



Triserv Appraisal Management Solutions

General Instructions for Checking Status

- ~ Log into the website using your assigned username and password.
- ~ Once you access the website, you will see your pipeline of appraisal orders. You can search by Order ID, Last Name, and Street Address.
- ~ You will find the current Status from the appraiser, Due Date and Scheduled Date on the front of the pipeline.
- ~ Click anywhere on the order line to pull up the order page.
- ~ You will find the Due Date and Status from the appraiser again in the top left corner of the page.
- ~ Comments can be added in the Notes Section which will be emailed directly to Triserv.

General Instructions for Ordering an Appraisal

- ~ Log into the website using your assigned username and password.
- ~ At the front of your pipeline, choose "Order an Appraisal".
- ~ Follow through the wizard selecting the Appraisal Type, Purpose, Loan Type, Form Type, etc.
- ~ Choose the appropriate Lender from the drop down box. Provide an accurate estimated value and zip code. The city and state will auto populate to ensure that you have the correct zip code for your order. Click on "Continue". ** Please be sure to get your estimated value as close as possible as the appraisal fee is based off the estimated value and zip code.
- ~ Once the order page opens, you can input the appraisal order information manually or import a FNMA 3.2 form. Choose "Import FNMA" at the top of the page and utilize the browse option to find the saved form. If the import does not happen within 2-10 seconds, the file may be corrupt and will not upload. The information must be inputted manually.
- ~ Include all names in the "Production Staff" that will also need to receive updates and the completed report. Only input each email address 1 time. ** Please note: If your information does not auto populate on the left side, please fill in and include the username email address. This is caused by staying logged in too long without activity. After you complete the order, log out for a few minutes, and then log back in to order additional appraisals.
- ~ Review the order page. If the borrower / co-borrower are the Primary Contact for Entry, utilize the check box to pull down their information (i.e. for refi). If an agent, seller, family member, etc. is the Primary Contact for Entry, please complete their information.

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General Instructions for Ordering an Appraisal Continued

~ Under "Property Information", the city, state, zip and county auto populate from the wizard. You will need to provide the street address. If the same as the borrower's current address, you can utilize the check box to pull down their information.

~ Under "Billing Information", provide the credit card information. The credit card does NOT run when you place the order. It is done manually prior to assigning to an appraiser. If the credit card information comes back with a "Decline" or "Error" message, you will be notified. Discover, Visa and MasterCard have 16 digits, American Express has 15 digits.

~ Include specific instructions in the "Special Notations and Instructions" section. For example: Borrower is a day sleeper, contact after 3:00 pm. Seller will provide plat survey at time of inspection, etc.

~ If you have documents to include in the appraisal order (contract, survey, appraisal report, etc.), please upload those in the "Attach Documents" section.

~ Click "Submit Order" when you have completed the order page. If any necessary information is missing, you will be directed back to that section. Once the order is submitted, you should receive an order confirmation page with the assigned Order ID number. If you do not receive this email, please contact us to confirm that the order was received. ** Please note: If the confirmation page has blank borrower information, blank property information, etc., the order was not completed.

~ Once the appraisal order has been completed, you will receive an email with links to the report, invoice, HVCC/Appraiser's Independence Warranty, etc. You can access these files at any time once the order is completed by logging into the website and opening the order.

Additional Information

~ You can get an appraisal fee quote without ordering by utilizing "Price an Appraisal" and completing the similar wizard.

~ At the top of your confirmation page, you will find email addresses to utilize during your ordering process and after the order has been completed.

~ Recertification of Values are always fee quoted as are properties over \$1M.

~ Once an order is placed, you cannot go back in and change information or upload files. You can send a comment through the Notes Section or contact: info@triservllc.com with the corrections to be made or additional attachments.

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