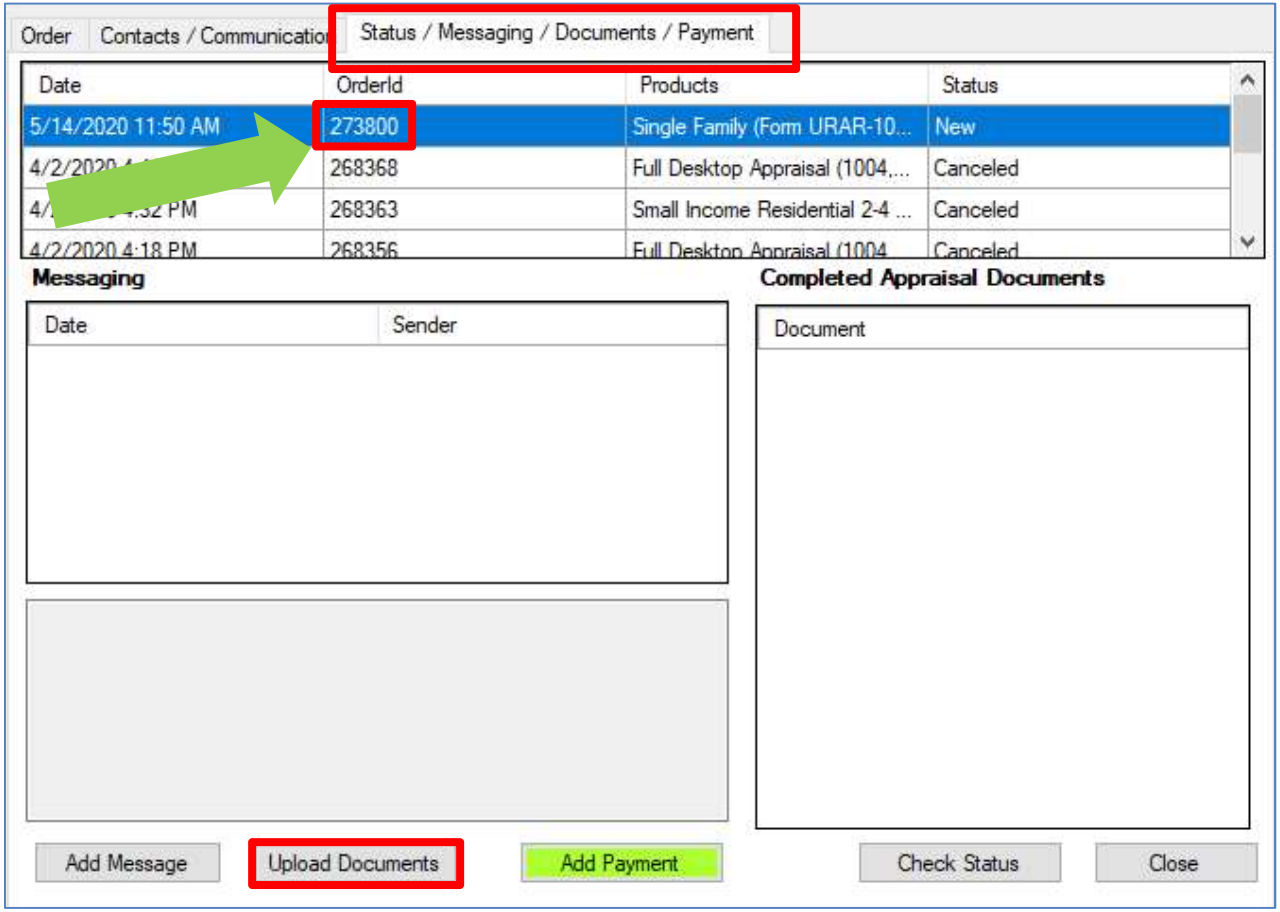
1. Once you submit the order, a pop up box will appear confirming your submission and AppraisalTek order number. Click “OK”.
2. You will then be redirected to the “Status/Messaging/Documents/Payment” page.





