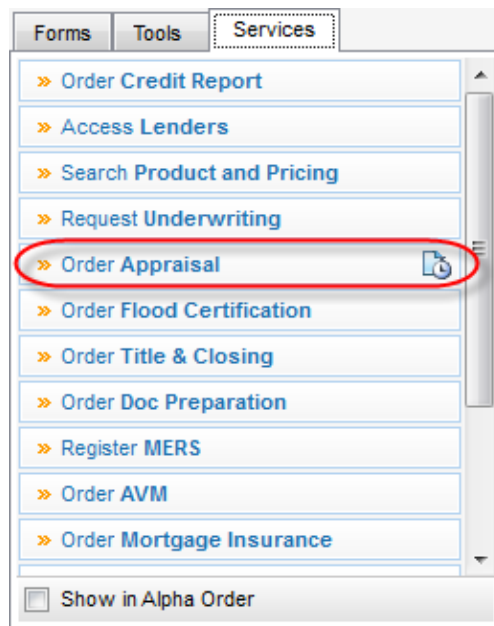


## CoesterVMS Direct Encompass Integration User Guide

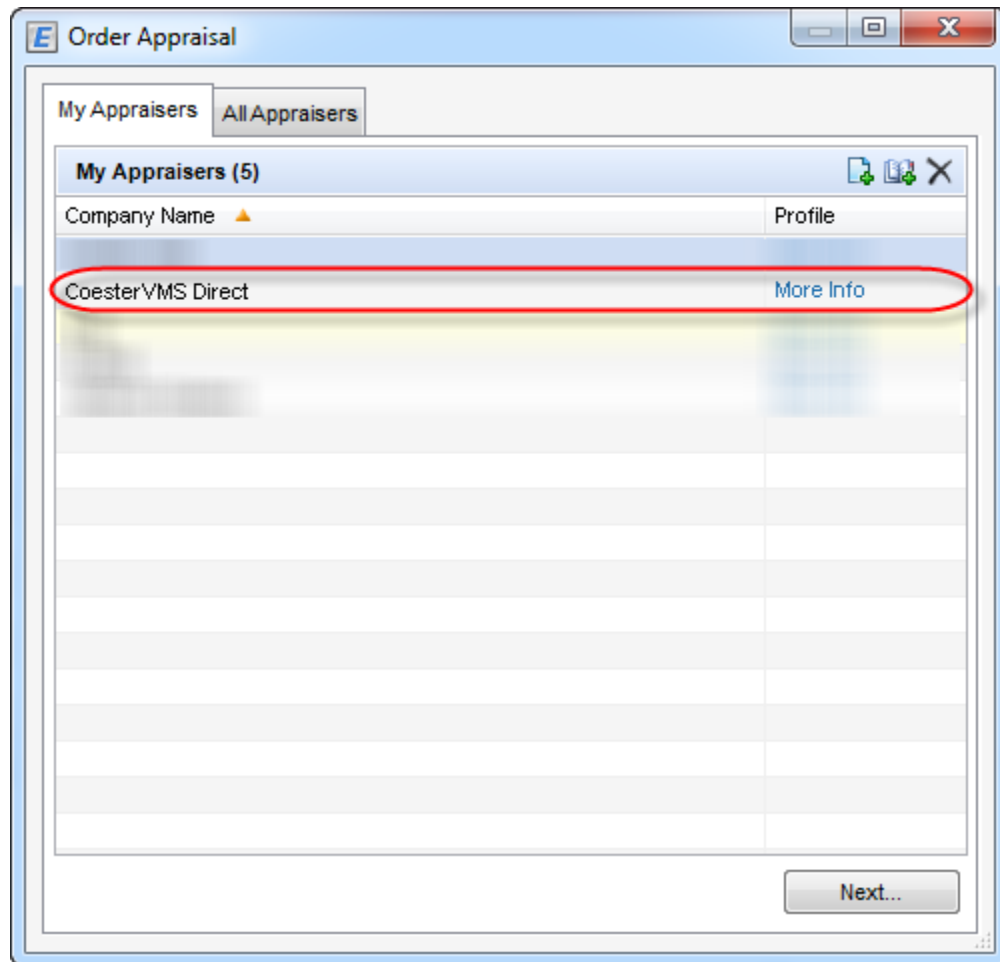
CoesterVMS developed its custom web services integration with Ellie Mae's Encompass® to enhance user efficiency by providing Cloud Control System tools directly in the solution. The information below details key tools, processes and options available through the interface.

