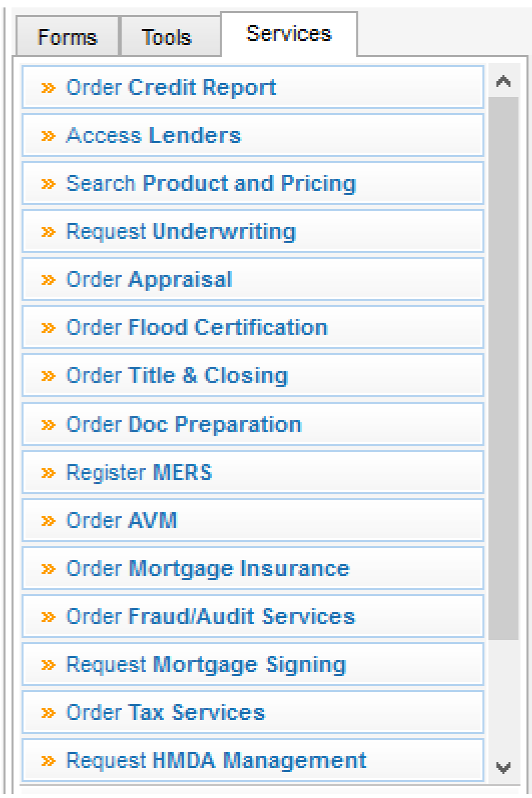
Using Heartland Valuation Service Software Appraisal Integration in Encompass 360

Lenders can utilize the new **Heartland Valuation** Software Appraisal Integration to submit Appraisal orders electronically from Encompass and obtain status updates and retrieve completed order details and documents.

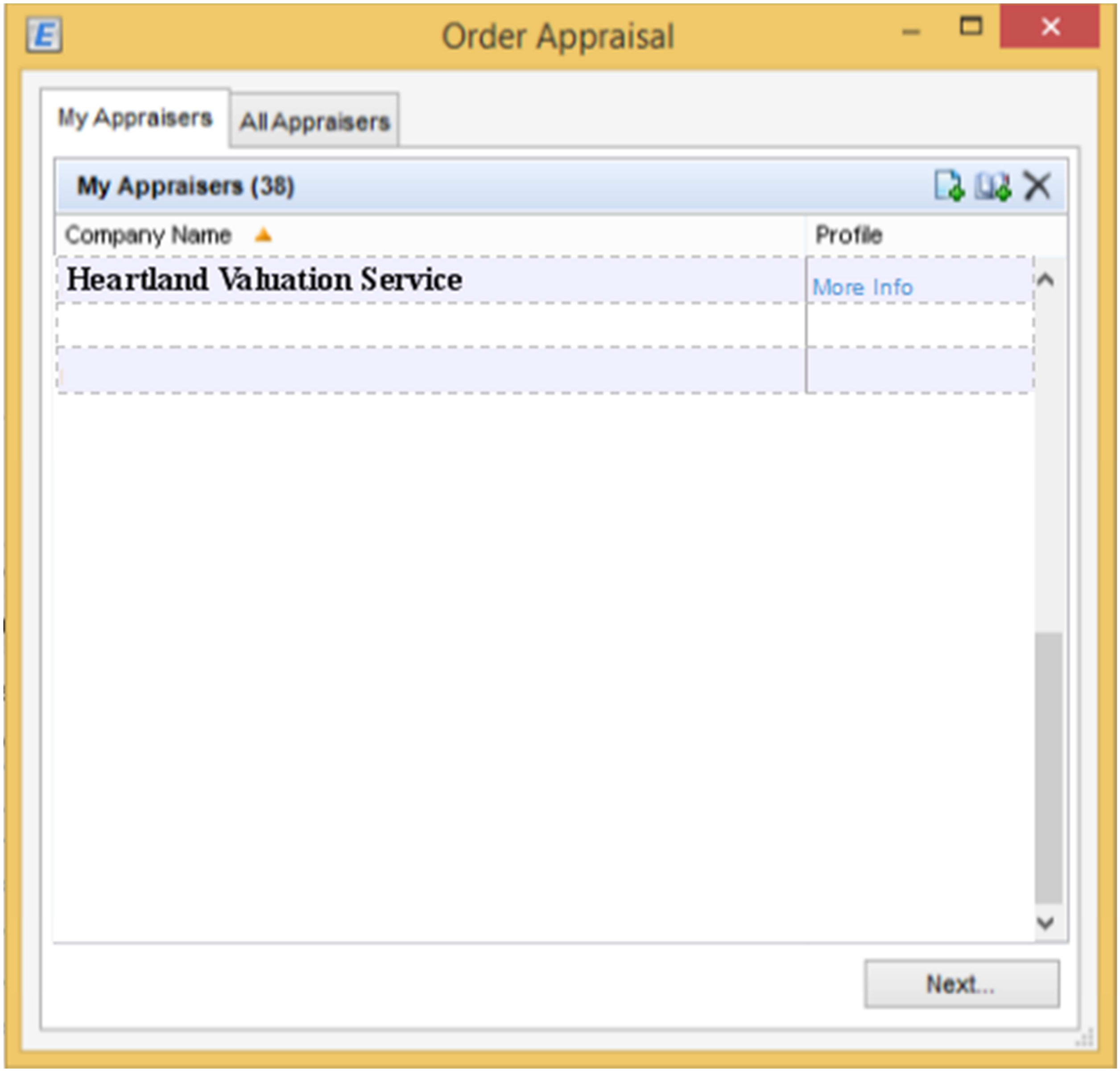
To access the integration and be able to submit appraisal orders, lenders must obtain credentials (username, and password) from preferred Service Provider.

Order Submission

To submit an appraisal order from within Encompass, first open the loan file, click on the **Services** tab on the lower left and then click on **Order Appraisal**.

