



Broker Reference Manual

APPRAISAL MANAGEMENT SYSTEM

ORDER TRACK

PRINT YOUR APPRASIALS

Need Assistance? Use the following contacts:

<u>Regarding</u>	<u>Email</u>	<u>Phone</u>
Passwords/New Users	susan.anderson@inhouseusa.com	860-402-8337
Appraisals	connexions@inhouseusa.com	888-907-4507
Tech Support	connexions@inhouseusa.com	888-907-4507

Member
FDIC





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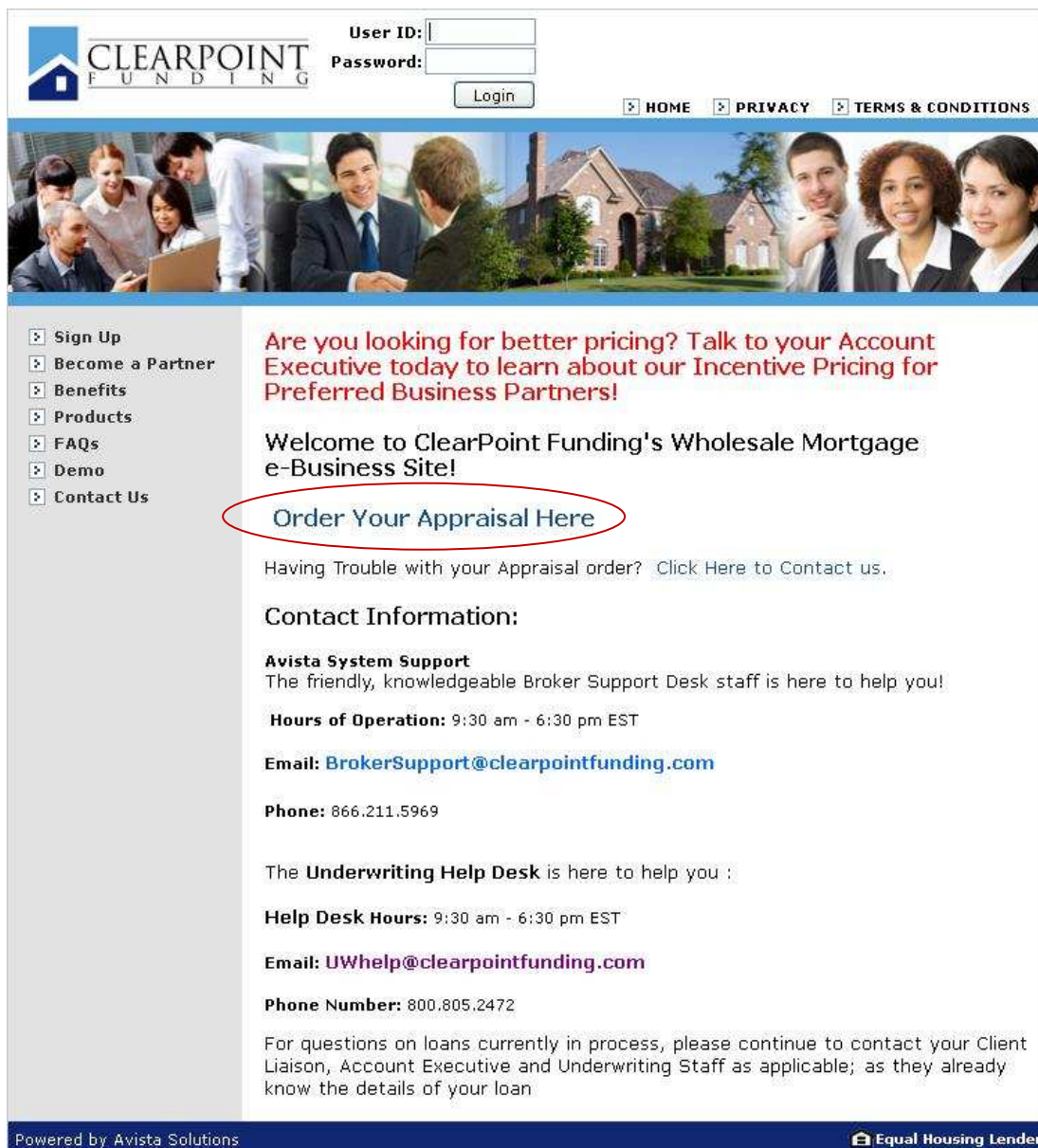
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How Do I Access the New AMC Rotation Solution?

