

Encompass[®]

**How To:
Order an Appraisal**

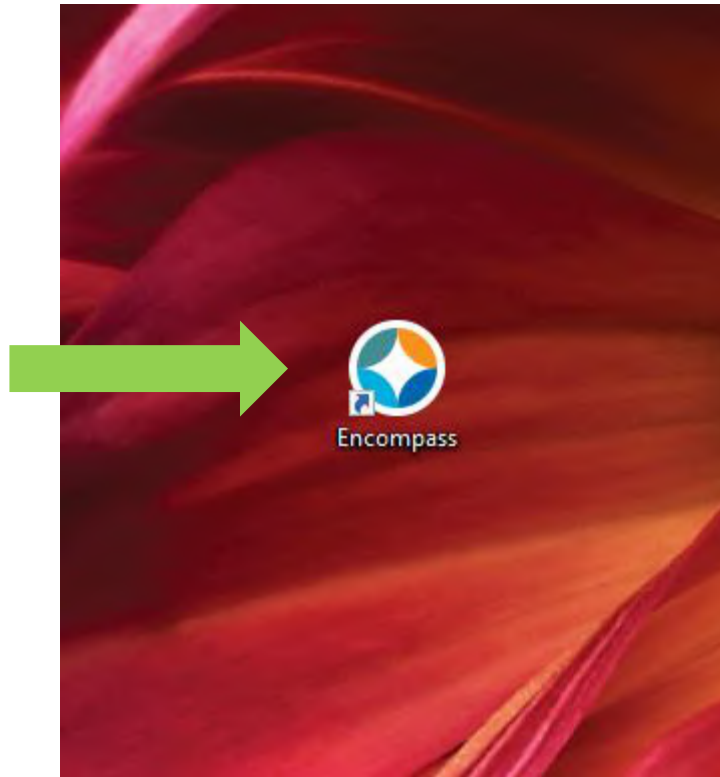


AppraisalTek[™]

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.