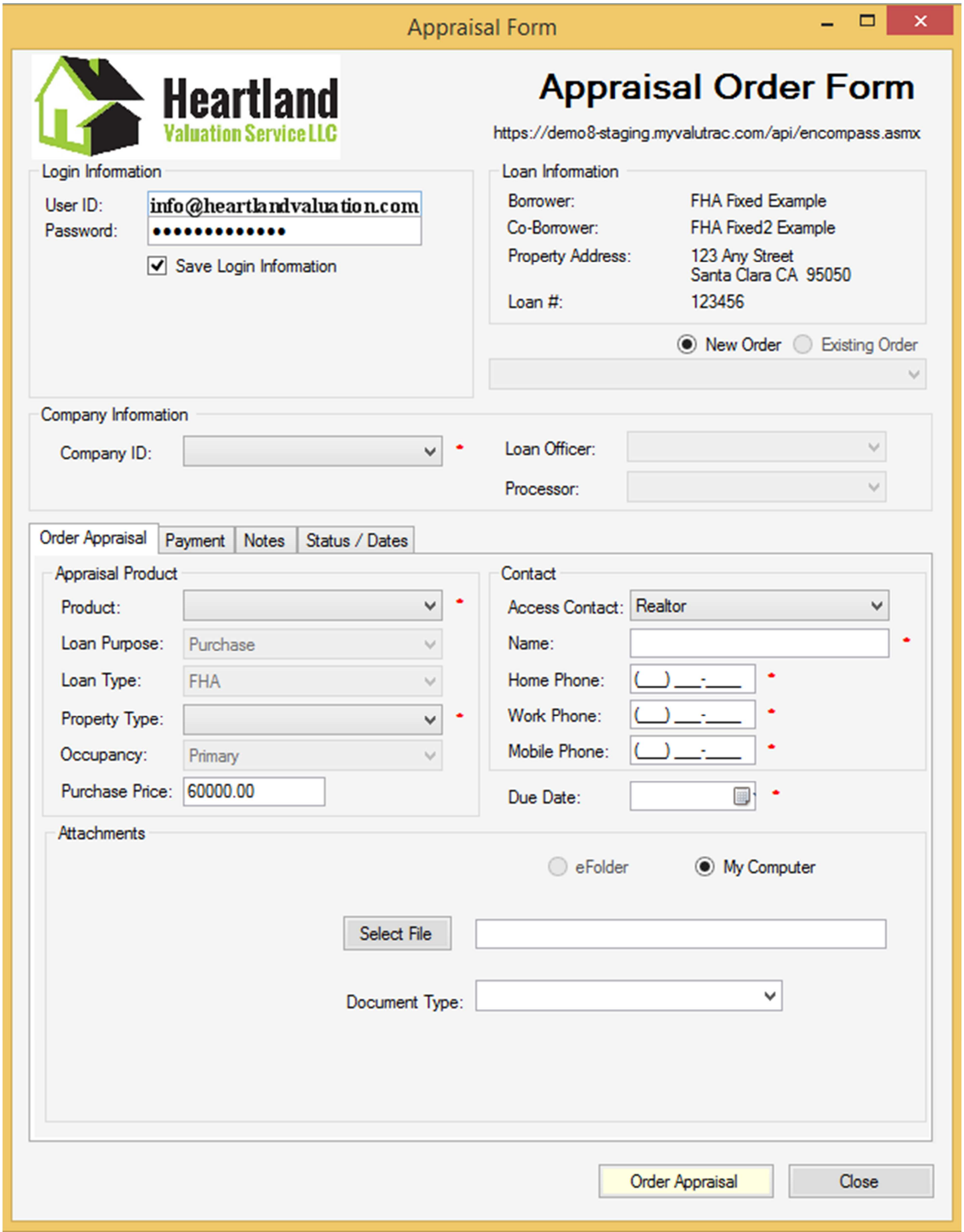


From the **My Appraisers** list, select your "Heartland Valuation Service Provider" and click **Next**. If they are not listed in your **My Appraisers** list, click on the **All Appraisers** tab and search for it in the list of Matching Appraisers and then click on **Add to My Appraisers**.



The **Heartland Valuation** Connection Integration Appraisal Order User Interface (UI) will be displayed. If your client credentials have already been entered and saved, Encompass will retrieve the possible values for Company ID, Loan Officer or Loan Processor, Product List, Property Type and Payment types and display it in the order UI. If you are entering the order UI for the first time, you have to enter the user name, password and click on the **Login** button to retrieve the settings. You can check the "Save Login Information" checkbox to remember your credentials so that you do not have to enter them each time.

Note: Client credentials are supplied by your Preferred Service Provider. If you are a new user, you can contact your Preferred Service Provider to setup your credentials; or for existing clients, they can help you reset your password.