### Selecting CoesterVMS as a Preferred Appraiser

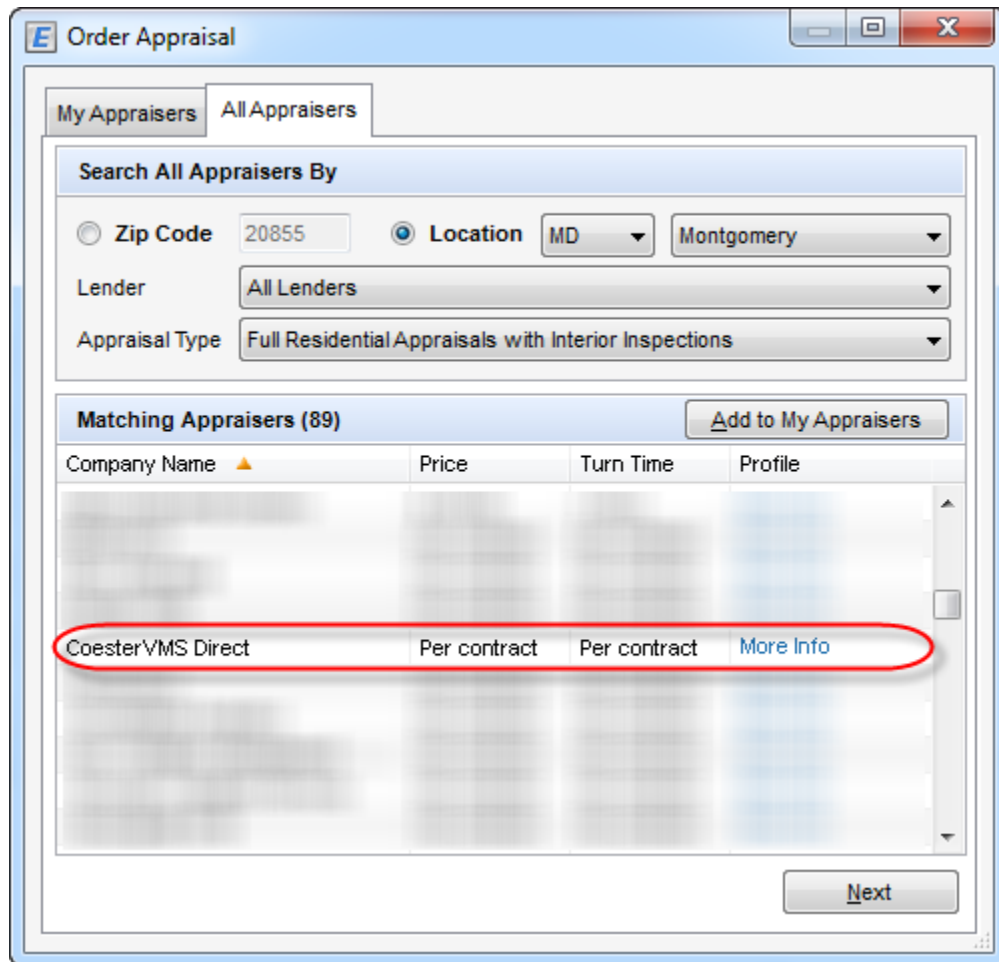
- Navigate to the Services tab in the loan file and select **Order Appraisal**:



- From the **Order Appraisal** window, users will see two tabs entitled **My Appraisers** and **All Appraisers**. If the user has already chosen CoesterVMS Direct as a preferred vendor, they will select CoesterVMS Direct from the **My Appraisers** list and proceed with order entry:



- > If CoesterVMS Direct has not yet been added to the **My Appraisers** pool, users will follow the steps below to make the selection:



The screenshot shows a web application window titled "Order Appraisal". It has two tabs: "My Appraisers" and "All Appraisers". The "All Appraisers" tab is active. Below the tabs is a search section titled "Search All Appraisers By" with the following filters:

- Zip Code: 20855
- Location: MD (dropdown), Montgomery (dropdown)
- Lender: All Lenders (dropdown)
- Appraisal Type: Full Residential Appraisals with Interior Inspections (dropdown)

Below the search filters is a section titled "Matching Appraisers (89)" with an "Add to My Appraisers" button. It contains a table with the following columns: Company Name, Price, Turn Time, and Profile.

Company Name	Price	Turn Time	Profile
CoesterVMS Direct	Per contract	Per contract	<a href="#">More Info</a>

The row for "CoesterVMS Direct" is highlighted with a red oval. At the bottom right of the window is a "Next" button.