Encompass Log In

Encompass
by EllieMae®

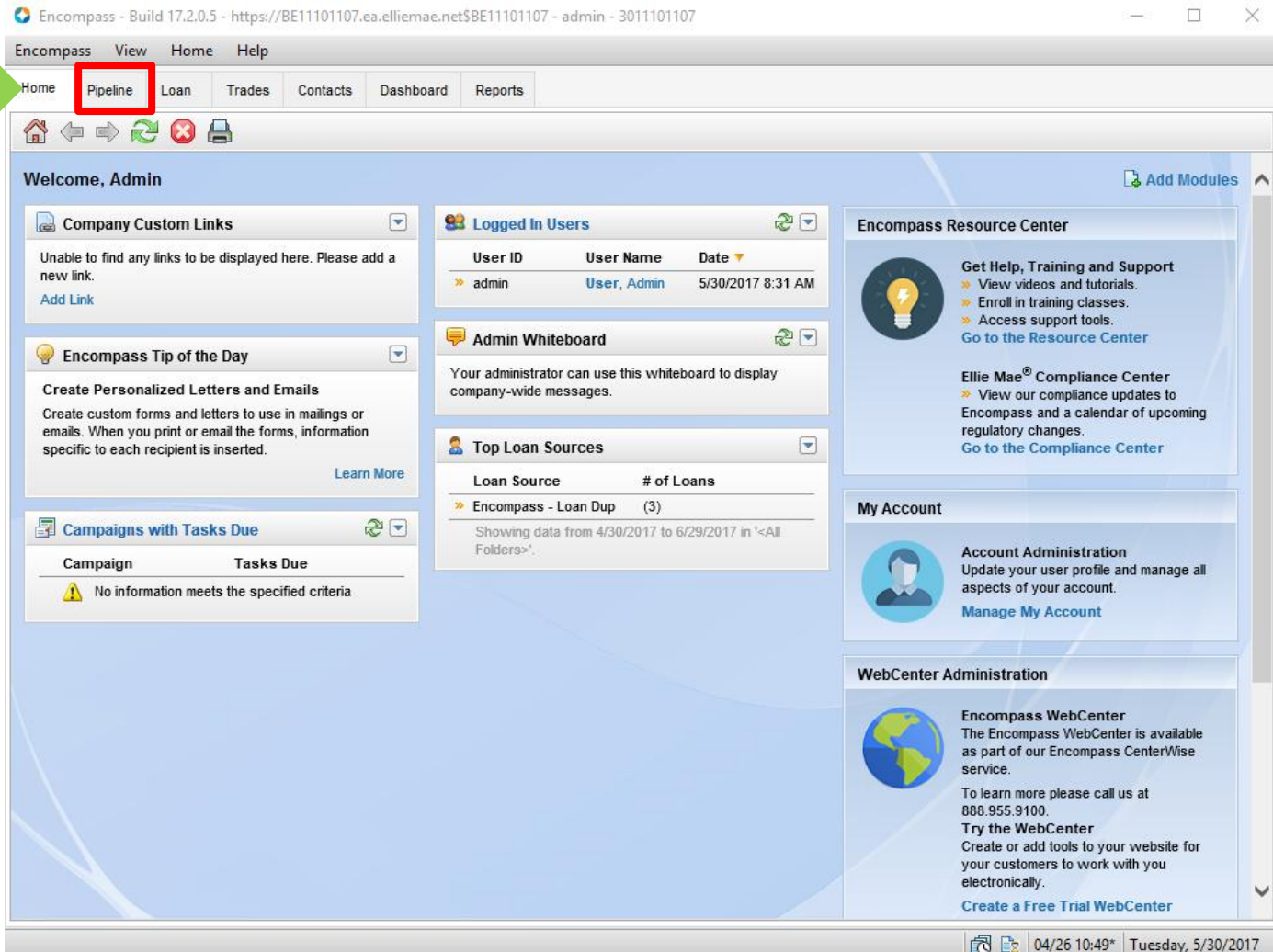
User ID

Password

Server

Order an Appraisal

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



The screenshot shows the Encompass software interface. The browser address bar displays "Encompass - Build 17.2.0.5 - https://BE11101107.ea.elliemae.net/SBE11101107 - admin - 3011101107". The top navigation bar includes "Encompass", "View", "Home", and "Help". Below this, a secondary navigation bar contains "Home", "Pipeline", "Loan", "Trades", "Contacts", "Dashboard", and "Reports". A green arrow points to the "Pipeline" tab, which is highlighted with a red box. The main content area is titled "Welcome, Admin" and contains several widgets: "Company Custom Links", "Encompass Tip of the Day" (with the tip "Create Personalized Letters and Emails"), "Campaigns with Tasks Due" (showing no information), "Logged In Users" (table with 1 user: admin), "Admin Whiteboard", "Top Loan Sources" (table with 1 source: Encompass - Loan Dup), "Encompass Resource Center", "My Account", and "WebCenter Administration". The system tray at the bottom shows the date and time: "04/26 10:49* Tuesday, 5/30/2017".

Encompass - Build 17.2.0.5 - https://BE11101107.ea.elliemae.net/SBE11101107 - admin - 3011101107

Encompass View Home Help

Home Pipeline Loan Trades Contacts Dashboard Reports

Welcome, Admin

Company Custom Links

Unable to find any links to be displayed here. Please add a new link.

Add Link

Encompass Tip of the Day

Create Personalized Letters and Emails

Create custom forms and letters to use in mailings or emails. When you print or email the forms, information specific to each recipient is inserted.

Learn More

Campaigns with Tasks Due

Campaign	Tasks Due
⚠	No information meets the specified criteria

Logged In Users

User ID	User Name	Date
admin	User, Admin	5/30/2017 8:31 AM

Admin Whiteboard

Your administrator can use this whiteboard to display company-wide messages.

Top Loan Sources

Loan Source	# of Loans
Encompass - Loan Dup	(3)

Showing data from 4/30/2017 to 6/29/2017 in '<All Folders>'.</p></div>

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.

The screenshot shows the Encompass Pipeline View interface. The 'Pipeline' tab is selected in the top navigation bar. The main area displays a table of borrowers with columns for Alerts, Mess, Linked, Loan Number, Borrower Name, Loan Amount, Loan Officer, Loan Processor, and Current. A green arrow points to the row for 'Test - Kristen, AppraisalTek2'.