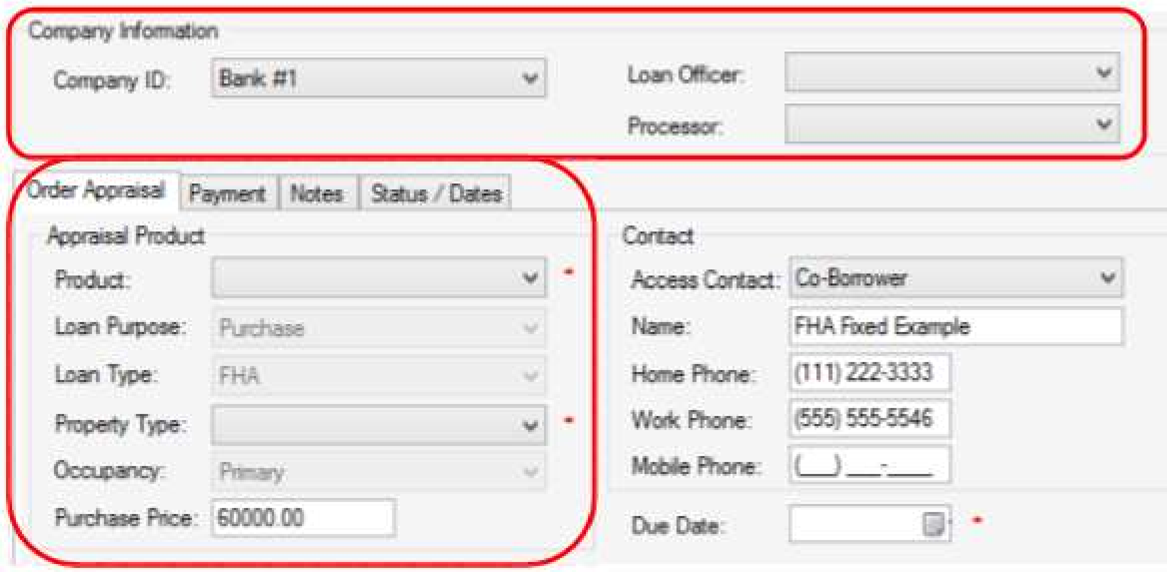


Appraisal Form
Heartland
Valuation Service LLC
Appraisal Order Form
https://demo8-staging.myvalutrac.com/api/encompass.asmx
Login Information
User ID: info@heartlandvaluation.com
Password:
Save Login Information
Loan Information
Borrower: FHA Fixed Example
Co-Borrower: FHA Fixed2 Example
Property Address: 123 Any Street
Santa Clara CA 95050
Loan #: 123456
New Order
Existing Order
Company Information
Company ID:
Loan Officer:
Processor:
Order Appraisal
Payment
Notes
Status / Dates
Appraisal Product
Product:
Loan Purpose: Purchase
Loan Type: FHA
Property Type:
Occupancy: Primary
Purchase Price: 60000.00
Contact
Access Contact: Realtor
Name:
Home Phone:
Work Phone:
Mobile Phone:
Due Date:
Attachments
eFolder
My Computer
Select File
Document Type:
Order Appraisal
Close

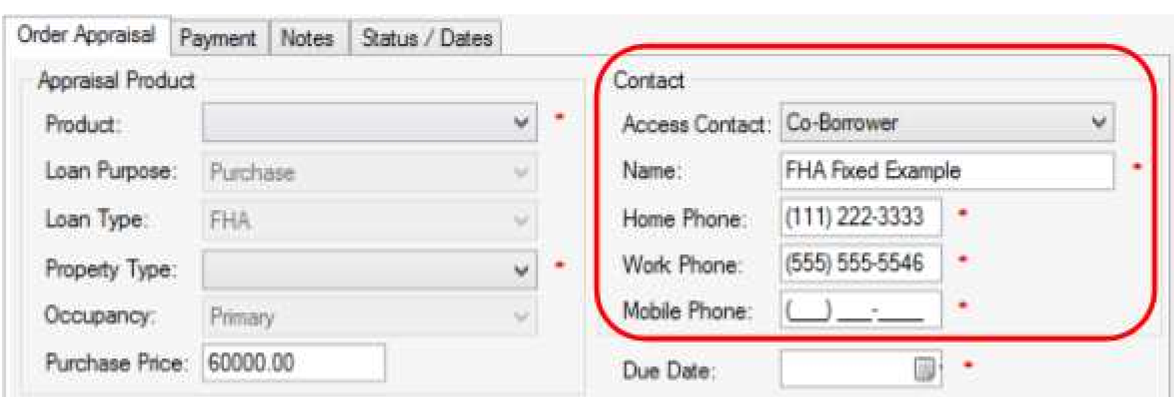
The Order UI will also be prepopulated with data from the loan file. There are certain required fields that should be completed prior to submitting an order and if those fields are missing, Encompass will indicate with a red exclamation mark. See example in the screen shot above where the loan is a FHA and the FHA Case number is missing in the loan file. User will have to close the UI and complete the FHA Case number prior to submitting the order.

The Loan Purpose and Loan Type will be defaulted if the value in the loan matches any of the options provided by your Preferred Service Provider.

The **Appraisal Product** section will contain all values available, dependent on the Company ID selected for the order, and the prepopulated information. Clicking the drop downs will reveal the available options.



The **Contacts** section allows the user to select the access contact, with information pre-populated from Encompass. This includes the Borrower, Co-borrower, Realtor or Other person.

