
AMCTrak Appraisal Request System User Guide for Mortgage Brokers



**AMCTrak
Pleasant Hill, CA**

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AMCTrak Appraisal Request System User Guide for Mortgage Brokers

Overview

The AMCTrak Appraisal Request System is a web-based communication tool that allows Mortgage Brokers and Lenders to comply with the Federal Housing Finance Agency's Home Valuation Code of Conduct (HVCC) and the Real Estate Settlement Procedures Act (RESPA). HVCC prohibits Mortgage Brokers and Lenders from directly contacting real estate appraisers for loans that will be sold to Freddie Mac and FNMA. Using AMCTrak, Mortgage Brokers request real estate appraisals from a Lender, who orders the appraisal from an appraisal management company (AMC). RESPA prohibits total closing fees from exceeding the Good Faith Estimate by more than 10 percent unless there is justification. But some properties have unique characteristics that could warrant an increased appraisal fee and thus influence total closing costs. AMCTrak helps users manage those situations as well as routine appraisals. The AMCTrak solution ensures both regulatory compliance and the independence of appraisers.

This guide follows the steps in the AMCTrak appraisal request process, which begins with the borrower's loan application to the Broker, through the completion of the Lender's appraisal request to the AMC.

Summary of Appraisal Request Process

The following is a brief summary of the steps required in the appraisal request process.

- Through AMCTrak, the Mortgage Broker requests an appraisal report from the Lender.
- AMCTrak provides an automated or manual estimate of the appraisal fee.
- The Broker reviews the fee estimate and approves or rejects it.
- The Lender reviews the appraisal request and approves or rejects the request.
- If approved, the Lender selects an AMC using lender business requirements and forwards the appraisal request to the AMC.
- The AMC accepts or rejects the appraisal request. If the appraisal request is accepted by the AMC, a confirmation receipt is sent to the lender.
- After the appraisal request has been completed, the appraisal fee is charged to the requesting party.
- The AMC notifies the appropriate parties by email.

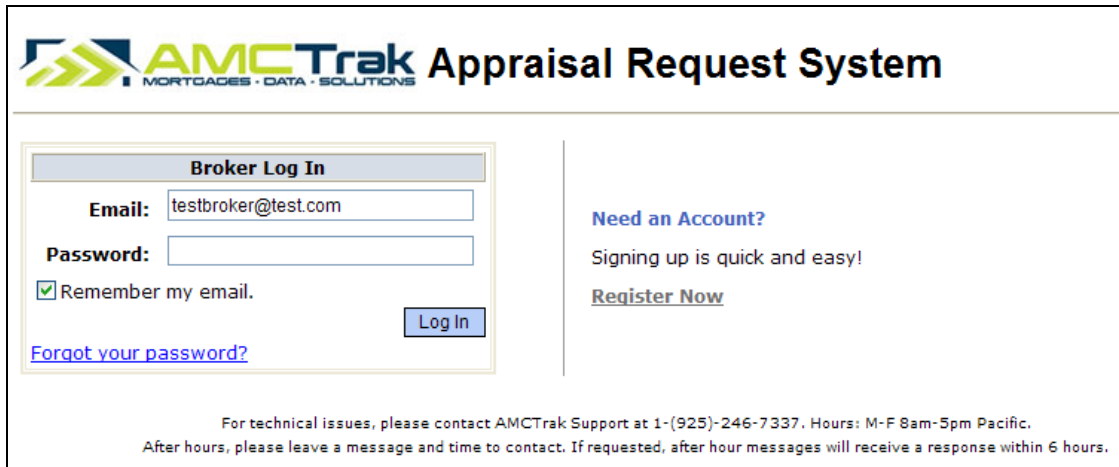
Logging In

To Log into the AMCTrak System:

- 1) After you have received the borrower's loan application, log onto the web site through the AMCTrak system:

[https://\[your company\].amctrak.com/Login.aspx?rid=2](https://[your company].amctrak.com/Login.aspx?rid=2)

- 2) Type your email address and password in the fields provided on the AMCTrak system account login screen, illustrated below.



AMCTrak Appraisal Request System

Broker Log In

Email: testbroker@test.com

Password:

Remember my email.

Log In

[Forgot your password?](#)

Need an Account?
Signing up is quick and easy!
[Register Now](#)

For technical issues, please contact AMCTrak Support at 1-(925)-246-7337. Hours: M-F 8am-5pm Pacific.
After hours, please leave a message and time to contact. If requested, after hour messages will receive a response within 6 hours.

AMCTrak Broker Log In screen

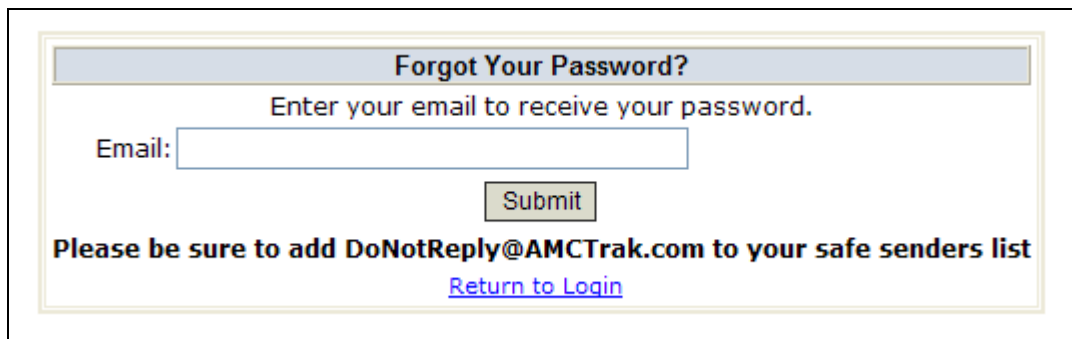
For Registered Users

- 1) Enter your information as follows:
- Email – Enter your business email address.
 - Password – Enter your secure password.
 - If you want the system to remember your email address, click the “Remember my email” box.
 - Click the **Log In** button.

This takes you to the New Messages screen, illustrated below.

Forgotten Password

- 2) If you have forgotten your password, click on the [Forgot your password?](#) link. The Forgot Your Password? screen appears, as illustrated below.



Forgot Your Password?

Enter your email to receive your password.

Email:

Submit

Please be sure to add DoNotReply@AMCTrak.com to your safe senders list

[Return to Login](#)

Forgot your Password? screen

- Enter your email address.
 - Click the **Submit** button.
 - Or you may click [Return to Login](#) to go back to the Login screen without saving your entry.
- 3) A message with your password will be sent to your secure email address shortly. If you need assistance, contact the Customer Support at support@propsci.com or 1-(925)-246-7337 for technical issues.

New Account Registration

If You Have Not Yet Set Up an Account:

- 1) Click on the [Register Now](#) link.
 - The Broker Registration screen appears, as illustrated below.



Registration [Return to Login](#)

First Name:

Last Name:

Company Name:

Phone: () - - ext:

Email:

Confirm Email:

Password:

Confirm Password:

Register screen for Brokers

- 2) Enter the following information:
 - First Name** – The first name of the user.
 - Last Name** – The last name of the user.
 - Company Name** – The name of your company.

Phone – The phone number of the user, including the extension if appropriate.

Email – The business email address of the user.

Confirm Email – Enter the email address of the user again to confirm accuracy.

Password – The password for the new user.

Confirm Password – For confirmation, retype your new password here exactly as in the previous field.

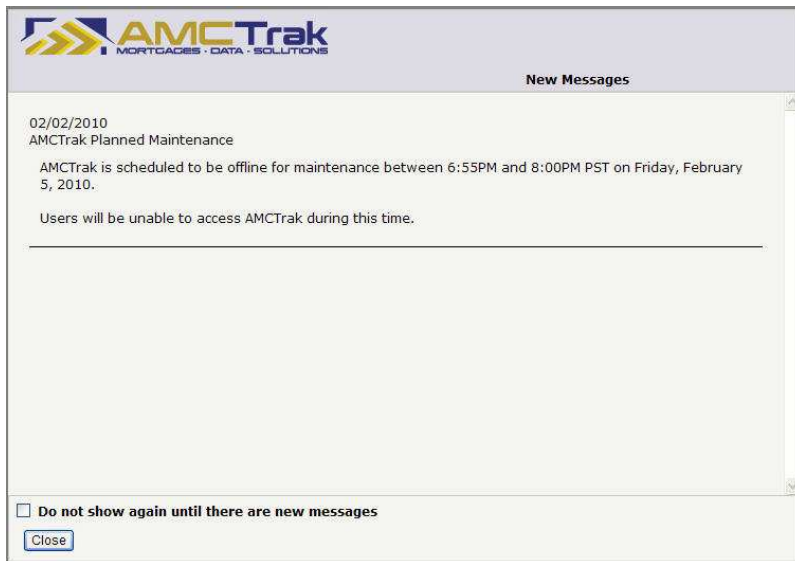
- Click **Register** to enter your information in the system.

