The Order Appraisal button is available at any status in LION, however, the system will only display 1 payment option if the intent to Proceed Date has not populated:

- POC Broker

Once we have the Intent to Proceed Date (meaning the Intent to Proceed has been signed), there are 2 payment options users can select:

- POC Borrower
- POC Broker

**Ordering Appraisals in LION**

1. **Click the Order Appraisal Tab under Tasks**
   
   On most loans, this will take you to the appraisal-ordering interface. However, certain states and loan programs (VA, Jumbo H, etc) require separate ordering processes. For these types, it will redirect you to the correct site to order your appraisal.
2. **Click Create Request**

![Create Request](image)

3. **The Appraisal Order Form will then be visible:**

   User must complete the red-numbered sections on the left-hand side and the credit card section on the bottom right-hand side.

   The Loan Information and Client Information sections on the right-hand side will auto-fill based on the loan info and user info.

![Appraisal Form](image)
Section 1: Subject Property

1. Click to Edit - opens the fields that must be completed

2. Click the Address drop-down and select the Subject Property from the list of properties displayed from your loan application

3. Once you select the Subject Property, the Property Type and Occupancy fields will auto-populate what you have in the loan application
Section 2: Report Assignment

1. Click to Edit – opens the fields that must be completed

2. Click the Report drop-down and select the applicable report you are ordering.
   If you are not sure about which report to select, ask your Manager and/or refer to the AUS Findings.

3. Once the Report is selected, the Vendor Assignment should auto-populate. Enter the Date Needed.
Section 3a: Billing Payment

1. Click to Edit – opens the fields that must be completed

2. Select Credit Card Borrower Paid or Credit Card Broker Paid (required if there is no Intent to Proceed in the system) from the Billing Payment Method drop-down

Section 3b: Credit Card

1. Click to Edit – opens the fields that must be completed
2. Complete all Credit Card fields

Section 4: Inspection Appointment

1. Click to Edit – opens the fields that must be completed
2. **Complete all applicable fields for the appointment contact person.**
   Be sure to add any notes of importance for the appraiser.

```
<table>
<thead>
<tr>
<th>Contact Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone 1:</td>
</tr>
<tr>
<td>Phone 2:</td>
</tr>
<tr>
<td>Phone 3:</td>
</tr>
<tr>
<td>Instructional Notes:</td>
</tr>
</tbody>
</table>
```

---

**Loan & Client Information**

1. **These should auto-populate based on the User and Loan.**

```
<table>
<thead>
<tr>
<th>Loan#: 9919090441</th>
</tr>
</thead>
<tbody>
<tr>
<td>FHA Case: Borrower/CoBorrower: TonyNC Testcase</td>
</tr>
<tr>
<td>Product Type: CONV</td>
</tr>
<tr>
<td>Loan Type: Purchase</td>
</tr>
<tr>
<td>Loan Amount: $250,000</td>
</tr>
<tr>
<td>Sale Price: $300,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lender: NEWREZ LLC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch: Wholesale 440-Inside</td>
</tr>
<tr>
<td>Ordered By: Joe Lewis (484) 594-1000</td>
</tr>
<tr>
<td>Ordered By Email: <a href="mailto:jlewis@ai.com">jlewis@ai.com</a></td>
</tr>
<tr>
<td>Additional Recipient?:</td>
</tr>
</tbody>
</table>
2. After completing a quick review of the sections just completed, click Create unless you want to click Exit to cancel the request.

3. Once finished, you will be re-directed to the Appraisal Home where your order will be visible. If it is not yet visible, click the green Reload button.

4. Once the order is accepted and assigned, you will then be able to View the order, use the Email Log to communicate with the AMC, and/or Upload to provide the Agreement of Sale or any other document the appraiser will need.

View: allows user to view the original order information that was entered. Payment Method is visible as well as the Comments entered. The user selects Close to exit the order form.

Email: includes the email history and provides the user with the ability to send a message to the AMC. If the user needs an update or correction made to the Appraisal Report, that request can be sent here. The email history includes a record of notifications sent to the Originator as well as the Processor if the AMC was instructed to do so.
Note: When an update/correction is requested, the report status will change from Complete to Revised. When the AMC sends the revised report to the User, it will also auto-upload to our system, and the status will change back to Complete.

Upload: allows the user to upload documents into the Interface, such as, the Agreement of Sale. Users can also view the documents the AMC has sent to the Interface such as, the Appraisal Report.

Appraisal Complete

When the appraisal is complete and ready to be delivered to the lender, the contacts in the file will receive an email that says:

Hi {{Name}},

The appraisal report for 9919080273 Rental Customer has been completed. Here are the links to the files:

- Appraisal/Final Report
- Appraiser Independence Certificate
- FNM Submission Summary Report
- FRE Submission Summary Report
- Invoice

Please allow up to 10 minutes for the documents to be fully uploaded into NewRez's paperless file manager.

Thank you for choosing NewRez! Please contact us with any questions or concerns.

Users no longer have to “fetch” a copy of the appraisal report. In addition to being automatically uploaded to our paperless file manager, it is now also emailed to the loan contacts.