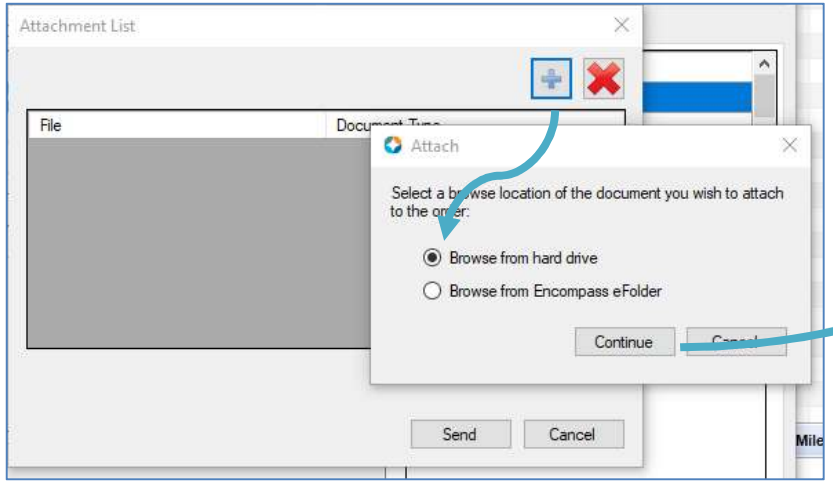
Upload Documents

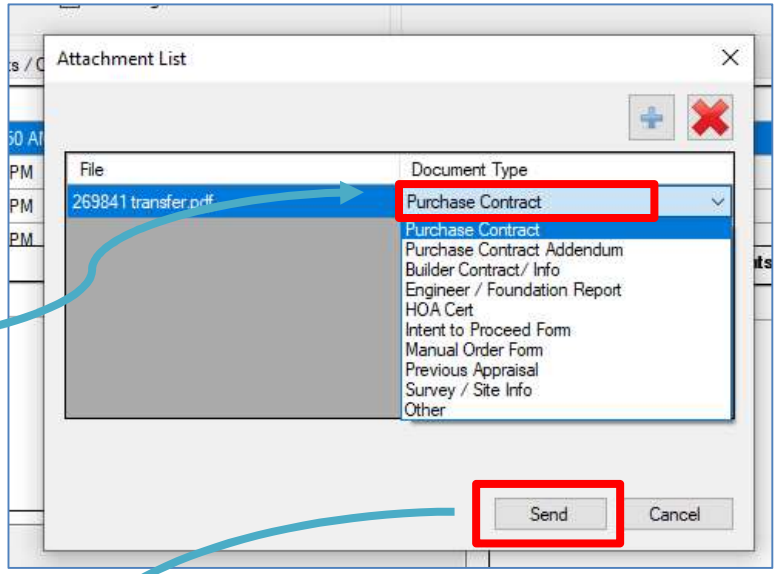
1. You can upload documents such as the Purchase Contract, PC Addendum, previous appraisal, etc. to the order from the “Status/Messaging/Documents/Payment” page.
2. Select the order you need to upload documents for.
3. Click “Upload Documents”.

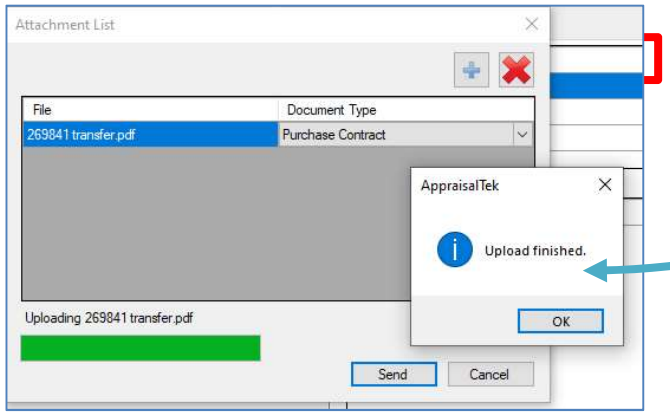


Upload Documents

1. The “Attachment List” pop up box will open.
2. Click the + button to select your file. A new pop up box will appear.
3. Select the location to browse from and click “Continue”. Select the file. You must then select the “Document Type” in the drop down box. Click “Send”
4. An “Upload Finished” box will appear to confirm the file uploaded.
5. You may also delete an attachment already selected by clicking the X button.