- > Select the **All Appraisers Tab**
- > Scroll through the **Matching Appraisers** section or utilize the search function to identify CoesterVMS Direct
- > Highlight CoesterVMS Direct
- > Select the **Add to My Appraisers** option

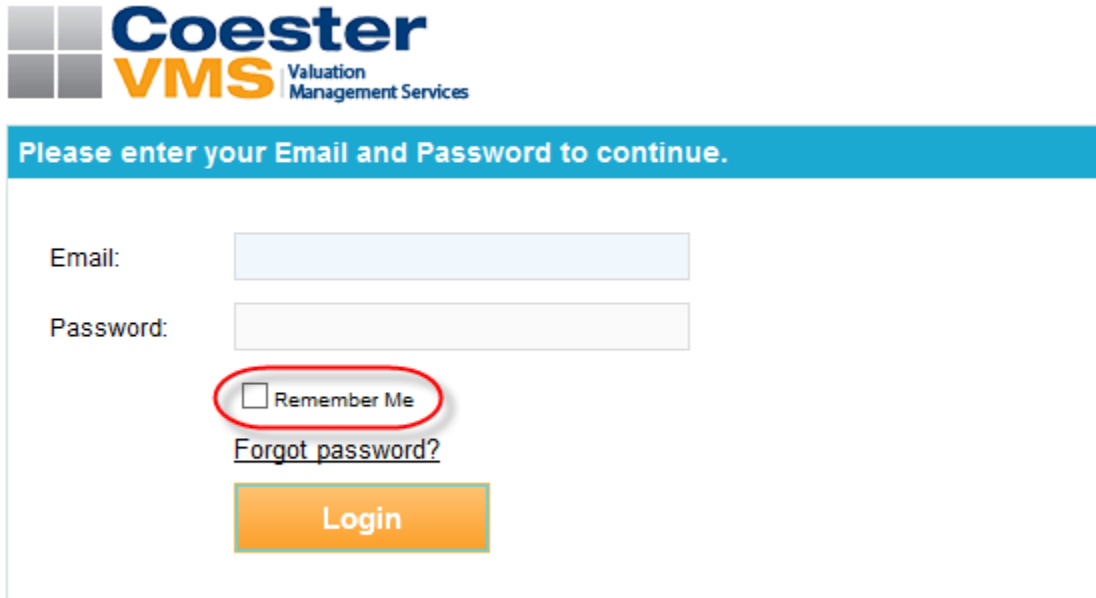
Once selected, CoesterVMS will populate to the **My Appraisers** tab on future orders.

**NOTE:** CoesterVMS' ePass integration will temporarily remain available to clients as they transition to the custom option.

## Placing an Appraisal Order

### Logging In

Upon selection of CoesterVMS Direct, the interface will populate in the **Services View** tab of Encompass. First time user will reach a login screen requesting their credentials to proceed:



The image shows a login screen for Coester VMS. At the top left is the Coester VMS logo. Below it is a blue header bar with the text "Please enter your Email and Password to continue." The main content area contains two input fields: "Email:" and "Password:". Below the password field is a checkbox labeled "Remember Me" which is circled in red. Below the checkbox is a link that says "Forgot password?". At the bottom of the form is an orange "Login" button.

> **NOTE:**

- CoesterVMS provides the credentials required to access the interface. Do not attempt to log in using an Encompass username and password.
- Selecting the **Remember Me** option will retain credentials and automatically log active users into new sessions.

### New Order Selection Menu

After successful log in, CoesterVMS systems will determine whether an order exists for the loan file associated with the session. If no orders are identified, a screen will populate offering users the option to place a new order or proceed to their pipeline:

CoesterVMS does not recognize an order has been placed for this loan.

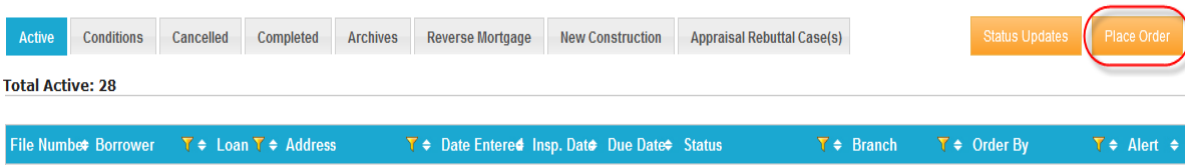
Would you like to proceed with order placement or check the status of other files in your pipeline?