All ClearPoint Funding Mortgage brokers should go to <http://els.clearpointfunding.com/> and click on the “Order your Appraisal” link, located in the main window.

Els.clearpointfunding.com – Home Page

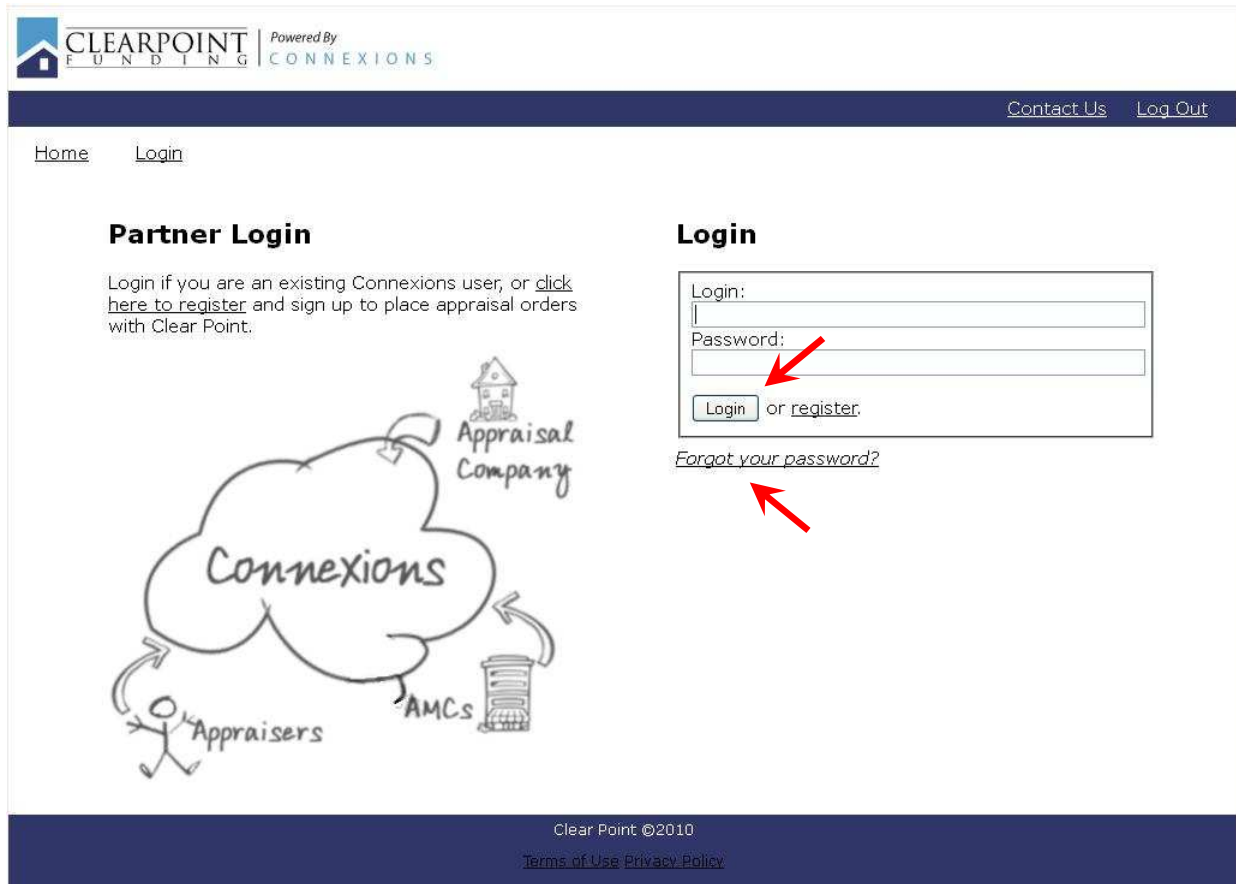


The screenshot shows the home page of the ElS.ClearPointFunding.com website. At the top left is the ClearPoint Funding logo. To its right are input fields for 'User ID:' and 'Password:', followed by a 'Login' button. Further right are links for 'HOME', 'PRIVACY', and 'TERMS & CONDITIONS'. Below the header is a large banner image showing a group of professionals in business attire. On the left side, there is a vertical navigation menu with links: 'Sign Up', 'Become a Partner', 'Benefits', 'Products', 'FAQs', 'Demo', and 'Contact Us'. The main content area features a red headline: 'Are you looking for better pricing? Talk to your Account Executive today to learn about our Incentive Pricing for Preferred Business Partners!'. Below this is a welcome message: 'Welcome to ClearPoint Funding's Wholesale Mortgage e-Business Site!'. A red circle highlights the link 'Order Your Appraisal Here'. Below the link is a text link: 'Having Trouble with your Appraisal order? Click Here to Contact us.'. The 'Contact Information' section includes 'Avista System Support' with a description, hours of operation (9:30 am - 6:30 pm EST), email (BrokerSupport@clearpointfunding.com), and phone (866.211.5969). It also includes 'Underwriting Help Desk' with a description, hours of operation (9:30 am - 6:30 pm EST), email (UWhelp@clearpointfunding.com), and phone number (800.805.2472). At the bottom, there is a footer with 'Powered by Avista Solutions' and the Equal Housing Lender logo.

After clicking on the link, you will see the login for the AMC Rotation Solution...

In order to log in you must already have a username and password. If you do not have a username and password, please contact your account executive and they will assist you in getting one.

Once on the site, you will see the **Partner Login** box (see image below). After entering your login name and password, click the “**Login**” button and you will be taken to the **Dashboard page**.



(If you do not know your password or have forgotten it, click on the “Forgot your Password” Link. It will ask for your Login and walk you through how to get a new Password).