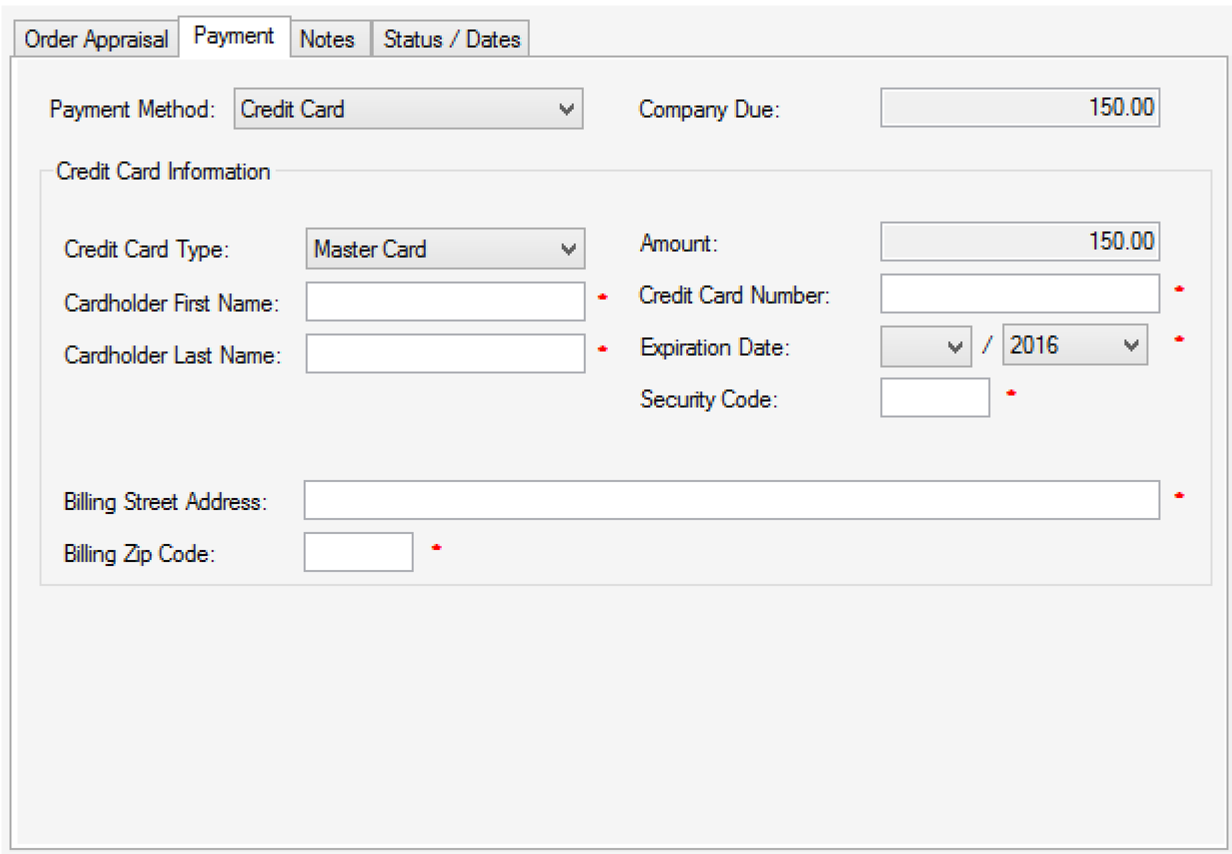


In addition to the Contact information, the **Due Date** for the Appraisal Order can be set here as well.

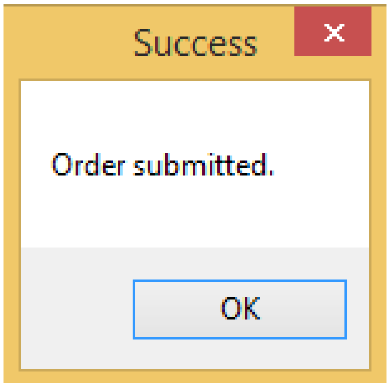
Visit the **Payment Tab** to submit the payment information for the order.

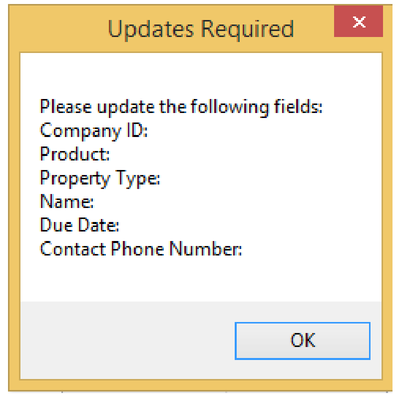
The available payment options for the selected client group are listed in the Payment Type drop down. After payment details have been added, click on the **Order Appraisal** button to submit the order.

Note: The credit card details are not stored in Encompass and are transmitted securely over the internet to your Preferred Service Provider's Merchant Account Services.



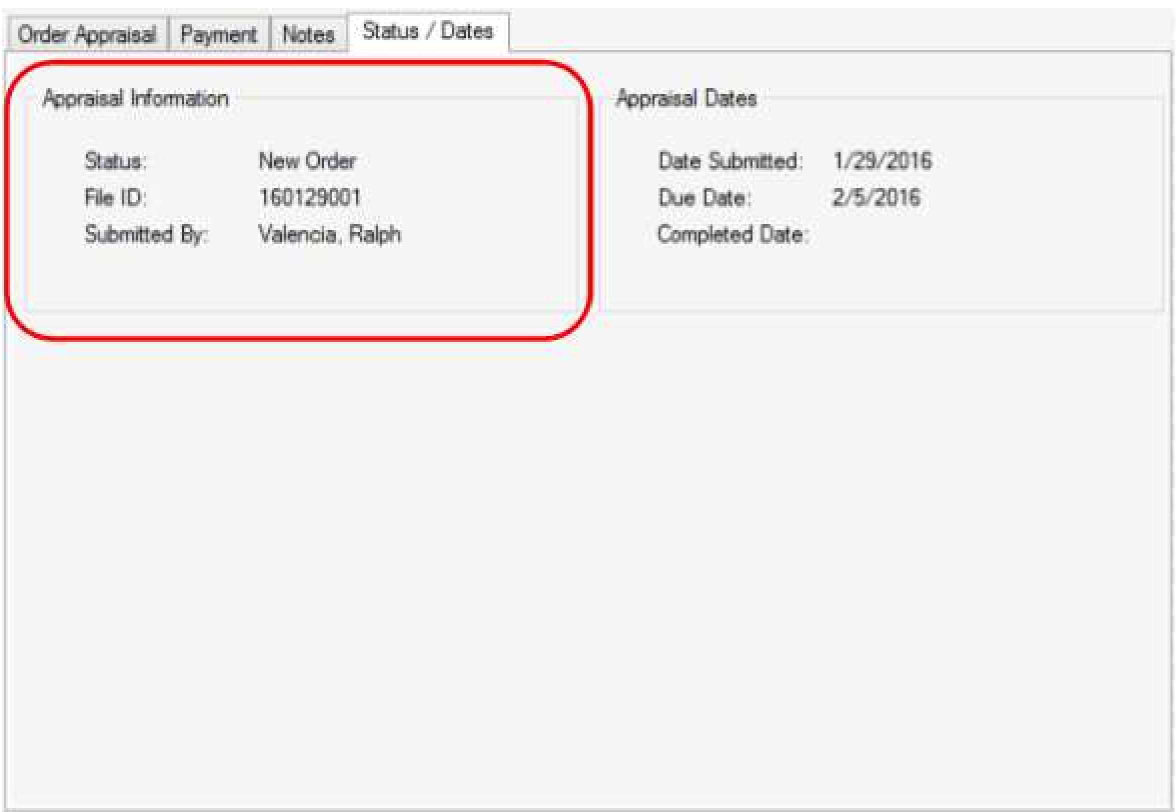
If the order submission is successful a confirmation popup is displayed [Image 1]; Otherwise an error message is displayed which will indicate the reason why the order failed [Image 2].