Place Order

Manage Pipeline

**Note: All loan information will be stored on the order entry screen if you return during this session.**

- > The **Place Order** option directs users to the order entry screen described in the following section
- > The **Manage Pipeline** option opens the **Pipeline** menu, allowing users to view orders permitted by their user profile.
  - o **NOTE:** The interface stores applicable loan data in the order entry screen when users initially select they pipeline option. The **Place Order** option in the pipeline screen allows users to return to the screen at any time during the session:



Active Conditions Cancelled Completed Archives Reverse Mortgage New Construction Appraisal Rebuttal Case(s) Status Updates **Place Order**

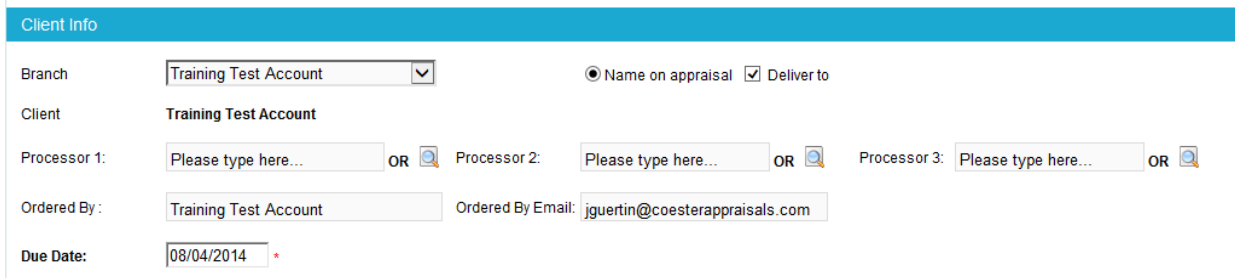
Total Active: 28

File Number Borrower Loan Address Date Entered Insp. Date Due Date Status Branch Order By Alert

### Order Entry Screen

The CoesterVMS Direct Integration populates a majority of necessary fields directly from the Encompass loan file. The steps below detail the fields and sections which require user input to place an order:

#### > Client Info Section



Client Info

Branch: Training Test Account  Name on appraisal  Deliver to

Client: Training Test Account

Processor 1:  OR  Processor 2:  OR  Processor 3:  OR

Ordered By: Training Test Account Ordered By Email: jguertin@coesterappraisals.com

Due Date: 08/04/2014 \*

User Input Fields		
Field Name	Description	Notes
Branch	Designates the branch or division associated with the order.	Defaults to the branch associated with the entering user. Selection options depend on account structure and user rights.
Processor(s)	Associates client users with the order.	Selected users receive email updates according to their notification settings. Use the Lookup option, indicated by the magnifying glass to the right of the field, to search for users.
Due Date	Indicates the date which the client requires report delivery.	Defaults to seven (7) calendar days from the entry date. Due dates less than three (3) business days from entry may require rush fees.

➤ **Assignment Info Section**

**Assignment info**

Residential | **Reviews** | Speciality Appraisals | BPO's

- FHA 1004 URAR with 1004MC - (\$450.00)
- FHA CONDO 1073 Uniform Residential Appraisal Report with 1004MC - (\$450.00)
- FHA 2 Unit Multi-Family (with 216 and 1007) - (\$630.00)
- FHA 3-4 Unit Multi-Family (with 216 and 1007) - (\$690.00)
- 1004C Manufactured Home FHA - (\$500.00)
- FHA 203K URAR with 1004MC - (\$450.00)
- FHA 203K URAR Manufactured with 1004C - (\$500.00)
- FHA 203K URAR with 1073MC - (\$450.00)
- USDA 1004URAR w/MC - (\$450.00)
- USDA 1073URAR w/MC - (\$475.00)
- 1004 URAR/Home Path - (\$475.00)
- Homestyle Renovation 1004 URAR w/1004MC - (\$475.00)
- Homestyle Renovation 1073 URAR w/1004MC - (\$475.00)
- Homepath 3-4 Unit Multi-Family (with 216 and 1007) - (\$690.00)
- 2055 Exterior - (\$330.00)
- 1075 Exterior Condo - (\$325.00)
- Disaster Area Inspection Report (DAIR) - (\$150.00)
- Interior/Exterior Disaster Area Inspection Report (DAIR) - (\$250.00)
- 1004D Cert of Completion/Final Inspection - (\$125.00)
- Compliance Inspection Report/CIR form HUD-92051 - (\$125.00)
- Summary Report - (\$250.00)
- 2075 Desktop Underwriter Property Inspection Report - (\$175.00)
- Construction to Perm (Value < \$1.5million) - (\$525.00)
- Construction to Perm (Value > \$1.5million) - (\$600.00)
- 2070 Loan Prospector @ Condition and Marketability Report - (\$175.00)
- 216 - Operating Income Statement - (\$75.00)
- 1007 Rent Schedule - (\$75.00)
- Trip Fee - (\$75.00)
- FHA Upgrade - (\$150.00)
- 216 & 1007 - (\$75.00)
- Conventional Loan Report Conversion - (\$150.00)