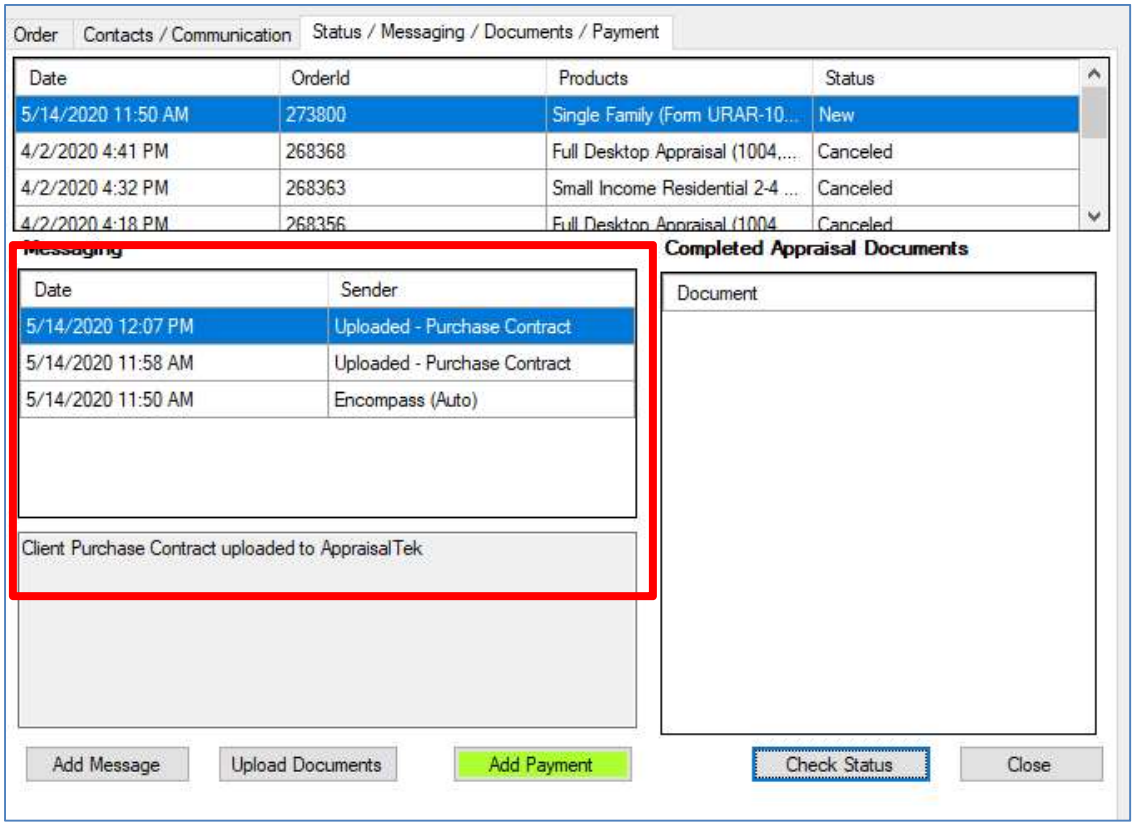




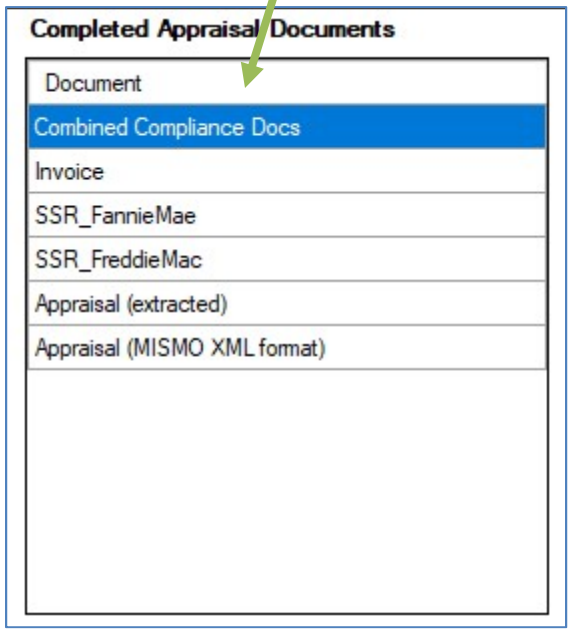


Upload Documents

Attached documents will not appear but a message will be displayed with the document type.