Alerts	Mess	Linked	Loan Number	Borrower Name	Loan Amount	Loan Officer	Loan Processor	Current
2			170400011	Test - Bill 2, AppraisalTek	212,500.00			Adm
2			170500015	test - bill 4, AppraisalTek- Mas	212,500.00			Adm
			170400006	Test - Bill, AppraisalTek1	212,500.00			Adm
2			170400010	Test - Brianna, AppraisalTek	212,500.00			Adm
2			170500013	Test - dont use, AppraisalTek	212,500.00			Adm
2			170500014	Test - dont use, AppraisalTek	212,500.00			Adm
2			170400007	Test - Kristen, AppraisalTek2	212,500.00			Adm
2			170400012	Test - Mark 2, AppraisalTek	212,500.00			Adm
2			170400008	Test - Mark, AppraisalTek	212,500.00			Adm
2			170400005	Test - Robert, AppraisalTek	212,500.00			Adm

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.

The screenshot displays the Encompass software interface. At the top, the navigation bar includes 'Encompass', 'View', 'Loan', 'Forms', 'Verifs', 'Tools', 'Services', and 'Help'. Below this, a secondary navigation bar has 'Home', 'Pipeline', 'Loan', 'Trades', 'Contacts', 'Dashboard', and 'Reports'. The 'Loan' tab is highlighted with a red box. The main content area shows the 'Borrowers' section for 'Glen Fulps'. Loan details include: 1306 E Fillmore St, Phoenix, AZ 85006; Loan #: 83250186; LTV: 78.723/78.723/78.723; Rate: 3.200%; Est Closing Date: //; Loan Amount: \$111,000.00; DTI: /; Not Locked; FS: Admin User. A 'Submittal Worksheet' section contains fields for Loan Officer, Loan Processor, and Underwriter, along with 'Days to Finish' (-32) and '04/11/2020 03:05 PM'. A 'Required Fields' section is visible at the bottom. In the left sidebar, the 'Order Appraisal' option is highlighted with a red box, and a green arrow points to it.

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 Appraisal

My Appraisers **All Appraisers**

Search All Appraisers By

Zip Code 94588 Location CA Alameda

Lender All Lenders

Appraisal Type Full Residential Appraisals with Interior Inspections

Matching Appraisers (256) Add to My Appraisers

Company Name	Price	Turn Time	Profile
Appraisals2U - ValueLink	Per contract	Per contract	More Info
AppraisalTek	Per contract	Per contract	More Info
Appraisal Tek	\$ 0.00	5 Days	More Info
AppraiserLoft	Per contract	Per contract	More Info
Appraisers Direct, Inc.	Per contract	Per contract	More Info
AppraiserVendor.com	\$ 485.00	7 Days	More Info
ARIVS	Per contract	Per contract	More Info
Atlantic Assurance (Appraisal)	Per contract	Per contract	More Info
Atlantic1 Appraisal Management	Per contract	Per contract	More Info
Avisso Appraisal Management	\$ 475.00	7 Days	More Info

Next

Order Appraisal

My Appraisers All Appraisers

My Appraisers (1)

Company Name	Profile
AppraisalTek	More Info
AppraisalTek - Direct Integration	More Info

Next...

Order an Appraisal

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

Login Information

Username

Password

Save Log In Information

[AppraisalTek Interface Tutorial](#)

Login Information

Username

Password

Save Log In Information

Loan Information

Borrower: **Glen Fulps**
Property: **1306 E Fillmore St
Phoenix AZ 85006**
Loan Reference: **83250186**
FHA Case Num:

Order: [Contacts / Communication](#) | [Status / Messaging / Documents / Payment](#)

New Order Existing Order

Products

- Single Family (Form URAR-1004 with 1004MC)
- Manufactured (Form 1004C with 1004MC)
- 2-4 Unit Residential Field Review (Form 2000A)
- Compliance Inspection Report/Final (Form CIR)
- Condo (Form 1073 with 1004MC)
- Texas Desk Review
- Drive by (2055,1075,2095,1025,1004C)(Covid-19)

Report Type: Residential
Delivery Method: Standard
Complex Property:
Rural:
Loan Type: Conventional
Transaction Type: Refinance
Sales Price: 141,000.00
Seller Contributions Concessions: 0
Requested Due Date: 4/ 2/2020