Or, you may click [Return to Login](#) to go back to the login screen without saving your entries.

- When you click **Register**, the screen displays the message “*Registration Successful*” confirming your registration.

New Messages

Once you have successfully logged in, the New Messages screen appears, as illustrated below.



AMCTrak screen with new system messages

The New Messages screen is a scrollable page listing the past 30 days’ system messages such as announcements of planned maintenance and system unavailability and new AMCTrak features. The most recent messages are at the top of the screen.

If you would prefer not to have this screen displayed unless there are new messages, check the “Do not show again until there are new messages” checkbox. (You can still access the screen using a Main Menu option.) If you do not check the checkbox, the New Messages screen will appear each time you log in.

Order Activity Page

Once you have successfully logged in and passed the New Messages screen, the Order Activity page, illustrated below, is displayed. Your name appears at the top left of the screen beneath the links.




Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Pending Fee Approval	01/10/10
Test	600123456765	123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10
John Borrower	0103-1	1212 Test ST	Maui	HI	Incomplete	
John Borrower	0103-2	1212 Test ST	Kihei	HI	Pending Fee Designation	
TestCase102	100200300	302 Test St	San Jose	CA	Incomplete	
Test Broker	99999999	254 Test	Salt Lake City	UT	Incomplete	
John Borrower	0101-2	10756 Oak Shadow AVE	Las Vegas	NV	Incomplete	
John Borrower	0110-4	10556 Oak Shadow Ave	LAS VEGAS	NV	Incomplete	

Order Activity page

The Order Activity screen lists all active appraisal orders assigned to you. Access this screen at any time by clicking the [My Orders](#) link at the top of the page.

You may also search for previously submitted orders from this page. For details on search filters, see the [Searching for an Existing Submitted Appraisal Request](#) section below.

Main Menu Links



Main Menu (top of Order Activity screen)

The Main Menu, appearing at the top of this page and other first-level pages, displays the following links:

My Orders – Takes you to the Order Activity page.

My Estimates – Takes you to a screen that lists all appraisal fee estimates assigned to you.

New Request – A dropdown list that takes you to pages where you can create a new appraisal request.

My Profile – A link to your Profile page to view or edit your personal data, change your password, or give additional users access to your orders.

Quick Value – A research tool that utilizes third-party data and displays the data, including values for the subject property and recent comparable sales. A map that provides addresses and selling prices for the subject property and comps is also displayed.

What's New – A scrollable page listing the past 30 days' messages, such as announcements of planned maintenance and system unavailability and new AMCTrak features. The most recent messages are at the top of the screen.

Log Out – A link for logging completely out of the system and returning to the login screen.

For details on using these links, see the Main Menu Option sections below.

Order Activity Fields

The following information is displayed on the Order Activity page:

Borrower – The name of the borrower.

Loan # – The number of the loan.

Address – The address of the subject property.

City – The city of the subject property.

State – The state of the subject property.

Status – The status of the appraisal request.

Due – The due date for the appraisal report.

Status Update Process

During the appraisal request process, the AMC sends you and other designated recipients periodic status updates via AMCTrak Order Communications, based on the defined lender business requirements.

Below is the typical life cycle of the Appraisal Order:

- Order Requested
- Pending Fee Designation
- Pending Fee Approval
- In Process
- Awaiting Inspection
- Awaiting Inspection Date
- Completed

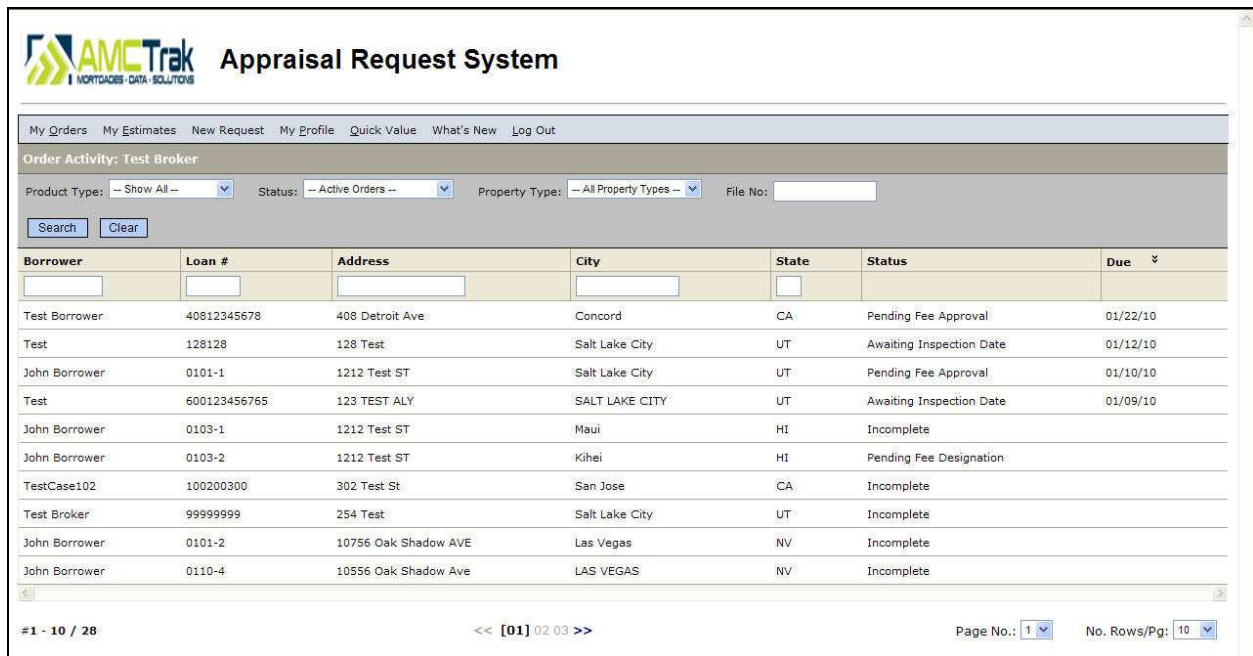
Other Statuses:

- On Hold
- Pending Cancellation
- Cancelled

Main Menu Option: My Orders

Order Activity Page

Click on the [My Order](#) link to display the Order Activity page illustrated below.



AMC Trak Appraisal Request System

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Order Activity: Test Broker

Product Type: -- Show All -- Status: -- Active Orders -- Property Type: -- All Property Types -- File No:

Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Pending Fee Approval	01/10/10
Test	600123456765	123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10
John Borrower	0103-1	1212 Test ST	Maui	HI	Incomplete	
John Borrower	0103-2	1212 Test ST	Kihei	HI	Pending Fee Designation	
TestCase102	100200300	302 Test St	San Jose	CA	Incomplete	
Test Broker	99999999	254 Test	Salt Lake City	UT	Incomplete	
John Borrower	0101-2	10756 Oak Shadow AVE	Las Vegas	NV	Incomplete	
John Borrower	0110-4	10556 Oak Shadow Ave	LAS VEGAS	NV	Incomplete	

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Order Activity page

This screen displays all of your active orders. See [Order Activity Fields](#) above for a description of the fields.

From this screen, you can filter your search for specific documents. For details, see the [Searching for an Existing Submitted Appraisal Request](#) section below.

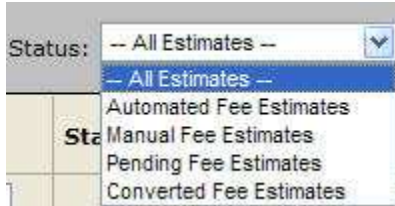
Clicking anywhere in a specific row takes you to the Summary screen to view details for an individual appraisal request. For details, see the [Viewing Individual Requests](#) section below.