How Do I Order and Pay for an Appraisal?

Once logged in, you will be able to perform the following tasks:

- Order an Appraisal
- Pay for the Appraisal Order
- Track the Status of the Order
- Receive the completed Appraisal Report
- Condition Appraisal Reports

Go to the **Request Appraisal** tab to place an order.

CLEARPOINT FUNDING | Powered By CONNEXIONS Welcome
Contact Us | Log Out
 Dashboard | View Orders | **Request Appraisal** | Reports | My Profile | Search

New Order

Select a Vendor
 -Choose AMC-

Appraisal Information
Accurate appraisal details will help ensure an accurate report the first time around.
 Request Location* Clear Point Funding
 Additional User -Additional Users-
 Additional User -Additional Users-
 Payment Type* -Payment Type-
 Transaction Type* -Transaction Type-
 Rush Order?* No: Yes: (Select "Yes" if you want a next day rush, which will incur additional fees)
 Rural Property?* No: Yes: (Select "Yes" if property is rural, will incur additional fees)
 Complex Property* No: Yes: (Select "Yes" if High Priced, Large Square Footage, Acreage) **Allows for more accurate pricing**
 Loan Number*
 Loan Type* -Loan Type- Case Number
 Property Type* -Property Type- **Will load up product menu**
 Products

Property Info
Please provide the Subject Property Address to be appraised.
 Street Num*
 Street Name *
 Unit Number
 City*
 State* -State-
 Zip*
 Purchase Price (*Please enter purchase price on all purchase orders.)


Buyer/Borrower Info
Provide accurate borrower information, as this information will be included on your report. For purchases, please make sure to provide access information.

Borrower First Name *	<input type="text"/>	Last Name*	<input type="text"/>
Home Number*	<input type="text"/>	Cell/Other Number	<input type="text"/>
Email Address* <input type="text"/>			
Co-Borrower First Name	<input type="text"/>	Last Name	<input type="text"/>
Home Number	<input type="text"/>	Cell/Other Number	<input type="text"/>
Email Address <input type="text"/>			
Contact First Name	<input type="text"/>	Last Name	<input type="text"/>
Phone 1 Number	<input type="text"/>	Phone 2 Number	<input type="text"/>
Relationship <input type="text"/>			


Files
Please do not forget to upload important documents. Any available documentation may help expedite the appraisal process.