Order Notes To AppraisalTek

Client Profile Emails: markv@appraisaltek.com
Additional Order Email(s):
Notes for Appraiser:

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

Custom Communication Users

Save Log In Information FHA Case Num **023-1234567**

Order Contacts / Communication Status / Messaging / Documents / Payment

Borrower
Full Name:
Phone:
Additional Phone:
Email:

CoBorrower
Full Name:
Phone:
Additional Phone:
Email:

Realtor
Name:
Phone:
Email:

Intended User
Name:
Street Address:
City:
State: Zip:

Admin Email:
Appraisal Desk Email:

Loan Officer **Processor** **Underwriting**

markv@appraisaltek.com
 usman@appraisaltek.com
 hamza@appraisaltek.com

Choose the Loan Officer, Processor, etc. that are associated with this loan. You can make more than one selection.

Order Number 301255 - New Exit

Custom Email Settings

Loan Officer Email
 [Select all]
 Hamza@appraisaltek.com
 Kathryn@appraisaltek.com
 Markv@appraisaltek.com
 Usman@appraisaltek.com

Processor Email
 [Select all]
 Brenda@appraisaltek.com
 Hamza@appraisaltek.com
 Marktvitt@gmail.com
 Usman@appraisaltek.com

Underwriting Email
 [Select all]
 Usman@appraisaltek.com

Appraisal Desk Email
 [Select all]

Branch Manager Email
 [Select all]
 Hamza@appraisaltek.com
 Markv@appraisaltek.com
 Usman@appraisaltek.com

Appraisal Information

Order Status: New
Requested Complete Date: November 2, 2020
Appraisal Type: Unknown
Sale Price: \$1200000
Seller Contrib. Concessions (dollars only): \$0

Note - Appraiser to verify purchase price and Seller concessions

You can login anytime to AppraisalTek and modify your selections.

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.

Username: slappy1
Password: *****
 Save Log In Information

Borrower: **Glen Fulp**
Property: **1306 E Fillmore St
Phoenix AZ 85006**
Loan Reference: **83250186**
FHA Case Num

Order: Contacts / Communication | Status / Messaging / Documents / Payment

New Order Existing Order 268368

Products:
 Single Family (Form URAR-1004 with 1004MC)
 Manufactured (Form 1004C with 1004MC)
 2-4 Unit Residential Field
 Compliance Inspection R
 Condo (Form 1073 with 1
 Texas Desk Review
 Drive by (2055,1075,209

Report Type: Residential
Delivery Method: Standard

AppraisalTek
Your order has been successfully submitted and your order number is 273800.

Order Notes To AppraisalTek
Please use an appraiser from our preferred panel

Requested Due Date: 5/14/2020

Client Profile Emails: markv@appraisaltek.com
Additional Order Email(s): lmaLoanofficer@Money.com
Notes for Appraiser: Please do not inspect before 12:00, small children at home

Order: Contacts / Communication | Status / Messaging / Documents / Payment

Date	Order#	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:41 PM	268368	Full Desktop Appraisal (1004...	Canceled
4/2/2020 4:32 PM		Small Income Residential 2-4 ...	Canceled
4/2/2020 4:18 PM		Full Desktop Appraisal (1004	Canceled

Messaging

Date	Sender
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Completed Appraisal Documents

Document

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”.

Order | Contacts / Communication | **Status / Messaging / Documents / Payment**

Date	OrderId	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:18 PM	268368	Full Desktop Appraisal (1004...	Canceled
4/2/2020 4:32 PM	268363	Small Income Residential 2-4 ...	Canceled
4/2/2020 4:18 PM	268356	Full Desktop Appraisal (1004...	Canceled