You May Also Do the Following:

- Filter your search for active orders by making selections from the dropdown lists for Product Type, Status, Property Type and File number.
 - After completing all of your entries and selections, click the **Search** button
- OR
- Click **Clear** to discard your entries and selections and enter new search criteria.

Main Menu Option: My Estimates

Click on the [My Estimates](#) link and select one of the following from the dropdown:



Status dropdown list for My Estimates

All Estimates – The default for this dropdown list

AFE – Automated fee estimates (for non-unique properties)

MFE – Manual fee estimates (for unique properties)

PFE – Pending manual fee estimates under review. When completed, these become MFEs.

CFE – Converted fee estimates. These are appraisal fee estimates that have been converted to appraisal order requests.

Appraisal Fee Estimate Management Page

Depending on your selection, an Appraisal Fee Estimate grid view (which allows you to see and manage your estimates) displays, as shown below. This screen example displays all active CFE's.

Estimate ID	Loan #	Status	Address	City	State	Product	Fee Estimate	Date of Estimate	Expiration Date	Order Fee	Order Date	Borrower
1	0101-1	CFE	1212 Test ST	Pleasant Hill	CA	1004	\$425	12/22/09	01/21/10	\$1,200	01/01/10	John Borrov
1	0103-1	CFE	1212 Test ST	Pleasant Hill	CA	1004	\$425	12/22/09	01/21/10		01/03/10	John Borrov
1	0103-2	CFE	1212 Test ST	Pleasant Hill	CA	1004	\$425	12/22/09	01/21/10		01/03/10	John Borrov
7	494984984	CFE	395 Taylor	Pleasant Hill	CA	1004	\$425	12/24/09	01/23/10		01/22/10	Joe Test
9	1231-4	CFE	101 Price Ln	Pleasant Hill	CA	1004	\$425	12/24/09	01/23/10		12/31/09	John Borrov
10	1227	CFE	10756 Oak Shadow AVE	Las Vegas	NV	1004	\$425	12/24/09	01/23/10		12/27/09	John Borrov
11	1227	CFE	10756 Oak Shadow AVE	Las Vegas	NV	1004	\$425	12/24/09	01/23/10		12/27/09	John Borrov
12	1227-2	CFE	10756 Oak Shadow AVE	Las Vegas	NV	1004	\$425	12/25/09	01/24/10		12/27/09	John Borrov
13	1227-3	CFE	10756 Oak Shadow AVE	Las Vegas	NV	1004	\$425	12/25/09	01/24/10		12/27/09	John Borrov
14	0101-2	CFE	10756 Oak Shadow AVE	Las Vegas	NV	1004	\$425	12/25/09	01/24/10		01/01/10	John Borrov

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Appraisal Fee Estimates page with CFE filter selected

Your name appears at the top left of the screen. From this screen, you can search for specific types of estimates, or select an individual row from which you may drill down.

To Search by Estimate Type:

To filter the search for a specific estimate, click the Status dropdown and select from the list.

Then click **Search**. All active estimates for the estimate type you selected will display the following information. If no filter was selected, all types of active estimates will appear.

Estimate ID – The identification number of the estimate.

Loan # – The number of the borrower’s loan.

Status – The status of the estimate.

Address – The address of the property to be appraised.

City – The city of the property to be appraised.

State – The state of the property to be appraised.

Product – The type of appraisal report requested.

Fee Estimate – The estimated amount of the appraisal fee.

Date of Estimate – The date on which the fee amount was estimated. You may click the double chevrons to re-order estimates by date (oldest or most recent).

Expiration Date – The date on which the fee estimate expires.

Order Fee – The dollar amount of the appraisal fee.

Order Date – The date of the appraisal order request.

Borrower – The name of the borrower.

To Navigate through Your Search Results:

- 1) Click the **Page No.** dropdown. If you have more than one page of results, click the number of the desired page.
 - Or you may click a grayed-out number at the bottom of the page to go to another page of results, or click the double chevron to go forward or back by one page.

<< [01] 02 >>

- 2) Click the **No. Rows/Pg.** dropdown to determine how many rows to be displayed per page. The default is 10 rows per page.
 - To auto-refresh your screen, select from the 1 min., 5 min., or 10 min. radio buttons at the top right of the screen. Or select the OFF radio button if you do not wish your screen to auto-refresh.
 - To clear your search data, click **Clear**.

Viewing Individual Estimates

When you have a results grid from a search described in the previous section, click on a row in the grid to “drill down” and view details for an individual request.

One of the following results pages will appear:

AFE – Fee estimate completed information page. This status applies when an automated fee estimate has been completed.

MFE – Manual fee estimate completed information page. This status applies when the manual fee estimate has been completed.

CFE – This status applies when the fee estimate has been completed and converted into an appraisal order.

Automated Appraisal Fee Estimate Page

- To create an automated appraisal fee estimate, click on the [New Request](#) link at the top of the Order Activity screen and select New Fee Estimate from the dropdown. The Automated Appraisal Fee Estimate page displays as illustrated below.

[My Orders](#) | [My Estimates](#) | [New Request](#) | [My Profile](#) | [Quick Value](#) | [What's New](#) | [Log Out](#)

Appraisal Fee Estimate

Product

Property Type:

Report Type:

Address Info

Address:

City, State:

Zip Code:

Property Characteristics

Estimate of Value:

Need Help? Use our free Quick Value tool: [Click Here](#)

Disclaimer

The estimated appraisal fee you are about to receive is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

Unique property characteristics may have a significant impact on the actual final fee estimate once the appraisal request has been submitted to the lender. If your property has unique characteristics, such as those listed below, the fee estimate may be under estimated.

- Gross Living Area above average for the area
- Lot Size above average for the area
- Lot Size greater than 1 acre
- Guest Cottages, Outbuildings or other Structures
- Water frontage, orientation or views
- Significant External Influences
- Unique Architectural Style
- Construction in Progress
- Deferred Maintenance

If your property has any of these unique characteristics that you believe may impact the appraisal fee, you may complete an online form answering questions about your property and its unique characteristics. Once you submit the form it may take up to 8 hours to receive this quote.

My Property is Unique - [I would like to Complete a Questionnaire and Obtain a Manual Quote](#)
(Once submitted, a manual quote will be returned within one business day)

I agree to accept the following terms when using this appraisal fee estimate system:

The Real Estate Settlement Procedures Act requires you to provide a Good Faith Estimate of fees and costs to your borrower. This online appraisal fee estimate system is provided to assist you with this regulation. However, real estate is a unique commodity and the cost to complete an appraisal is subject to many factors, including complexity of the property in any given market. This appraisal fee estimate is provided on a best efforts basis. At the time the appraisal order is placed with the lender and assigned to the appraiser or appraisal management company, the actual final fee will be quoted. In the event the fee is different than the estimated fee provided by this online system, you accept full and complete responsibility for any costs incurred due to failure to provide an accurate good faith appraisal fee.

My Property is Not Unique - Please Provide Automated Fee Estimate Now

Completed request for automated fee estimate

- Complete this page as follows:

Product Section

Property Type – Select the property type from the dropdown.

Report Type – Select the report type from the dropdown.

Address Info Section

Address – Enter the address of the property to be appraised.

City, State – This will be automatically populated based on ZIP Code entry.

ZIP Code – Entered the ZIP Code of the property to be appraised.

Property Characteristics Section

Estimate of Value – Enter the estimated value of the property to be appraised.

Disclaimer – Information regarding unique property characteristics that may affect the final fee estimate and a summary of the Real Estate Settlement Procedures Act and Good Faith Estimate (GFE).

Notes:

If you need help estimating the value of the property, use the Quick Value tool: [Click here](#) to view the Quick Value section for details.

Unique property characteristics may significantly affect the final fee estimates. For a unique property, click the [I would like to Complete a Questionnaire and Obtain a Manual Quote](#) link to obtain a manual quote. See the section below on Manual Fee Estimates for details.

- Check the “My Property is Not Unique” checkbox to activate the “Request Fee Estimate” button.
- Click the **Request Fee Estimate** button. The Automated Appraisal Fee Estimate Result page displays, as shown below.


Note: The Real Estate Settlement Procedures Act (RESPA) prohibits increasing fees over the estimate by more than 10% except if the appraisal reveals changed circumstances related to the subject property.