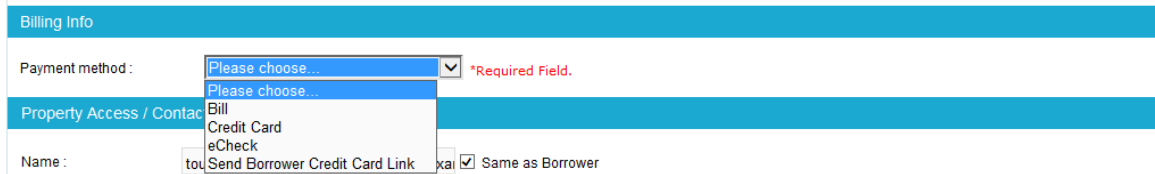
Intended Use :  \* Required Field

Occupancy :

Sale Price :  Estimated Value:  Loan Amount :

User Input Fields		
Field Name	Description	Notes
Product	Designates the product(s) associated with the order.	<ul style="list-style-type: none"> <li>Products populate based on the selection in the <b>FHA</b> field at the top of the order form.</li> <li>Users may select multiple products if necessary.</li> </ul>
Intended Use	Indicates the purpose of the property.	Certain options require additional documentation to proceed with entry. For example, selecting <b>Purchase</b> initiates a requirement to upload a document designated as a purchase contract.

> **Billing Info** Section



User Input Fields		
Field Name	Description	Notes
Payment Method	Designates the client’s preferred form of payment.	Access to “Bill,” or invoice the order to the client, is determined by user rights and account set up.
TILA Date	Allows the client to hold payment until the entered date has elapsed.	<ul style="list-style-type: none"> <li>Orders entered with a TILA Date in the future will not proceed until the date is met and remains in <b>Waiting for Approval</b> status.</li> <li>Specified users may approve orders to proceed prior to the originally entered date.</li> <li>Access to this field may be disabled based on the client’s preference.</li> </ul>


> **Property Access/Contact Info** Section

Property Access / Contact Info

Name :   Same as Borrower

Home Phone :  Work Phone :  Other Phone :

Contact Email:  Relationship:

Preferred Appt Date:   From:  To:

Preferred Appt Date2:  From:  To:

Preferred Appt Date3:  From:  To:

**User Input Fields**

Field Name	Description	Notes
Contact Information	Provides the point of contact for the appraiser to schedule the inspection.	<ul style="list-style-type: none"> <li>&gt; Fields default to the borrower's information. Deselect the <b>Same as Borrower</b> checkbox to clear the fields.</li> <li>&gt; Users must provide at least an email address to proceed with the order</li> </ul>
Relationship	Designates the Property Access Contact's association with the transaction	N/A
Preferred Appointment Date(s)	Allows users to provide the best appointment times based on the contact's schedule.	<ul style="list-style-type: none"> <li>&gt; This field is not required but expedites scheduling of the inspection.</li> </ul>

> **Notes/Special Instructions**

Client Info

Note / Special Instruction :

- Input any general information necessary to facilitate production of the appraisal report



> **Attach Files**

**Attach Files**

Choose Category:

**!** CoesterVMS is not responsible for documents containing any borrowers personal financial information(Copy's of Bank Statement, SSN, CC and Checking account information) that gets uploaded within the documentation.

[Note] Upload only .pdf, .Doc, .Docx, .txt, .xlsx, .xls files and Max.upload Size is 10MB.