Messaging

Date	Sender
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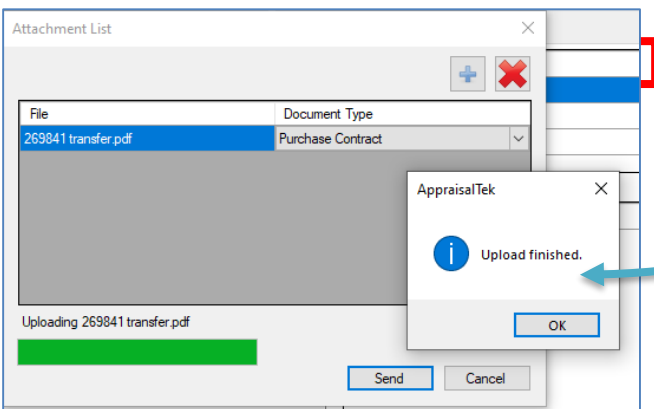
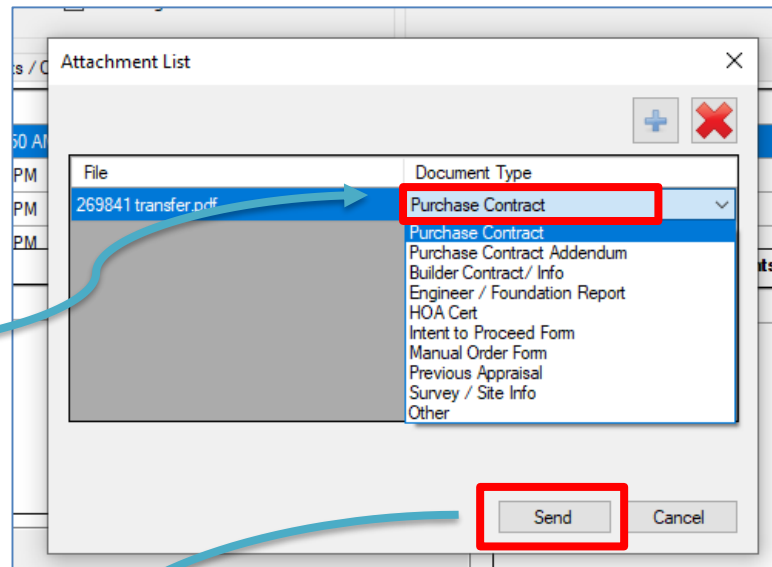
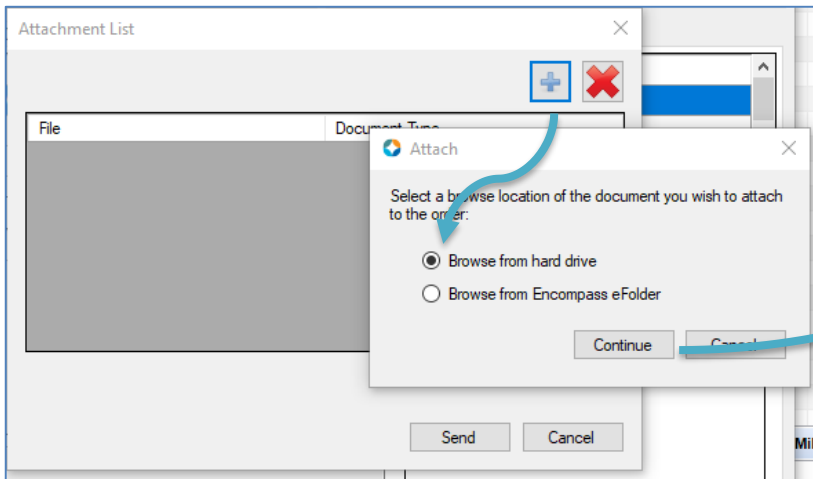
Completed Appraisal Documents

Document

Add Message | **Upload Documents** | Add Payment | Check Status | Close

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.

Order Contacts / Communication Status / Messaging / Documents / Payment

Date	Orderid	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:41 PM	268368	Full Desktop Appraisal (1004,...	Canceled
4/2/2020 4:32 PM	268363	Small Income Residential 2-4 ...	Canceled
4/2/2020 4:18 PM	268356	Full Desktop Appraisal (1004...	Canceled

Messaging

Date	Sender
5/14/2020 12:07 PM	Uploaded - Purchase Contract
5/14/2020 11:58 AM	Uploaded - Purchase Contract
5/14/2020 11:50 AM	Encompass (Auto)

Client Purchase Contract uploaded to AppraisalTek

Completed Appraisal Documents

Document

Add Message Upload Documents Add Payment Check Status Close

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

Completed Appraisal Documents

Document

Combined Compliance Docs

Invoice

SSR_FannieMae

SSR_FreddieMac

Appraisal (extracted)

Appraisal (MISMO XML format)

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”.