1. 

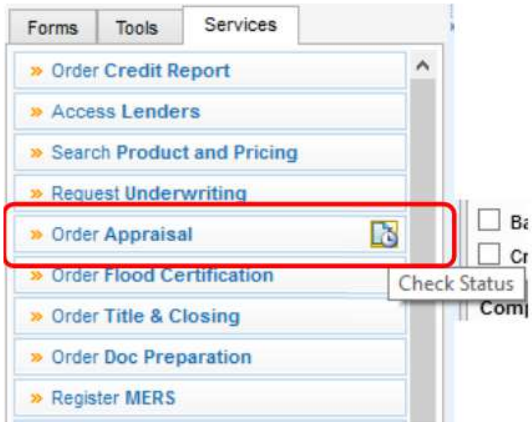
2. 

Check Order Status

The first approach to checking the status of an order is to click on the **Services > Order Appraisal** and opening the **Heartland Valuation** Software Appraisal Integration and selecting the **Status / Dates** tab. Encompass will show the latest status from your Preferred Service Provider and display it in the Appraisal Information section.



The second approach to checking the status of an order is to click on the paper icon in the Services Tab with a timer on it to check the status of the appraisal order for that loan.



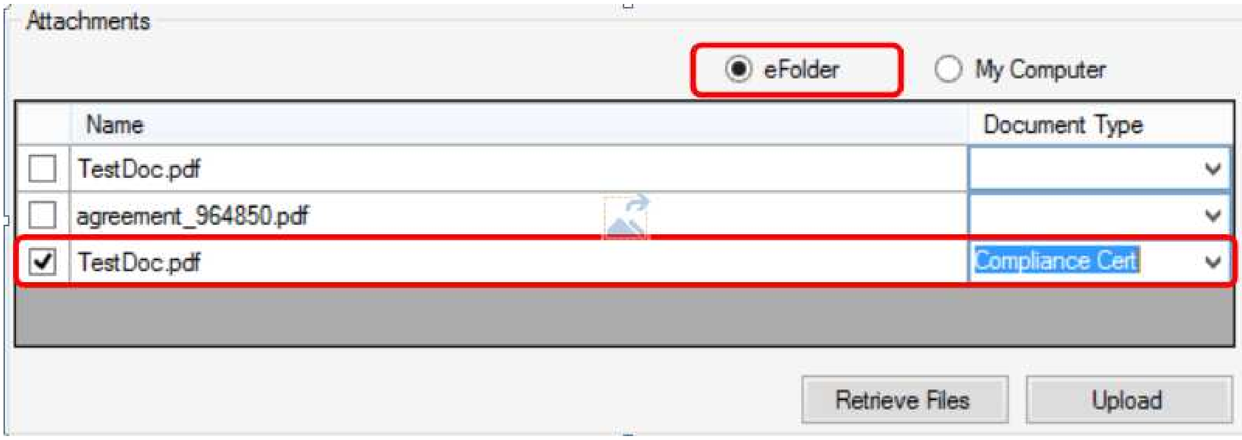
This will open the Encompass Appraisal Order Status windows listing the Appraisal orders that have been placed for that loan. Click on the Retrieve hyperlink to retrieve the status of the selected order or click on the View hyperlink to retrieve the attachments of the selected order if the order has already been completed. Encompass will automatically open the correct appraisal integration and retrieve the status of the order for you.

Note: A User can also use this section to retrieve files on a Completed Appraisal, in addition to the Retrieve button on page 11.

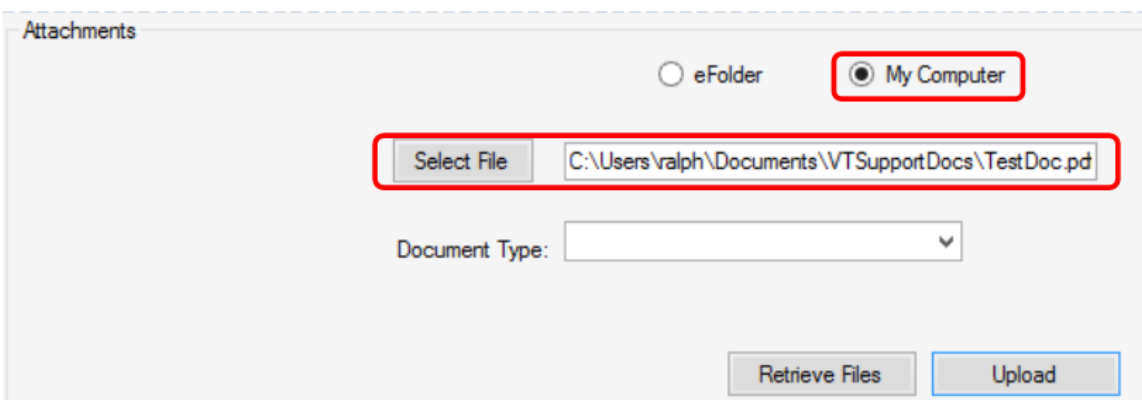
Upload Documents

Documents can be uploaded to your Preferred Service Provider as part of the initial order submission or as an update to an existing order.