Purchase Agreement	<input type="text"/>	<input type="button" value="Browse..."/>	(*Please upload purchase agreement on all purchase orders.)
Construction Plans/Specs	<input type="text"/>	<input type="button" value="Browse..."/>	
Preliminary Title Report	<input type="text"/>	<input type="button" value="Browse..."/>	
Condo/HOA Certification	<input type="text"/>	<input type="button" value="Browse..."/>	
Appraisal (for Review)	<input type="text"/>	<input type="button" value="Browse..."/>	
Other Document	<input type="text"/>	<input type="button" value="Browse..."/>	
Other Document	<input type="text"/>	<input type="button" value="Browse..."/>	

Upload documents at time of order to help ensure a smooth process.



Additional Comments



Please answer all questions as accurately as possible to ensure accurate processing and fee quotes.

Once you are done, click on **“Request Appraisal”**.

The next screen will request **Appraisal Payment** (screen shot on next page). You may choose either Credit Card or eCheck. If using eCheck, make sure you have a blank check available as you will be using routing and account numbers on the check.


Maximum Fee

The system will quote you a maximum fee for the appraisal. This fee is calculated based on the Fee Sheets provided by our Approved AMC Vendors. You may be charged a lower appraisal fee, but you will NOT be charged a higher fee. The final fee however, may still be subject to changed based on additional information and circumstances.

If you are working with a unique, complex or out of the area property, do not pay for the appraisal and request a quote before paying. Your order will be saved until you are ready to proceed.

Paid by Borrower?

Indicate the person who is paying for the appraisal. If the borrower did not pay for the appraisal, a ClearPoint Funding Mortgage Appraisal Coordinator may waive TILA’s 3 day wait period.


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[Dashboard](#) | [View Orders](#) | [Request Appraisal](#) | [Reports](#) | [My Profile](#) | [Search](#)

Thank you! We have received your appraisal request. Your order number is **7607**.

NOTE: We require payment for the appraisal at the time of order before proceeding with processing of your appraisal order.

To pay via ECheck, please use [this form](#). **The maximum fee is quoted.**

The fee should **not exceed \$395** (subject to change based on additional information and circumstances)

Is the borrower paying for this appraisal?:
 Yes: No: **Indicates the person who is paying for the appraisal. This may affect TILA.**

By clicking on this box, I certify that I am the card holder, or I have written authorization to process this Credit Card Payment on behalf of the card holder. Further, I agree to be charged for the appraisal fee listed above. **Credit card disclaimer and certification.**

Credit Card Information

Credit Card Number:

Credit Card Type:

Credit Card Expiration (MM/YYYY):

Billing Information

Name:

Billing Address 1:

Billing Address 2:

Billing City:

Billing State:

Billing Zip:

Billing Phone:

Billing Email:

(Entering an email address will speed up confirmation)

Once you are done, click on **Save Payment Information**.

Your appraisal will now be delivered to ClearPoint Funding, where a processor will approve your request. Once approved, the system will automatically select an AMC and your order will be processed.

When Will I Receive My Report Back?

ClearPoint Funding works with AMC Vendors whose Service Level Standards Turnaround Times vary from 5-7 days overall. Each appraisal ordered is issued a due date based on the TAT expectation so that those files which exceed our minimum standards can be identified and followed up on.

How Do I Check the Status / Progress of My Appraisal Order?

All AMC Vendors are required to confirm receipt of appraisal order, confirm a scheduled date/time of appraisal and to confirm delivery of the appraisal. In all cases, the system will automatically email you a status update.

If you have any urgent questions, please contact your ClearPoint Funding’s assigned account manager.