The screenshot displays a software interface for checking appraisal order status. At the top, there are tabs for 'Order', 'Contacts / Communication', 'Status / Messaging / Documents / Payment', and 'Payment'. Below these is a table of appraisal orders:

Date	OrderId	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:41 PM	268368	Full Desktop Appraisal (1004...	Canceled
4/2/2020 4:32 PM	268363	Small Income Residential 2-4 ...	Canceled
4/2/2020 4:18 PM	268356	Full Desktop Appraisal (1004...	Canceled

Below the table is a 'Messaging' section with a table of messages:

Date	Sender
5/14/2020 12:07 PM	Uploaded - Purchase Contract
5/14/2020 11:58 AM	Uploaded - Purchase Contract
5/14/2020 11:50 AM	Encompass (Auto)

At the bottom of the messaging section, there is a text area containing the message: 'Client Purchase Contract uploaded to AppraisalTek'.

At the bottom of the interface, there are several buttons: 'Add Message', 'Upload Documents', 'Add Payment', 'Check Status', and 'Close'. The 'Check Status' button is highlighted with a red box.

An information dialog box is open over the 'Check Status' button, titled 'AppraisalTek'. It contains an information icon and the text: 'The status of your order is New.' The text is highlighted with a red box. An 'OK' button is located at the bottom of the dialog box.

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

The screenshot displays the AppraisalTek software interface. At the bottom, a 'Check Status' button is highlighted with a red rectangular box. A green arrow points from this button to a pop-up message box. The message box contains an information icon (a blue circle with a white 'i') and the text 'The status of your order is In Review.' Below the message is an 'OK' button. The background interface shows a table with columns for Date, OrderId, Products, and Status. The first row is highlighted in blue and shows a 'New' status for a 'Single Family (Form URAR-10...' product. Below the table is a 'Messaging' section with a table of messages. At the bottom of the interface, there are buttons for 'Add Message', 'Upload Documents', 'Add Payment', 'Check Status', and 'Close'.

Date	OrderId	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:41 PM	268368	Full Desktop Appraisal (1004...	Canceled
4/2/2020 4:32 PM	268363	Small Income Residential 2-4 ...	Canceled
4/2/2020 4:18 PM	268356		

Date	Sender
5/14/2020 12:07 PM	Uploaded - Purchase C...
5/14/2020 11:58 AM	Uploaded - Purchase C...
5/14/2020 11:50 AM	Encompass (Auto)

Client Purchase Contract uploaded to AppraisalTek

Buttons: Add Message, Upload Documents, Add Payment, Check Status, Close

Pop-up Message: The status of your order is In Review. OK

Adding Comments

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

The screenshot displays the Encompass software interface. At the top, there are tabs for 'Order', 'Contacts / Communication', 'Status / Messaging / Documents / Payment'. Below these is a table with columns: Date, OrderId, Products, and Status. The table contains four rows of data. A green arrow points to the right side of this table. In the foreground, an 'Add Message' dialog box is open, containing the text 'The property is on lockbox and is vacant, thank you!'. A blue arrow points from the 'Add Message' button at the bottom of the dialog to the 'Add Message' button at the bottom of the main interface. The 'Add Message' button is highlighted with a red box. Below the dialog box, there is a 'Completed Appraisal Documents' section with a 'Document' table. At the bottom of the interface, there are several buttons: 'Add Message' (highlighted with a red box), 'Upload Documents', 'Add Payment' (highlighted with a green box), 'Check Status' (highlighted with a blue box), and 'Close'.

Date	OrderId	Products	Status
5/14/2020 11:50 AM	273800	Single Family (Form URAR-10...	New
4/2/2020 4:41 PM	268368	Full Desktop Appraisal (1004,...	Canceled
4/2/2020 4:32 PM	268363	Small Income Residential 2-4 ...	Canceled
	268356	Full Desktop Appraisal (1004	Canceled

Sender
Uploaded - Purchase Contract
Uploaded - Purchase Contract
Encompass (Auto)

Document

Client Purchase Contract uploaded to AppraisalTek

Buttons: Add Message, Upload Documents, Add Payment, Check Status, Close

Questions

Contact AppraisalTek with any questions!

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