- Attach any files information necessary to facilitate production of the appraisal report
- > Upon completion of all necessary fields, select the **Next** button to proceed to the **Order Confirmation** screen
  - **NOTE:** The interface will alert users of any required fields missing from the order entry screen

**Order Confirmation Screen**

Users will be directed to the order confirmation screen following completion of the necessary entry fields:

Coester Valuation Management Services - Order Confirmation
Account: Training Test Account

**File number:**[Please confirm your order to generate File #] PLEASE CONFIRM ORDER

**Order Detail**

Due Date: 08/05/2014 07:07 AM
<b>File Number:</b> [Please confirm your order to generate File #]
FHA Case #: 1234567890
<b>Inspection Date:</b>
<b>Estimated Delivery:</b>
<b>Name on appraisal:</b> Training Test Account
<b>Deliver to Client 1:</b> Yes
<b>Deliver to Client 2:</b> No
<b>Requires UAD Compliance:</b> Yes

- > Select the **Confirm Order** option to complete the order and assignment processes
- > If the order requires any adjustments select the **Revise Order** option at the bottom of the page to return to the previous screen:

Upload Files

Choose Category:

No file uploaded!

Revise Order

Confirm Order

> **NOTE:** Users may upload additional documents to the order from the order confirmation screen

Following order confirmation, the interface populates a menu allowing users to navigate to the **Order Details** page for the new order, or choose to open their order pipeline:

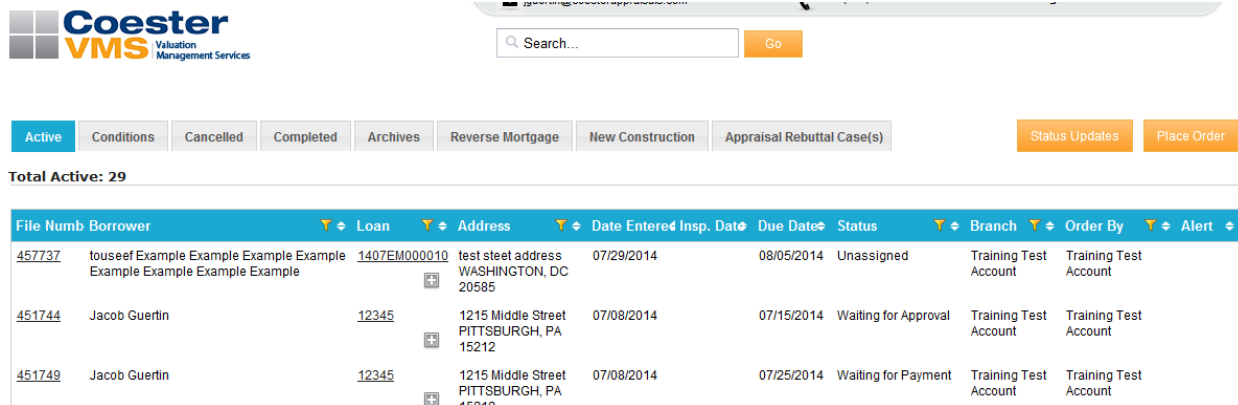
Coester Valuation Management Services Account: Training Test Account

Your order has been placed successfully , the file number is [REDACTED] we look forward to working with you and thank you very much.  
Your file is marked as Bill.  
Invoice Number: [REDACTED]

[Manage Pipeline](#) [Order Detail](#)

## Pipeline Management

The CoesterVMS Direct integration provides client users full access to their appraisal pipeline without leaving the Encompass Services View tab. The interface was designed to mimic the CoesterVMS Cloud Control pipeline to increase adoption levels for users already acclimated to the system.



**Coester VMS** Valuation Management Services

Search... Go

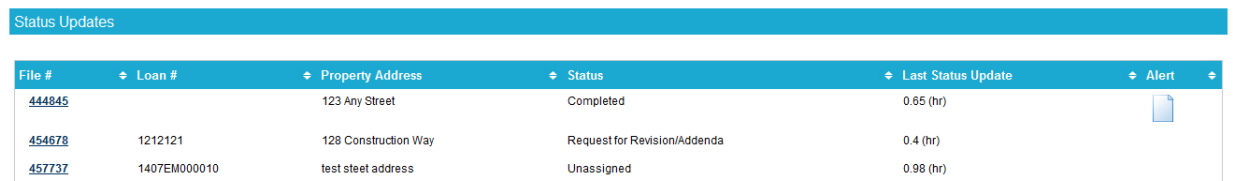
Active Conditions Cancelled Completed Archives Reverse Mortgage New Construction Appraisal Rebuttal Case(s) Status Updates Place Order