Automated Appraisal Fee Estimate Result

[My Orders](#) [My Estimates](#) [New Request](#) [My Profile](#) [Quick Value](#) [What's New](#) [Log Out](#)

Appraisal Fee Estimate

The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

 [Print Appraisal Fee Estimate Certificate](#)

AFE ID: 1097

Appraisal Fee Estimate: \$425.00

Property Type: Single Family Residence

Report Type: 1004

Address: 1530 Nuala Street
CONCORD, CA 94518

Date of Estimate: 2/9/2010

AFE Expiration Date: 3/11/2010

Disclaimer

Unique property characteristics may have a significant impact on the actual final fee estimate once the appraisal request has been submitted to the lender. If your property has unique characteristics, such as those listed below, the fee estimate may be under estimated.

- Gross Living Area above average for the area
- Lot Size above average for the area
- Lot Size greater than 1 acre
- Guest Cottages, Outbuildings or other Structures
- Water frontage, orientation or views
- Significant External Influences
- Unique Architectural Style
- Construction in Progress
- Deferred Maintenance

The Real Estate Settlement Procedures Act requires you to provide a Good Faith Estimate of fees and costs to your borrower. This online appraisal fee estimate system is provided to assist you with this regulation. However, real estate is a unique commodity and the cost to complete an appraisal is subject to many factors, including complexity of the property in any given market. This appraisal fee estimate is provided on a best efforts basis. At the time the appraisal order is placed with the lender and assigned to the appraiser or appraisal management company, the actual final fee will be quoted. In the event the fee is different than the estimated fee provided by this online system, you accept full and complete responsibility for any costs incurred due to failure to provide an accurate good faith appraisal fee.

Automated Appraisal Fee Estimate Result page

The Automated Appraisal Fee Estimate Result is applicable to non-unique property and displays the following information:

AFE ID – The ID number of the automated appraisal fee estimate.

Appraisal Fee Estimate – The estimate for the appraisal fee.

Property Type – The type of property being appraised.

Report Type – The number indicating the report type (product).

Address – The address of the property to be appraised.

Date of Estimate – The date the appraisal estimate was created.


AFE Expiration Date – The date the appraisal estimate expires.

Disclaimer – Information regarding unique property characteristics that may affect the final fee estimate and a summary of the Real Estate Settlement Procedures Act and Good Faith Estimate (GFE).

- To print the Appraisal Fee Estimate Certificate, click on the **printer** icon at the top left of the screen. This Certificate prints with the AMCTrak logo.
- To complete the appraisal request, click the **Continue to Create Appraisal Request** button to proceed to the Order Information page.

Manual Appraisal Fee Estimate Page

- To create a Manual Appraisal Fee Estimate, click on the New Request link at the top of the Order Activity screen and select New Fee Estimate from the dropdown. On the Appraisal Fee Estimate page click on I would like to Complete a Questionnaire and Obtain a Manual Quote.


AMCTrak Appraisal Request System
MORTGAGES - DATA - SOLUTIONS

[My Orders](#) | [My Estimates](#) | [New Request](#) | [My Profile](#) | [Quick Value](#) | [What's New](#) | [Log Out](#)

Appraisal Fee Estimate

Product	
Property Type:	<input type="text" value="SFR"/>
Report Type:	<input type="text" value="1004"/>

Address Info	
Address:	<input type="text" value="1998 Marvin Way"/>
City, State:	CONCORD, CA
Zip Code:	<input type="text" value="94518"/>

Property Characteristics	
Estimate of Value:	<input type="text" value="\$400,000"/>
Need Help? Use our free Quick Value tool: Click Here	

Unique Characteristics	
Gross Living Area:	<input type="text"/> square feet
Lot Size:	<input type="text"/> square feet
Guest Cottages, Outbuildings or Other Structures:	
<input type="text"/>	
Water frontage, orientation or views:	
<input type="text"/>	
Special External Influences:	
<input type="text"/>	
Unique Architectural Style or Special Features:	
<input type="text"/>	
Construction in Progress:	
<input type="text"/>	
Deferred Maintenance:	
<input type="text"/>	
Any other information Deemed Relevant to Complexity:	
<input type="text"/>	

Disclaimer

The estimated appraisal fee you are about to receive is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

I agree to accept the following terms when using this appraisal fee estimate system:

The Real Estate Settlement Procedures Act requires you to provide a Good Faith Estimate of fees and costs to your borrower. This online appraisal fee estimate system is provided to assist you with this regulation. However, real estate is a unique commodity and the cost to complete an appraisal is subject to many factors, including complexity of the property in any given market. This appraisal fee estimate is provided on a best efforts basis. At the time the appraisal order is placed with the lender and assigned to the appraiser or appraisal management company, the actual final fee will be quoted. In the event the fee is different than the estimated fee provided by this online system, you accept full and complete responsibility for any costs incurred due to failure to provide an accurate good faith appraisal fee.

Once submitted, a manual quote will be returned within one business day.

Questionnaire for Manual Appraisal Fee Estimate

- The fields for Property Type, Report Type, Address and Estimate of Value are pre-filled from previous input. Complete the remaining fields on this page as follows:

Product Section

Property Type – The property type from the dropdown.

Report Type – The report type from the dropdown.

Address Info Section

Address – The address of the property to be appraised.

City, State – This is automatically populated based on ZIP Code entry.

ZIP Code – The ZIP Code of the property to be appraised.

Property Characteristics Section

Estimate of Value – The estimated value of the property to be appraised.

Note: The estimate of value is a reference only. If you wish to adjust the estimate, use the Quick Value tool. [Click here](#) to view the Quick Value section for details.

Unique Characteristics Section

- Fill in only the sections that pertain to your unique property.
 - Gross Living Area** – Enter the amount of square feet of the structure to be appraised.
 - Lot Size** – Enter the amount of square feet of the lot to be appraised.
 - Guest Cottages, Outbuildings or Other Structures** – In the scrollable field, enter any applicable information.
 - Water Frontage, Orientation or Views** – In the scrollable field, enter any applicable information.
 - Special External Influences** – In the scrollable field, enter any applicable information.
 - Unique Architectural Style or Special Features** – In the scrollable field, enter any applicable information.
 - Construction in Progress** – In the scrollable field, enter any applicable information.
 - Deferred Maintenance** – In the scrollable field, enter any applicable information.
 - Any Other information Deemed Relevant to Complexity** – In the scrollable field, enter any applicable information.
 - Disclaimer** – Information regarding unique property characteristics that may impact the final fee estimate and a summary of the Real Estate Settlement Procedures Act and Good Faith Estimate (GFE).
- Click the **Request Fee Estimate** button. The manual Appraisal Fee Estimate screen displays, showing "Pending Quote" in the Appraisal Fee Estimate field.

[My Orders](#)
 [My Estimates](#)
 [New Request](#)
 [My Profile](#)
 [Quick Value](#)
 [What's New](#)
 [Log Out](#)

Appraisal Fee Estimate

The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

 [Print Appraisal Fee Estimate Certificate](#)

AFE ID: 1098
Appraisal Fee Estimate: Pending Quote
Property Type: Single Family Residence
Report Type: 1004
Address: 1650 NUALA ST
 CONCORD, CA 94518

Gross Living Area: 3,500 square feet
Lot Size: 8,700 square feet

Guest Cottages, Outbuildings or Other Structures:
 1

Water frontage, orientation or views:
none specified

Special External Influences:
none specified

Unique Architectural Style or Special Features:
 Garrett

Construction in Progress:
none specified

Deferred Maintenance:
none specified

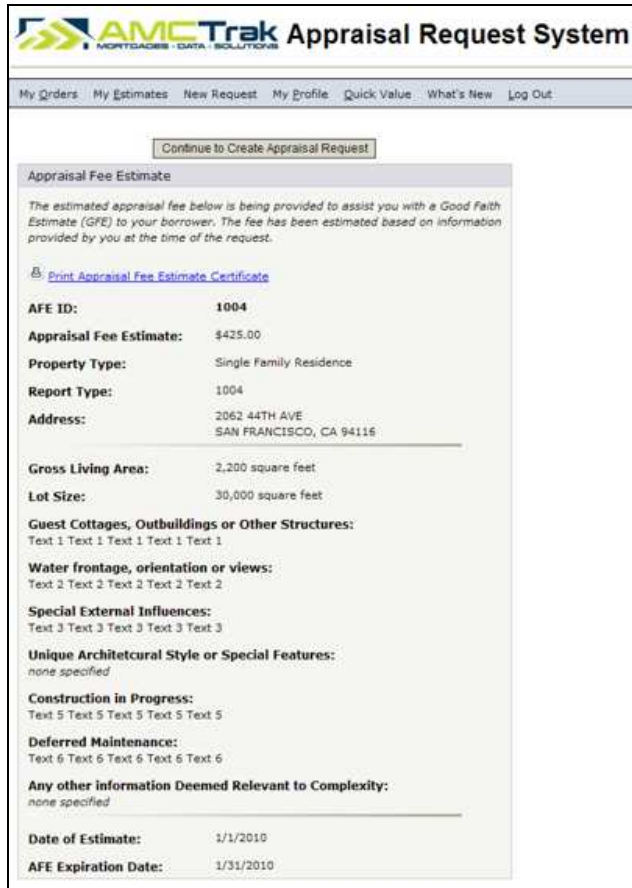
Any other information Deemed Relevant to Complexity:
none specified