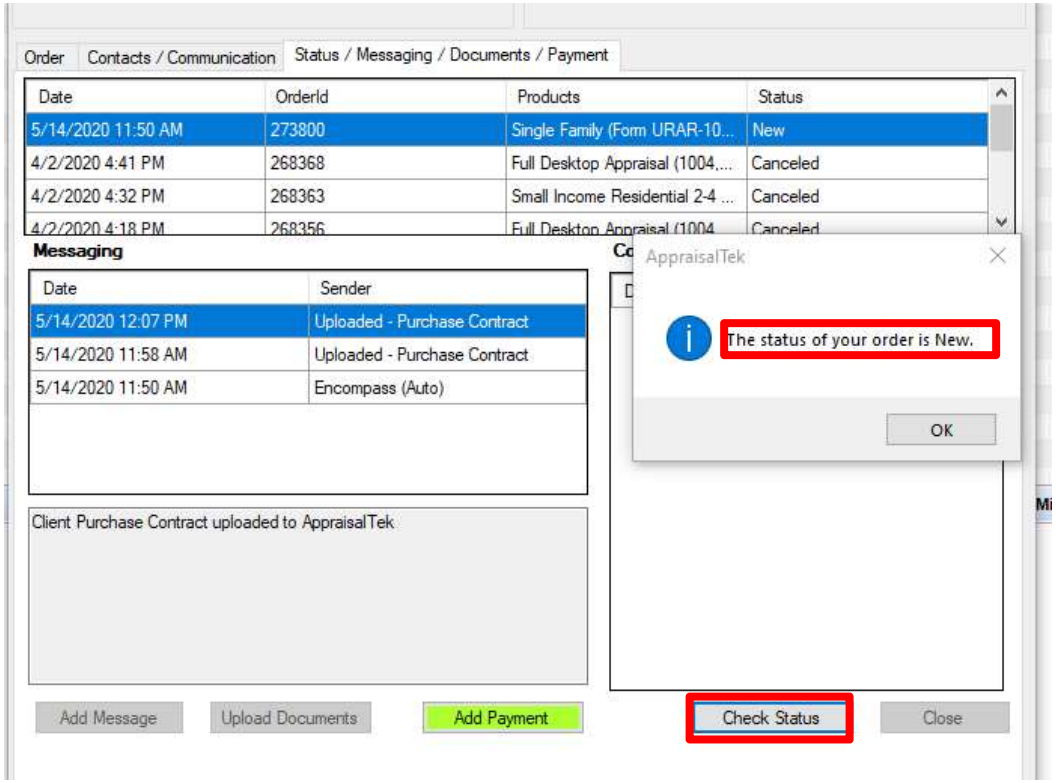


When the appraisal is delivered to you, when you hit "Check Status", it will populate those documents and look like this.



Check Status

1. To check the status of a submitted appraisal order, click on the “Check Status” tab from within the “Order an Appraisal” screen.
2. Select the correct order number, and click “Check Status”.