Another way to monitor your files is to use the systems monitoring tools. You can see ALL your files by clicking on

View Orders tab. The screen will look like below:

The screenshot shows the ClearPoint Funding system interface. At the top, there is a navigation bar with the following tabs: Dashboard, **View Orders** (circled in red), Request Appraisal, Reports, My Profile, and Search. Below the navigation bar, there are several status tabs: **In Process (123)** (circled in red), Completed (2244), Conditions (57), Canceled (161), On Hold (21), Missing Payment (5), and Assignment Issues (0). A red arrow labeled "Status Tabs" points to these tabs. Below the status tabs is a table with the following columns: Order ID, Requestor, Borrower(s), Address, Vendor, Status Date, Status, and Target Date (circled in red). The table contains four rows of appraisal orders.

Order ID	Requestor	Borrower(s)	Address	Vendor	Status Date	Status	Target Date
5361	Ryan Racicot	Donovan, Theresa	23 TOBIN ROAD, WEST ROXBURY, MA	InHouse Solutions	04/07/11 @ 12:54 pm	Vendor Accepted	04/13/11 @ 08:09 pm
5787	Alison Beltrone	Rickard, Marjorie	1870 SANDPIPER ROAD, VERO BEACH, FL	InHouse Solutions	03/25/11 @ 11:47 am	Inspected	02/10/11 @ 12:32 pm
5813	Carly Harrington	Abad, Victor Abi Graber, Jacques	11244 PECOS RIVER CT, RANCHO CORDOVA, CA	InHouse Solutions	02/09/11 @ 02:22 pm	Inspected	02/14/11 @ 12:55 pm
6174	Ginger Strader	EKMAN, DREW EKMAN, LISA	107 LAUREN LN, ATHENS, GA	Valuation Management Group LLC	04/05/11 @ 10:41 am	Vendor Accepted	04/11/11 @ 11:47 am

Status Tabs

In Process:

Completed:

Canceled:

On Hold:

Conditions:

Missing Payment:

Due Dates on the View Order Page are system generated and helps in identifying appraisal reports which are nearing or over acceptable Service Level Standards.

Description

Appraisal orders which are open.

Completed appraisal reports can be downloaded here.

These files cannot be re-activated. A new

A Temporary placeholder.

Appraisals with outstanding conditions.

Appraisal orders missing payment.

How Do I Know Which AMC / Appraiser Has My Order?

In **View Orders** tab, find your order under the appropriate Status Tab (For example "In Process"). Click on the address for the order you want to view and you will be directed to the order information screen. Under the box titled **"AMC/Appraiser Info,"** you will see which AMC/Appraiser you will need to contact.

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Appraisal ID: 5361

Appraisal Information

Property Type: Single Family Residence	Transaction Type: Refinance
Loan Type: FHA	Case Number: 251-4543206
Loan Number: 123456	Purchase Price:
Appraised Amount:	Target Date: 04/13/2011 09:09 pm CDT
	Report Delivery Date:

Products

Product	Amount	
1004 - Uniform Residential Appraisal Report	\$395	✗
Rush Fee	\$125	✗
FHA/HUD Add-On	\$75	✗
		+

Edit AMC/Appraiser
AMC/Appraiser Info:
 InHouse Solutions
 170 S Main St Suite# 204 Orange, CA 92868
 clearpointorders@inhouseusa.com
 888-824-8994

Schedule

Appraisal Appointment:

Status History

Status	Date	WhoSet
Vendor	04-07-2011	George Marankie
Accepted	12:54 pm	
Order	04-06-2011	Assignment Engine
Assigned	08:09 pm	
AMC	04-06-2011	Nationwide Property & Appraisal Services LLC
Rejected	08:08 pm	
Order	12-08-2010	Assignment Engine
Assigned	02:56 pm	
Vendor	12-08-2010	Sasheen Chisholm
Accepted	02:56 pm	
Canceled	12-03-2010	Assignment Engine
	12:40 pm	
Vendor	12-03-2010	Assignment Engine
Accepted	12:40 pm	
Order	12-03-2010	Assignment Engine
Assigned	12:35 pm	
Vendor	12-03-2010	Assignment Engine
Accepted	12:31 pm	
Order	12-03-2010	Assignment Engine
Assigned	12:30 pm	
Request	12-03-2010	Assignment Engine
Approved	12:30 pm	
	12-03-2010	

Property Information

Street Number: **State:**

You will also find the contact information for the AMC on all automated status emails you will receive during the order process.