Total Active: 29

File Num	Borrower	Loan	Address	Date Entered	Insp. Date	Due Date	Status	Branch	Order By	Alert
457737	touseef Example Example Example Example Example Example Example Example Example Example	1407EM000010	test steet address WASHINGTON, DC 20585	07/29/2014		08/05/2014	Unassigned	Training Test Account	Training Test Account	
451744	Jacob Guertin	12345	1215 Middle Street PITTSBURGH, PA 15212	07/08/2014		07/15/2014	Waiting for Approval	Training Test Account	Training Test Account	
451749	Jacob Guertin	12345	1215 Middle Street PITTSBURGH, PA 15212	07/08/2014		07/25/2014	Waiting for Payment	Training Test Account	Training Test Account	

## Status Update Feed

The pipeline menu offers clients a live feed of recent changes in order status. Select the **Status Updates** button in the upper right corner to open the feed:



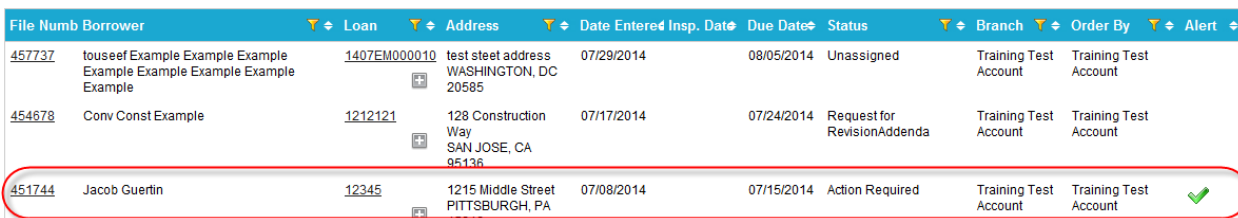
Status Updates

File #	Loan #	Property Address	Status	Last Status Update	Alert
444845		123 Any Street	Completed	0.65 (hr)	
454678	1212121	128 Construction Way	Request for Revision/Addenda	0.4 (hr)	
457737	1407EM000010	test steet address	Unassigned	0.98 (hr)	

## Order Alerts

In addition to the features available in Cloud Control, the Pipeline menu of the direct interface also contains an **Alerts** column indicating action is needed by the client.


- Active Orders
  - A green check mark appears in the **Alerts** column when an order enters **Action Required** status. This indicates CoesterVMS requires additional information or documentation from the client to proceed with the order:



File Num	Borrower	Loan	Address	Date Entered	Insp. Date	Due Date	Status	Branch	Order By	Alert
457737	touseef Example Example Example Example Example Example Example Example Example Example	1407EM000010	test steet address WASHINGTON, DC 20585	07/29/2014		08/05/2014	Unassigned	Training Test Account	Training Test Account	
454678	Conv Const Example	1212121	128 Construction Way SAN JOSE, CA 95136	07/17/2014		07/24/2014	Request for Revision/Addenda	Training Test Account	Training Test Account	
451744	Jacob Guertin	12345	1215 Middle Street PITTSBURGH, PA 15212	07/08/2014		07/15/2014	Action Required	Training Test Account	Training Test Account	✔

> Completed Orders

- A document icon appears in the **Alerts** tab when appraisal documents are available for upload to the Encompass eFolder:

File Number	Borrower	Loan	Address	Date Entered	Insp. Dt	Due Date	Status	Branch	Order By	Alert
444845	FHA Fixed A. Example	null	123 Any Street Santa Clara, CA 95050	06/18/2014		06/25/2014	Completed	Training Test Account	Training Test Account	

## Uploading Appraisals

The CoesterVMS Direct Integration allows users to upload documents related to an order to the eFolder associated with the loan file. Follow the steps below to complete the upload process:

- > Open the loan file associated with the order
- > Log in to the CoesterVMS Direct Interface
- > Navigate to the bottom of the **Order Details** page
  - This page automatically populates on loan files with existing orders
- > Review the **Synced Files** section to ensure desired documents were not synced previously by another user:

Synced Files	File Size	Categories	Date Synced	Synced By
Original Report	122.615 KB	Original Report	07/25/2014 17:13:24 pm	

- This step will avoid duplication of files in the eFolder
- > Select the specific files for upload by checking the boxes related to the documents:

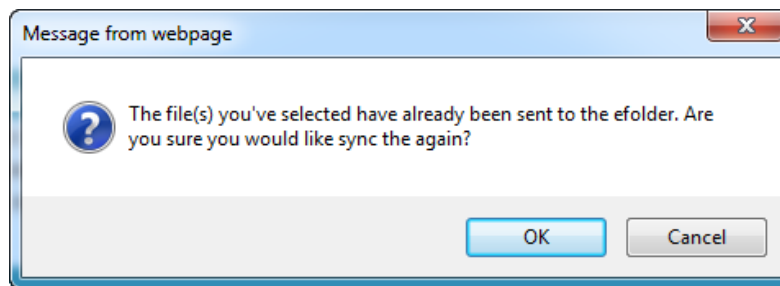
File Name	File Size	Categories	Date Created	<input type="checkbox"/>
Revised Report	238.303 KB	Revised Report	07/29/2014	<input type="checkbox"/>
XMLFile	1.947 MB	XMLFile	07/29/2014	<input checked="" type="checkbox"/>
Original Report	122.615 KB	Original Report	07/25/2014	<input type="checkbox"/>

OR

- > Enable the box in the header to select all:

File Name	File Size	Categories	Date Created	<input checked="" type="checkbox"/>
Revised Report	238.303 KB	Revised Report	07/29/2014	<input checked="" type="checkbox"/>
XMLFile	1.947 MB	XMLFile	07/29/2014	<input checked="" type="checkbox"/>
Original Report	122.615 KB	Original Report	07/25/2014	<input checked="" type="checkbox"/>

- **NOTE:** The interface alerts users when attempting to select previously synced files:

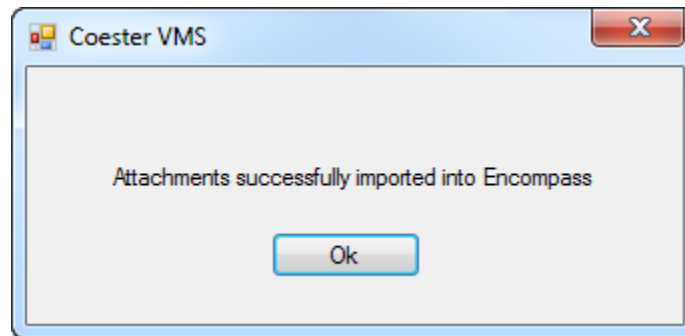


- > Click **Import to Encompass** to initiate upload of selected documents:

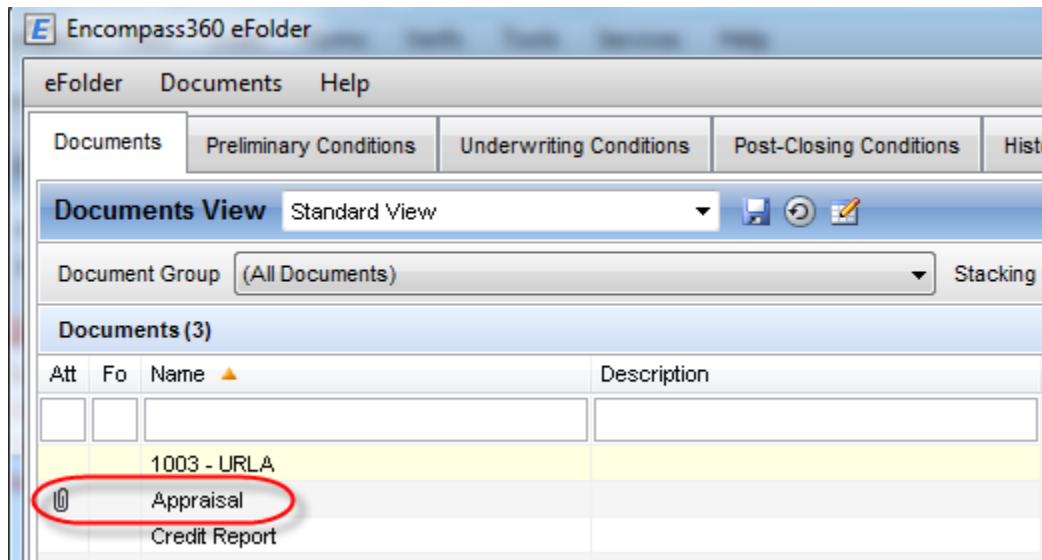
File Name	File Size	Categories	Date Created	
1003 - URLA - Revised Report - Original Report PDF	238.303 KB	Revised Report	07/29/2014	<input type="checkbox"/>
1003 - URLA - Revised Report - Original Report.xml	1.947 MB	XMLFile	07/29/2014	<input checked="" type="checkbox"/>
1003 - URLA - Revised Report - Original Report.pdf	122.615 KB	Original Report	07/25/2014	<input type="checkbox"/>

**Import to Encompass**

- > A notification will populate indicating successful upload:



- > Navigate to the eFolder and locate the folder entitled **Appraisal** to view the documents:



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