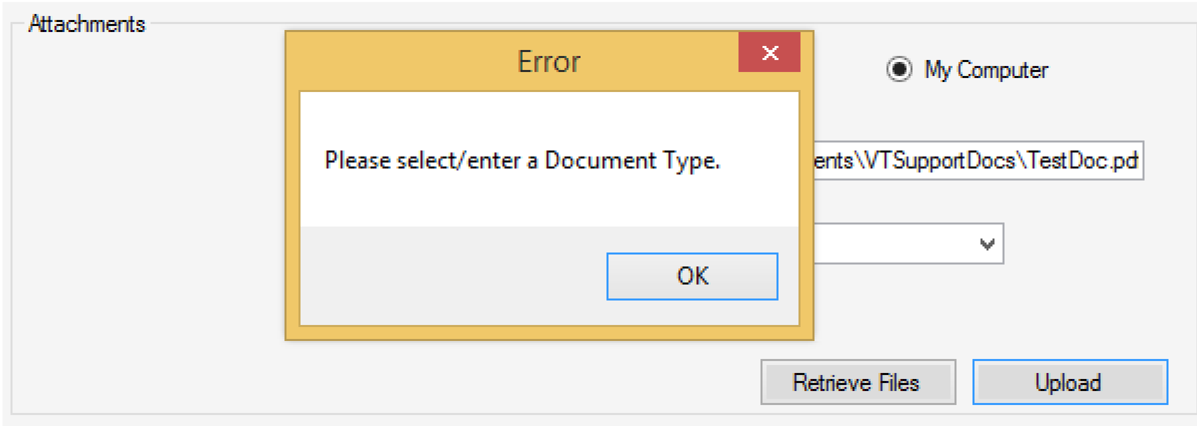
Whether it is for a new order, or an existing order; under the Order Appraisal > Attachments section, the user can select the location of the file from the eFolder or from My Computer. If the eFolder option is selected, the user can select each document with a check mark and assign a Document Type to the file.



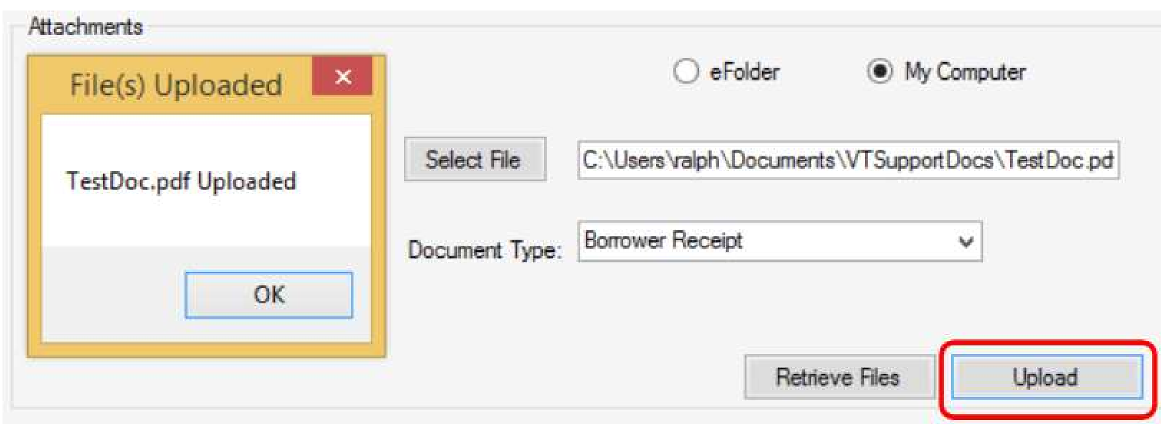
If the user selects My Computer, they will need to click the Select File button, and navigate to the appropriate folder location, click on the document they want to upload and click the Open button. This will add a path to the file's location.



The user will also need to select a Document Type from the drop down list, otherwise the user will see an error popup message requesting the user to select/enter a Document Type.

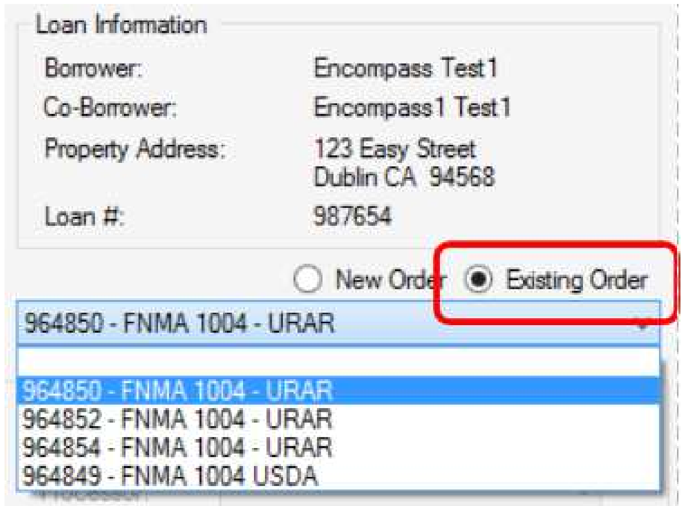


Once the Document Type has been selected and the Upload button clicked, the user will see a popup indicating the upload was successful.