Date of Request: 2/9/2010

Manual Fee Estimate result page with "Pending Quote"

The manual appraisal fee estimate results will be returned within one business day (24 hours), and the actual estimate will replace the words "Pending Quote."

Manual Appraisal Fee Estimate Result



AMCTrak Appraisal Request System

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

[Continue to Create Appraisal Request](#)

Appraisal Fee Estimate

The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

[Print Appraisal Fee Estimate Certificate](#)

AFE ID: 1004

Appraisal Fee Estimate: \$425.00

Property Type: Single Family Residence

Report Type: 1004

Address: 2062 44TH AVE
SAN FRANCISCO, CA 94116

Gross Living Area: 2,200 square feet

Lot Size: 30,000 square feet

Guest Cottages, Outbuildings or Other Structures:
Text 1 Text 1 Text 1 Text 1 Text 1

Water frontage, orientation or views:
Text 2 Text 2 Text 2 Text 2 Text 2

Special External Influences:
Text 3 Text 3 Text 3 Text 3 Text 3

Unique Architectural Style or Special Features:
none specified

Construction in Progress:
Text 5 Text 5 Text 5 Text 5 Text 5

Deferred Maintenance:
Text 6 Text 6 Text 6 Text 6 Text 6

Any other information Deemed Relevant to Complexity:
none specified

Date of Estimate: 1/1/2010

AFE Expiration Date: 1/31/2010

Manual Fee Estimate screen with dollar fee amount

After the Manual Appraisal Fee Estimate request has been reviewed, the Manual Appraisal Fee Estimate Result displays, with a dollar amount replacing "Pending Quote" in the Appraisal Fee Estimate field. Once the actual fee appears, the **Continue to Create Appraisal Request** button is activated to allow you to create the appraisal order.

The Manual Approval Fee Estimate Result displays the following fields:

AFE ID – The ID number of the manual appraisal fee estimate.

Appraisal Fee Estimate – The estimate for the appraisal fee, which replaces the prior wording "Pending Quote."

Property Type – The type of property being appraised.

Report Type – The number indicating the report type (product).

Address – The address of the property to be appraised.

Gross Living Area – The amount of square feet of the structure to be appraised.

Lot Size – The amount of square feet of the lot to be appraised.

Unique Characteristics fields – These will populate with the information entered earlier on the Questionnaire.

Date of Estimate – The date the appraisal estimate was created.

AFE Expiration Date – The date the appraisal estimate expires.

- To print the Appraisal Fee Estimate Certificate, click on the **printer** icon at the top left of the screen. This Certificate prints with the AMCTrak logo.
- Click the **Continue to Create Appraisal Request** button to complete the appraisal request and proceed to the Order Information page.



My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Continue to Create Appraisal Request

Appraisal Fee Estimate

The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

 [Print Appraisal Fee Estimate Certificate](#)

AFE ID:	1097
Appraisal Fee Estimate:	\$425.00
Property Type:	Single Family Residence
Report Type:	1004
Address:	1530 Nuala Street CONCORD, CA 94518

Top of estimate page with Continue button

Order Summary

If the Appraisal Request has a fee quoted by the Appraisal Management Company that exceeds the fee estimate originally provided, the following screen appears.

My Orders	My Estimates	New Request	My Profile	Quick Value	What's New	Log Out
Address: 1212 Test ST Salt Lake City, UT 94523		Loan #: 0101-1	Fee: \$600		Date Due: 01/10/10	
Status: Pending Fee Approval						
Summary	Details	Contacts	Documents	Communications	Admin	

Order Summary [Print](#)

Your Appraisal Request has a Fee Quoted by the Appraisal Management Company that exceeds the fee estimate originally provided.

This higher fee is due to circumstances that may require re-disclose as specified by RESPA.

The Fee Quote was higher than the original estimate for the following reason(s):

- The gross living area is larger than typical.
- The lot size is larger than typical.
- The location has minimal comparable sale data available.
- The subject design or architecture is unique for area.
- Other: This is along a swamp area.

The quoted fee for this Appraisal is \$600.00

Order Summary	
File #:	182294
Report:	1004
Address:	1212 Test ST Salt Lake City, UT 94523
Borrower:	John Borrower
Loan Number:	0101-1
<hr/>	
Request Initiated:	01/01/10
Date Ordered:	
Inspection Date:	no date set
Due Date:	01/10/10
Total Cost:	\$600.00

Appraisal Fee Estimate	
<small>The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.</small>	
Print Appraisal Fee Estimate Certificate	
AFE ID:	1
Appraisal Fee Estimate:	\$425.00
Date of Estimate:	12/22/2009
AFE Expiration Date:	1/21/2010

Order Summary with buttons for approval or rejection of fee

This screen displays the higher estimated fee quote and the reasons for it, as well as the original estimated fee quote and information regarding the property to be appraised.

- Select one of the following options:
 - Approve Fee** button – Clicking this button approves the new appraisal fee quote and instructs the Appraisal Management Company to begin work on the appraisal assignment.

Reject Fee button – Clicking this button rejects the appraisal fee quote and cancels out the order request.

- To print the Appraisal Fee Estimate Certificate, click on the **printer** icon at the top left of the screen. This Certificate prints with the AMCTrak logo.

Main Menu Option: New Request

To create a New Appraisal Request, select one of the following methods of navigation:

- 1) Click on the New Request link at the top of Order Activity screen and select New Appraisal Request from the dropdown. This takes you to the Appraisal Order Request screen with the Order Information page displayed, as illustrated below.



New Request dropdown

OR

- 2) Click on the My Estimates link at the top of the Order Activity screen and select either MFE or AFE, depending on your search. This takes you to the Pending Appraisal Request screen which lists all of the specific fee requests in your search.

Click on the row that lists the fees for the order you wish to create. This takes you to the Appraisal Order Request screen with the Order Information page displayed, as illustrated below.

Appraisal Order Request

The Appraisal Order Request consists of five tabs, which are illustrated and discussed in this section. These tabs do not become active until you have entered information in the fields on the screens.

Order Information Page

The Order Information page requests information about the product, property information, and loan information. Required fields are indicated by a red dot (•). If the user attempts to proceed without completing required fields, the textboxes turn red and the word "Required" (in red) is displayed next to the field.

My Orders | My Estimates | New Request | My Profile | Quick Value | What's New | Log Out

Appraisal Order Request

Order Details | Contact Info | Upload Docs | Payment Info | Go

Order Information

Please complete the following information regarding the product, property, and loan for this order.

Appraisal Fee Estimate

Select from Your Existing Appraisal Fee Estimates:

1097: 1530 Nuata Street, CONCORD CA - 1094 - \$425.00

OR

[Obtain a New Appraisal Fee Estimate](#)

Lender

Branch: Modesto, CA, 3501 Coffee Rd. #0

Account Representative: -SELECT-

Product

Property Type: SFR

Report Type: 1094

Property Info

Address: 1530 Nuata Street

City, State: CONCORD CA

Zip Code: 94518

County: Contra Costa

Property Use: Owner Occupied

Description:

Loan Info

Loan Number: 0111

Loan Purpose: Purchase Refinance

GFE Appraisal Fee: \$425 [What's This?](#)

Estimate of Value: \$375,500 [Is This MyCC Compliant?](#)

Borrower: Bradley Borrower

Borrower Email: Bradley@Borrower.net

Address: 4122 30th Avenue

City, State: Hayward CA

Zip Code: 94508

Additional Loan Info:

Mortgage Broker Info

First Name: Test

Last Name: Broker

Phone: (415) 323-2233

Email: testbroker@test.com
(Email notifications will be sent to this address.)