How Do I Make a Payment After the Order Has Been Placed?

Go the **Missing Payments** tab and find your order in the list. Click on the green dollar sign next to your order, under the **“Enter Payment”** column, and you will be directed to the payment screen.

Order ID	Requestor	Borrower(s)	Address	Enter Payment	Cancel	Change to Billable
6336	merry sheehan	Surro,Michael Surro,Denise	1565 BRONCO HIGHWAY, GLENDALE, RI	\$	<input type="checkbox"/>	<input type="checkbox"/>
6412	Chris Wasiolek	Garro,Camille	350 North Street #303, Boston, MA	\$	<input type="checkbox"/>	<input type="checkbox"/>
7113	Stacey Nielsen	Seekatz,Robert G Seekatz,Susan	12732 CHARMAINE LANE, SANTA ANA, CA	\$	<input type="checkbox"/>	<input type="checkbox"/>
7607	Stephanie Creech	Test,Test Case,Case	123 Test Street, Test, MA	\$	<input type="checkbox"/>	<input type="checkbox"/>

There, enter in the payment information.

How Do I Receive My Report?

All completed appraisals are located in the **Completed** tab. Simply click on the PDF icon to download/view the report. Some AMC’s also deliver a Certificate, which can be downloaded as well. **Make sure you email the completed appraisal to your Account Manager.**

Order ID	Requestor	Borrower(s)	Address	Vendor	Last Status	Status	Reports	App	Cert	Inv	Add Condition	Send Report
7540	Carol True	OTTO,ERIK J OTTO,KATHY	3 FIRST STREET, CHELMSFORD, MA	The Appraisal Hub	07/26/11 @ 11:40 am	Completed						
7524	James Tyson	Fluellen,Charles	5930 THROOP STREET, CHICAGO, IL	InHouse Solutions	07/26/11 @ 11:12 am	Completed						
7389	Paul Gancarz	Lasa,Claudia	5003 W WABANSIA AVE, CHICAGO, IL	InHouse Solutions	07/26/11 @ 11:06 am	Completed						
7487	Jeanne Vachon	Klipp,Shelley	8481 CARLA LANE, WEST HILLS, CA	InHouse Solutions	07/26/11 @ 10:34 am	Completed						

How Do I Request a Condition?