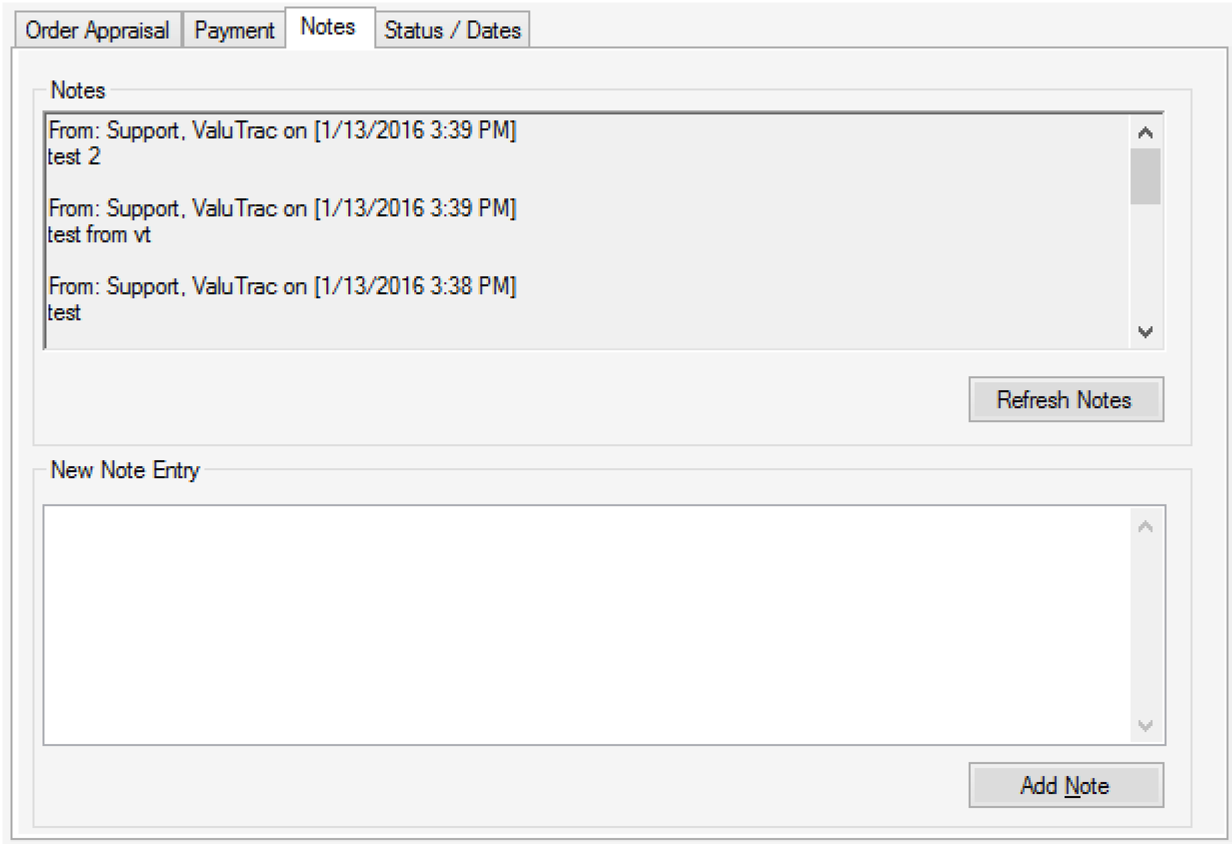
Click OK to close the window and return to the Order Appraisal tab.

If a document is being uploaded for an existing order, select the existing order in the Order UI first and then follow the steps above to attach the documents to that order.



Client Communication

Clients can send notes or request status on an order by clicking on the **Notes** tab of the Order UI for a selected order.

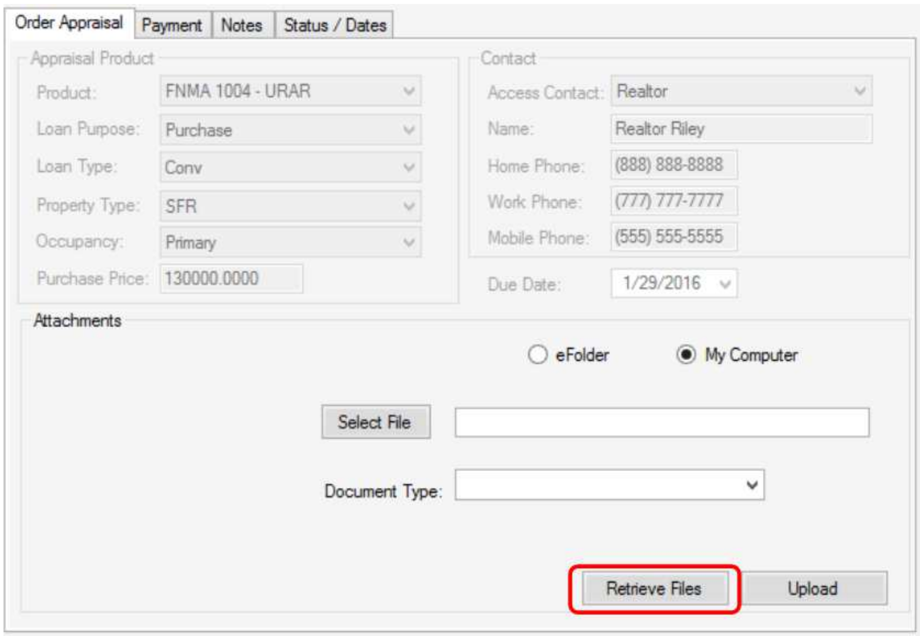


To Add a new note, the user can type into the “New Note Entry” section and click on the **Add Note** button. If your Preferred Service Provider responds immediately, the user can click on the **Refresh Notes** to retrieve any new notes being sent back.

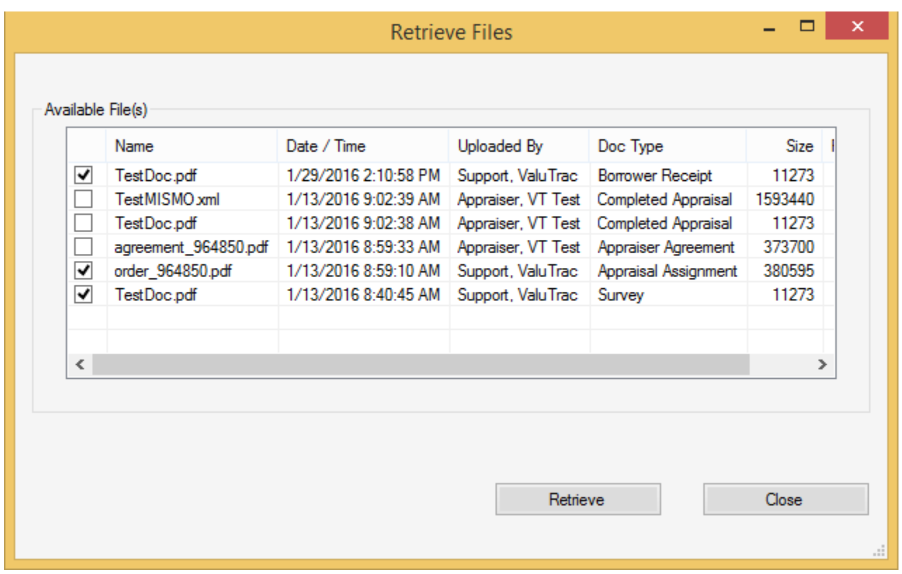
Retrieve completed order details and documents