Order Information page

- Complete the remaining fields.

Appraisal Fee Estimate Section

- From the dropdown, from your existing appraisal fee estimates, select the appraisal fee estimate for which you want to create an appraisal order request.

OR

- Click on the "Obtain a New Appraisal Fee Estimate" link. This allows you to request a new fee estimate in place of the existing estimate.

Lender Section

- Select the Lender branch from the Branch dropdown.

Product Section

The fields in this section are auto-populated.

Property Info Section

- The following fields in the Property Info Section are auto-populated: Address, City, State, ZIP Code, and County. Enter the following information in the remaining fields. Required fields are indicated by a red dot (•) If the user attempts to proceed without completing required fields, the textboxes turn red and the word "Required" (in red) is displayed next to the field.

Property Use – From the dropdown, select the use of the property to be appraised (e.g., owner-occupied), as illustrated below.



Property Use: -- SELECT --
-- SELECT --
Owner Occupied
Tenant Occupied
Vacant

Property Use dropdown

Additional Description – Optional. Enter any additional appropriate descriptions of the property to be appraised. This is a scrollable field.

Loan Info Section

- The Estimate of Value field is auto-populated. Enter the following information in the remaining fields. Required fields are indicated by a red dot (•) If the user attempts to proceed without completing required fields, the textboxes turn red and the word "Required" (in red) is displayed next to the field.

Loan Number – The number of the loan.

Loan Purpose – Click on one of the following radio buttons:

- Purchase – Click on this button if the loan is for a purchase.
- Refinance – Click on this button if the loan is for a refinance.

GFE Appraisal Fee – Enter the GFE Appraisal Fee amount. Hovering your mouse over the [What's This?](#) link displays the tool tip "What number did you write in this field?"

Estimate of Value – This field is auto-populated. Hovering your mouse over the [Is This HVCC Compliant?](#) link displays the tool tip "This estimate of value is for your reference only, and is not communicated to the appraiser."

Borrower – The first and last name of the borrower.

Borrower Email – The email address of the borrower.

Address – The street number and street name where the borrower resides.

City, State – The city where the borrower resides. Use the State dropdown to select the state where the borrower resides.

ZIP Code – The ZIP code where the borrower resides.

Additional Loan Info – Optional. Enter any additional appropriate information regarding the loan.

Mortgage Broker Info Section

Required fields are indicated by a red dot (•) If the user attempts to proceed without completing required fields, the textboxes turn red and the word "Required" (in red) is displayed next to the field.

First Name – Enter your first name.

Last Name – Enter your last name.

Phone – Enter your phone number, including area code.

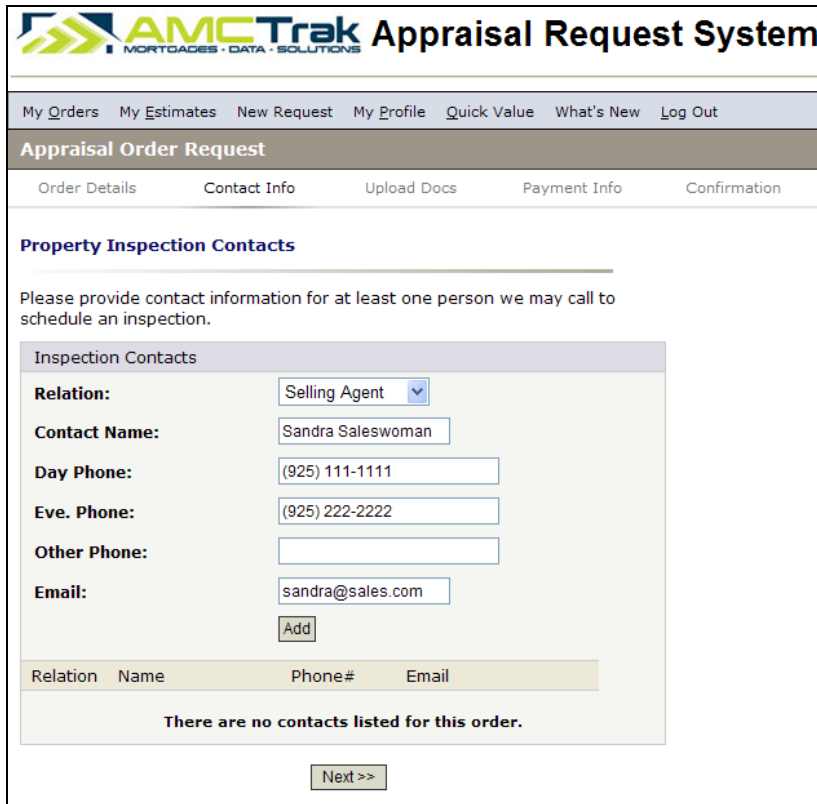
Email – Enter your business email address. By default, the email address you signed in with will be displayed in this field. You may type a different address if desired. Email notifications will be sent to the address appearing in this field.

- After completing your entries, click **Next** to go to the Property Inspection Contacts screen.

If any required fields have been omitted, you will not be able to leave the page, Required fields are indicated by a red dot (•) If the user attempts to proceed without completing required fields, the textboxes turn red and the word "Required" (in red) is displayed next to the field. If incorrect data has been put in a field, the required field will turn reddish pink and display an "Invalid" message to the right of the field.

Property Inspection Contacts Page

The Property Inspection Contacts page, illustrated below, requests information about the contact person for the appraisal inspection.



Property Inspection Contacts page (before clicking Add button)

- 1) In the fields described below, provide contact information for at least one person to call to schedule an inspection.

Relation – From the dropdown, select the relationship between you and the contact, e.g., selling agent, property owner.



Relation dropdown list

Contact Name – The first and last name of the contact person for the inspection.

Day Phone – The daytime phone number of the contact person, with area code first. Note that hovering your mouse over this field displays the format for the phone number.

Eve. Phone – Optional. The evening phone number of the contact person, with area code first. Note that hovering your mouse over this field displays the format for the phone number.

Other Phone – Optional. An additional phone number where the contact person may be reached, e.g., cell phone. Note that hovering your mouse over this field displays the format for the phone number.

Email – The email address of the contact person.

- 2) After completing your entries, click **Add**. Your new entry now appears at the bottom of the Property Inspection Contacts page, as illustrated below.

Inspection Contacts

Relation:

Contact Name:

Day Phone:

Eve. Phone:

Other Phone:

Email:

Relation	Name	Phone#	Email
Selling Agent	Sandra Saleswoman	(925) 111-1111 (925) 222-2222	sandra@saleswoman.com

Property Inspection Contacts page (after clicking Add button)

To Add Another Contact Person:

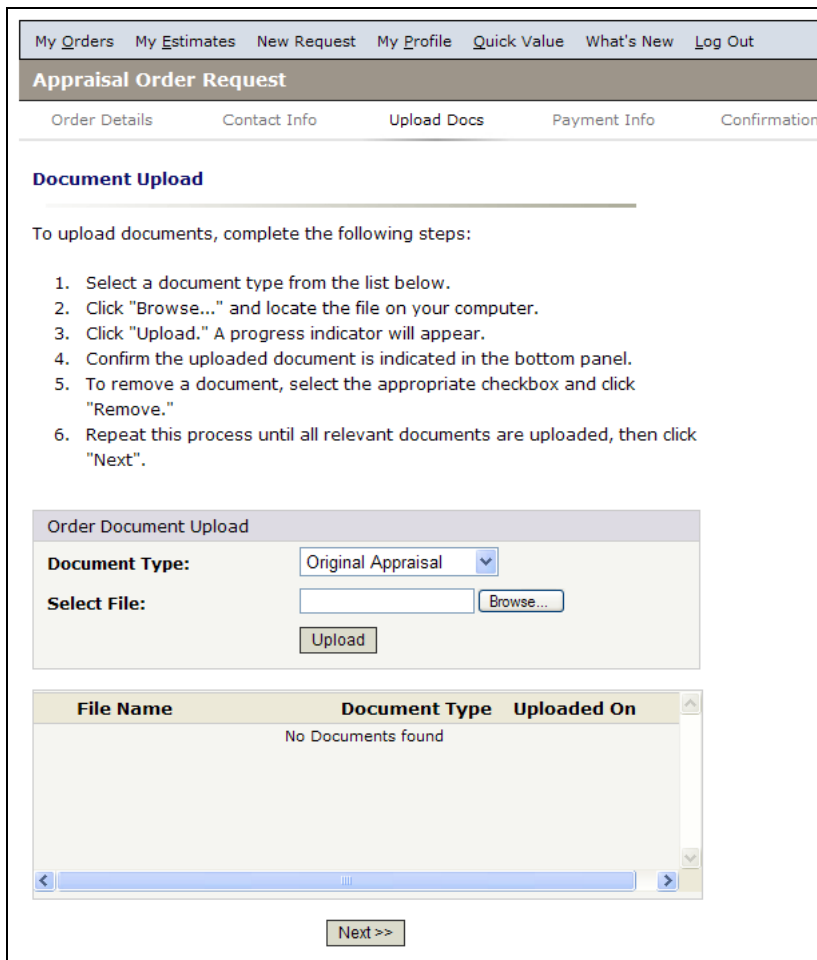
- To add another contact person, click the **Add** button. A blank Property Inspection Contacts page appears. Follow the steps described above.
- After completing your entries, click **Next** to go to the Document Upload screen.