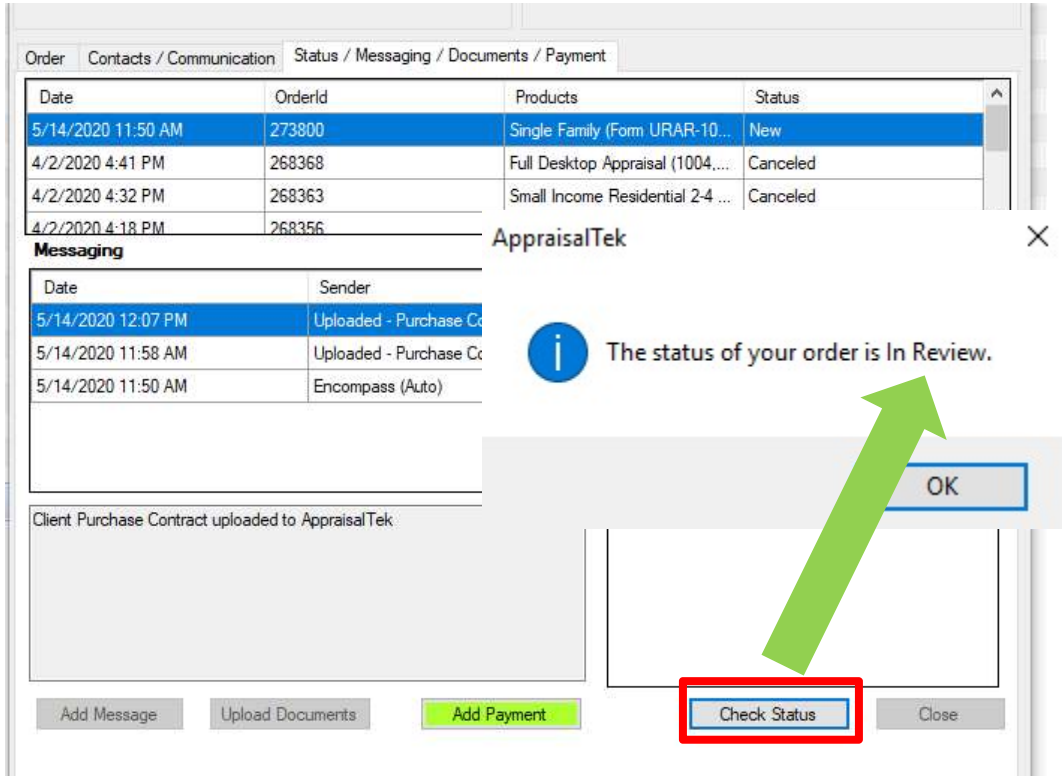


Check Status

1. A pop up box will appear and tell you what the status of your order is. Click “OK” to exit.

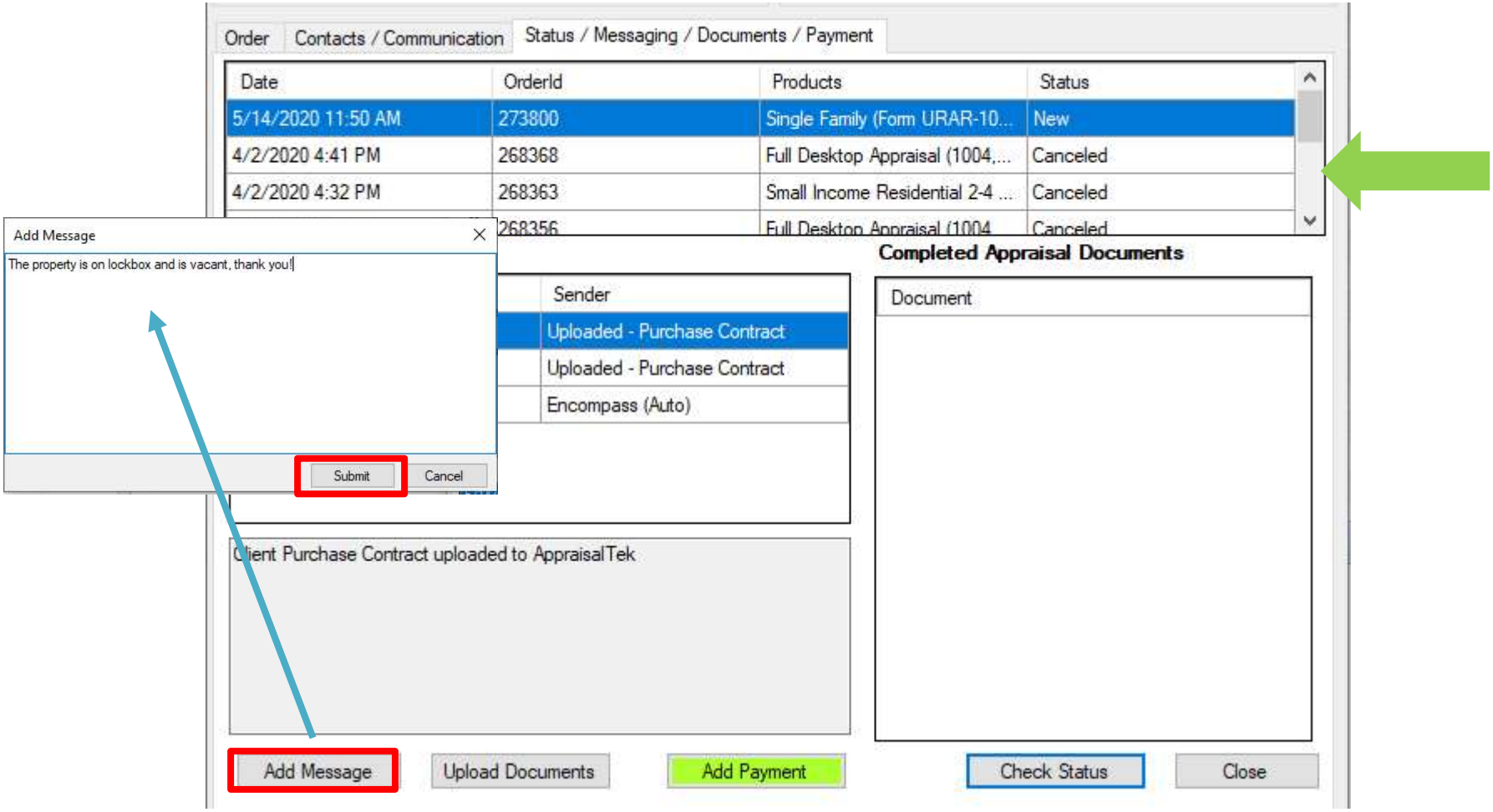
AppraisalTek Order Status

1. New
2. Appointment Made
3. In Progress/In Review
4. Canceled
5. On Hold
6. Delayed
7. Reconsideration
8. ATek Condition 1
9. ATek Condition 2
10. ATek Condition 3
11. Need Client Info
12. Underwriting Condition 1
13. Underwriting Condition 2
14. Underwriting Condition 3



Adding Comments

1. You can receive and respond to comments on the order directly though Encompass. On the “Check Status” tab, the “Comments” box will contain all messages received and sent on a specific order.



Questions

Contact AppraisalTek with any questions!

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