When an order has been set to a status of Complete, the user will receive an email notification.

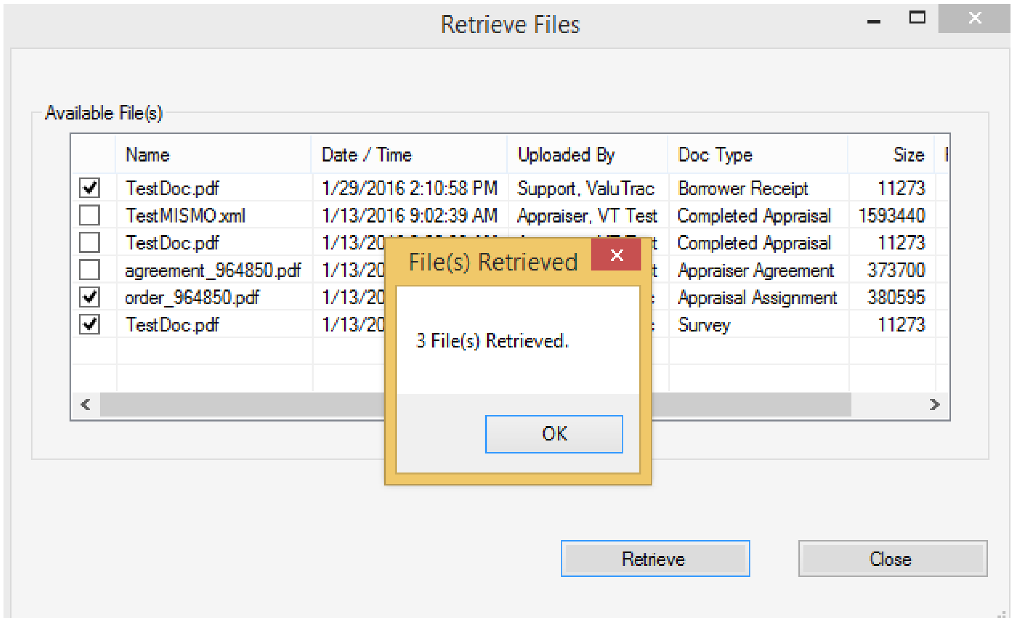
The user can then use the Appraisal Order User Interface to retrieve the associated documents. On the Order Appraisal > Attachments section, the user can click on the Retrieve Files button to import the associated appraisal documents.



Once the user clicks the Retrieve Files button, they will see a popup window with all available documents. The user can select which documents to retrieve by checking the appropriate box.



Once the user clicks on the Retrieve button, a popup window will indicate how many files were successfully retrieved.



The Appraisal report is stored automatically in the eFolder and you can revisit the appraisal report by either clicking on the eFolder icon 

in the Encompass main window or by clicking on the View Documents in eFolder button in the integration UI which will open the report in the eFolder window.

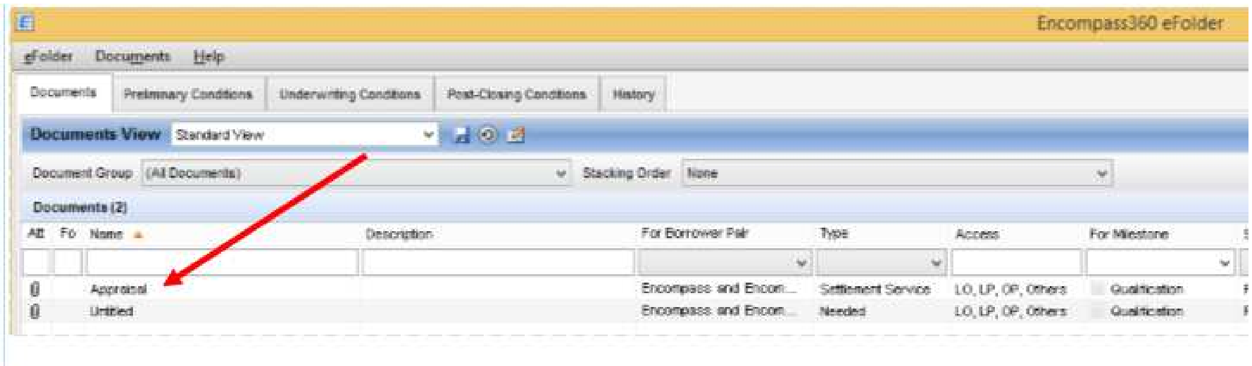
***The Appraisal XML is automatically saved in the Encompass Loan folder.**

Revisions

If a revision was requested and new appraisal documents or updates to an existing appraisal are available for an existing order, the user should be able to select the order and repeat the above steps to obtain the updated appraisal documents.

Managing documents in eFolder

Encompass eFolder provides a central location for accessing and managing the electronic files and documents associated with a loan. Appraisal reports can be reviewed by accessing eFolder directly from the eFolder icon in the upper right corner of your Encompass screen. The electronic version of the document and the date and time when it was received is stored in the eFolder.



Double clicking the Appraisal will open the Document in the Encompass eViewer.