If any required fields have been omitted, you will not be able to leave the page, Required fields are indicated by a red dot (●) If the user attempts to proceed without completing required fields, the textboxes turn red and the word “Required” (in red) is displayed next to the field. If incorrect data has been put in a field, the required field will turn reddish pink and display an “Invalid” message to the right of the field.

Document Upload Page

The Document Upload screen, illustrated below, allows you to upload the appropriate documents for the appraisal request to the system.

Document upload is optional.



My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Appraisal Order Request

Order Details Contact Info **Upload Docs** Payment Info Confirmation

Document Upload

To upload documents, complete the following steps:

1. Select a document type from the list below.
2. Click "Browse..." and locate the file on your computer.
3. Click "Upload." A progress indicator will appear.
4. Confirm the uploaded document is indicated in the bottom panel.
5. To remove a document, select the appropriate checkbox and click "Remove."
6. Repeat this process until all relevant documents are uploaded, then click "Next".

Order Document Upload

Document Type: Original Appraisal

Select File: Browse...

Upload

File Name	Document Type	Uploaded On
No Documents found		

Next >>

Document Upload page

To Upload a Document:

- 1) From the Document Type dropdown, select a document type from the list, illustrated below.



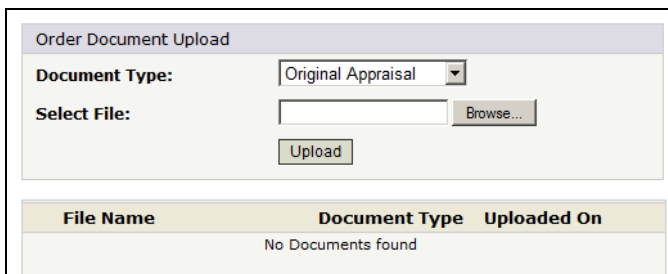
Order Document Upload

Document Type: Original Appraisal ▼

- Original Appraisal
- Preliminary Report
- Purchase Agreement

Document Type dropdown list

- 2) Click **Browse...** and locate the file on your computer.
 - 3) When you have located the file, click **Upload**. A progress indicator will display.
 - 4) To confirm that the document was uploaded, review the columns in the lower half of the screen. The file name, document type, and date and time the document was uploaded should appear, as illustrated below.
- If no documents were found, the message *No Documents found* appears in this section.



Order Document Upload

Document Type: Original Appraisal ▼

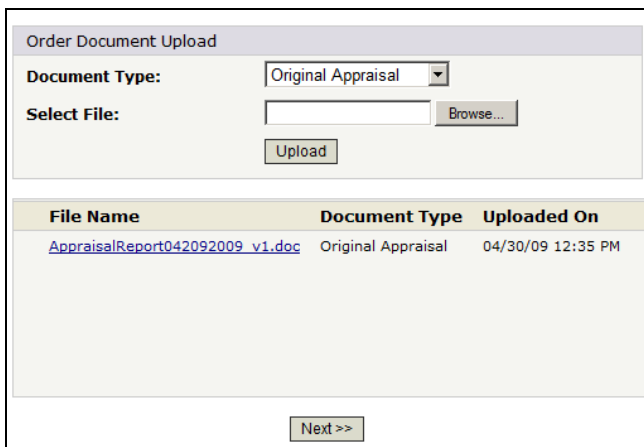
Select File: Browse...

Upload

File Name	Document Type	Uploaded On
No Documents found		

Document Upload page with No Documents found displayed.

- When a document has been uploaded, the file name appears in this section.



Order Document Upload

Document Type: Original Appraisal ▼

Select File: Browse...

Upload

File Name	Document Type	Uploaded On
AppraisalReport042092009_v1.doc	Original Appraisal	04/30/09 12:35 PM

Next >>

Document Upload page with uploaded documents displayed.


To Upload Additional Documents:

- To upload additional documents, repeat the steps described above.
- When you have uploaded all relevant documents, click **Next** to go to the Payment Information screen.

If any required fields have been omitted, you will not be able to leave the page, Required fields are indicated by a red dot (•) If the user attempts to proceed without completing required fields, the textboxes turn red and the word “Required” (in red) is displayed next to the field. If incorrect data has been put in a field, the required field will turn reddish pink and display an “Invalid” message to the right of the field.

Payment Information Page

The Payment Information screen, illustrated below, requests information regarding the payment method for the appraisal report.



AMCTrak Appraisal Request System
MORTGAGES - DATA - SOLUTIONS

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Appraisal Order Request

Order Details Contact Info Upload Docs **Payment Info** Confirmation

Payment Information

Payment by credit card required. You may enter your card information or you may enter your borrower's card number and information if you have received authorization to do so.

Payment Info

Payment Method: -- SELECT --

The Appraisal Fee Estimate (AFE) has been auto-generated based on information you have provided and standard appraisal fees in the area. Unique property characteristics or market conditions may result in a higher fee.

The estimated fee for this appraisal assignment will not exceed **\$425.00** without your further approval.

Once your appraisal request has been submitted, it will be assigned to an appraisal company that will finalize the appraisal quote and notify you for approval.

Create Order Request

Payment Information page

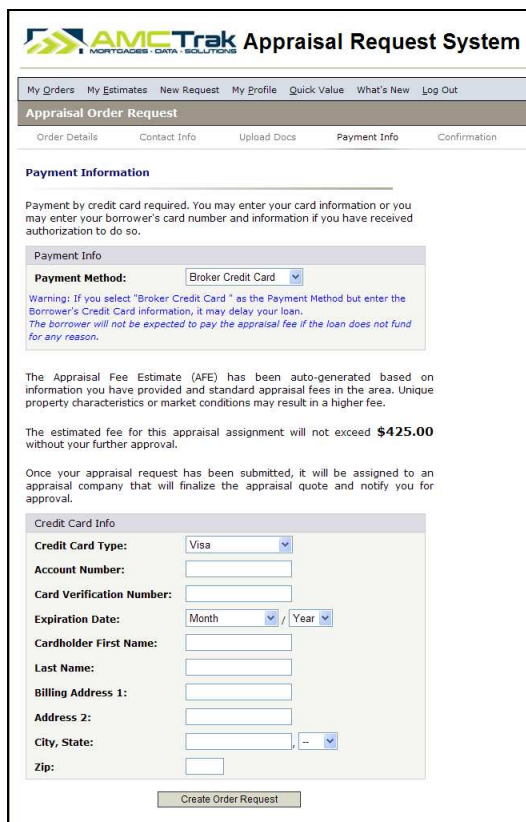
Payment Information

Payment Method

1) Select either your credit card information or your borrower's credit card information from the Payment Method dropdown list.

- Payment by credit card is required.
- When you select a payment method, the above screen expands to allow you to input credit card information.

The disclaimer appears that unique property characteristics or market conditions could result in a higher fee. The estimated fee for the appraisal is shown on the screen, with the statement that this fee will not exceed the amount shown without your further approval.