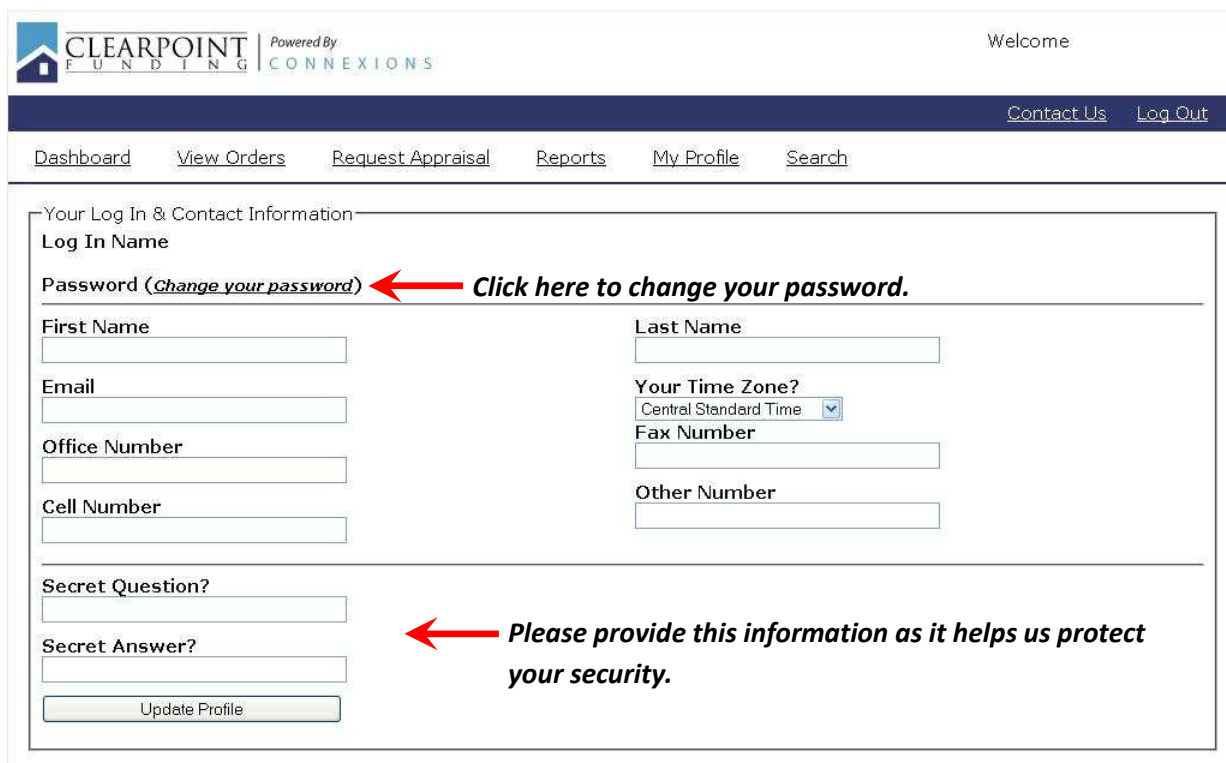
Locate your order under the **Completed** tab. In the column that is labeled Add/View Condition, click on the document icon and another Pop-up will appear. You can then add your condition and click ok. The condition will then be sent to the MAC that completed your order.

The screenshot shows the Clearpoint Funding appraiser interface. At the top, there is a navigation bar with 'Dashboard', 'View Orders' (circled in red), 'Request Appraisal', 'Reports', 'My Profile', and 'Search'. Below this is a status filter bar with 'In Process (123)', 'Completed (2245)' (circled in red), 'Conditions (57)', 'Canceled (161)', 'On Hold (21)', 'Missing Payment (4)', and 'Assignment Issues (0)'. The main table lists appraisal orders with columns for Order ID, Requestor, Borrower(s), Address, Vendor, Last Status, Status, Reports, App Cert Inv, Add Condition, and Send Report. The 'Add Condition' column for order 7524 is circled in red. A pop-up window titled 'Add New Conditions to the Appraisal' is open over the table, showing 'Conditions For 3 FIRST STREET' and a form to 'Add New Conditions:'. The 'Ok' button in the pop-up is highlighted with a red arrow.

Order ID	Requestor	Borrower(s)	Address	Vendor	Last Status	Status	Reports	App Cert Inv	Add Condition	Send Report
7540	Carol True	OTTO,ERIK J OTTO,KATHY	3 FIRST STREET, CHELMSFORD, MA	The Appraisal Hub	07/26/11 @ 11:40 am	Completed				
7524	James Tyson	Fluellen, Charles	5930 THROOP STREET, CHICAGO, IL	InHouse Solutions	07/26/11 @ 11:12 am	Completed				
7389	Paul Gancarz	Lasa, Claudia	5003 W WABANSIA AVE, CHICAGO, IL	InHouse Solutions	07/26/11 @ 11:06 am	Completed				
7487	Jeanne Vachon	Klipp, Shelley	8481 CARLA LANE, WEST HILLS, CA	InHouse Solutions	07/26/11 @ 10:34 am	Completed				

How Do I Change My Password and Other Information?

You can change your personal information from the [My Profile](#) tab.



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Your Log In & Contact Information

Log In Name

Password (*Change your password*) **← Click here to change your password.**

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email	Your Time Zone?
<input type="text"/>	Central Standard Time <input type="button" value="v"/>
Office Number	Fax Number
<input type="text"/>	<input type="text"/>
Cell Number	Other Number
<input type="text"/>	<input type="text"/>

Secret Question?

Secret Answer?

← Please provide this information as it helps us protect your security.