AMC Trak Appraisal Request System

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Appraisal Order Request

Order Details Contact Info Upload Docs **Payment Info** Confirmation

Payment Information

Payment by credit card required. You may enter your card information or you may enter your borrower's card number and information if you have received authorization to do so.

Payment Info

Payment Method:

Warning: If you select "Broker Credit Card" as the Payment Method but enter the Borrower's Credit Card information, it may delay your loan. The borrower will not be expected to pay the appraisal fee if the loan does not fund for any reason.

The Appraisal Fee Estimate (AFE) has been auto-generated based on information you have provided and standard appraisal fees in the area. Unique property characteristics or market conditions may result in a higher fee.

The estimated fee for this appraisal assignment will not exceed **\$425.00** without your further approval.

Once your appraisal request has been submitted, it will be assigned to an appraisal company that will finalize the appraisal quote and notify you for approval.

Credit Card Info

Credit Card Type:

Account Number:

Card Verification Number:

Expiration Date: /

Cardholder First Name:

Last Name:

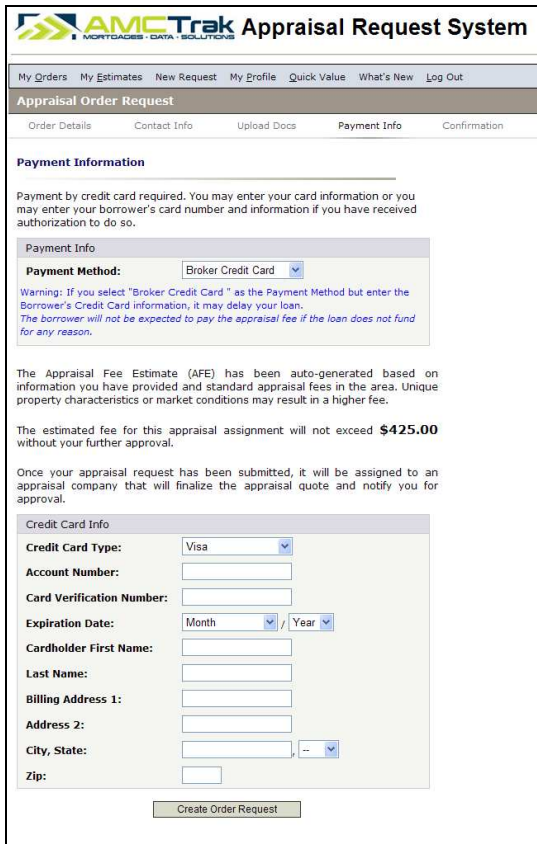
Billing Address 1:

Address 2:

City, State: --

Zip:

Payment Method – Borrower card selected



Payment Method – Broker card selected

Credit Card Info Section – Broker Card Selected

1) Enter your information as follows:

Credit Card Type – From the dropdown, select the credit card type to which the appraisal fee is to be charged.

Account Number – The account number of the credit card to which the appraisal fee is to be charged.

Card Verification Number – An additional code number for authentication of the credit card account. Its format (three or four digits) and its location on the card depends on the credit card type.

Expiration Date – From the Date and Month dropdown, select the date and month the credit card expires. From the Date dropdown, select the year that the credit card expires.

Cardholder First Name – The first name of the credit cardholder to whom the appraisal fee is to be charged.

Last Name – The last name of the credit cardholder to which the appraisal fee is to be charged.

Billing Address 1 – The street number and street name, or P.O. Box number to which the appraisal fee should be billed.

Address 2 – Optional. Use this field for additional address information, such as suite number or apartment number.

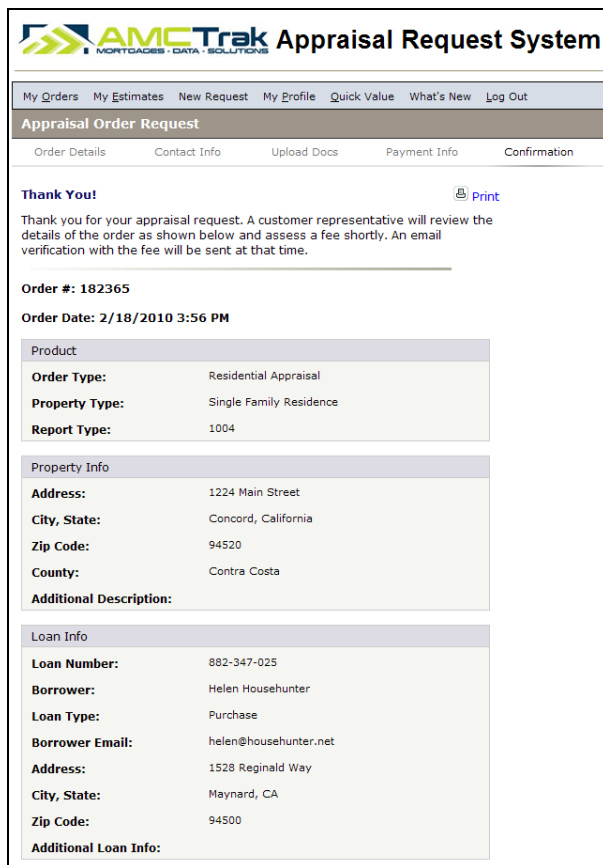
City, State – The city to which the appraisal fee should be billed. From the State dropdown, select the state to which the appraisal patient be billed.

ZIP – The ZIP code to which the appraisal fee should be billed.

- When you have completed your entries, click **Create Order Request**.

If any required fields have been omitted, you will not be able to leave the page, If the user attempts to proceed without completing required fields, the textboxes turn red and the word “Required” (in red) is displayed next to the field. If incorrect data has been put in a field, the required field will turn reddish pink and display an “Invalid” message to the right of the field.

- The AMCTrak system checks the credit card information for authorization to bill. The confirmation screen, illustrated below, appears.



AMCTrak Appraisal Request System	
My Orders My Estimates New Request My Profile Quick Value What's New Log Out	
Appraisal Order Request	
Order Details Contact Info Upload Docs Payment Info Confirmation	
<p>Thank You! Print</p> <p>Thank you for your appraisal request. A customer representative will review the details of the order as shown below and assess a fee shortly. An email verification with the fee will be sent at that time.</p>	
<p>Order #: 182365</p> <p>Order Date: 2/18/2010 3:56 PM</p>	
Product	
Order Type:	Residential Appraisal
Property Type:	Single Family Residence
Report Type:	1004
Property Info	
Address:	1224 Main Street
City, State:	Concord, California
Zip Code:	94520
County:	Contra Costa
Additional Description:	
Loan Info	
Loan Number:	882-347-025
Borrower:	Helen Househunter
Loan Type:	Purchase
Borrower Email:	helen@househunter.net
Address:	1528 Reginald Way
City, State:	Maynard, CA
Zip Code:	94500
Additional Loan Info:	

Thank You and Confirmation page


The screen displays the order number assigned by the system and the date and time the appraisal request was received, as well as the following details: Order Type, Property Type, Report Type, Property Info and Loan Info for the new appraisal request.

To Print The Order Confirmation:

- 1) Click the **Print** icon.
- 2) A dialog box for your printer appears. Make any adjustments, or just click the **Print** button.

To View the Status of Your New Appraisal Request:

- Click on the [My Orders](#) link at the top of the screen.
 - The newly requested appraisal will appear with the status *Pending Fee Approval*, as illustrated below.
 - If the order request meets the business requirements of the lender, the status of the request will change to *Approved*.

						
My Orders My Estimates New Request My Profile Quick Value What's New Log Out						
Order Activity: Test Broker						
Product Type:	-- Show All --	Status:	-- Active Orders --	Property Type:	-- All Property Types --	File No: <input type="text"/>
<input type="button" value="Search"/>		<input type="button" value="Clear"/>				
Borrower	Loan #	Address	City	State	Status	Due <input type="button" value="v"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Awaiting Inspection Date	01/10/10

Top of Order Activity page Displaying New Request

Main Menu Option: My Profile

Navigation: Click the [My Profile](#) link near the top of any AMCTrak page.

Use this function to view or edit your personal data, change your password, or give additional users access to your orders.

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Profile Information

Person Information

First Name: Test
Last Name: Broker
Job Title:
Email: brokertest7188@amctrak.com

Login Information

Username: testbroker@test.com
Old Password:
New Password:
Retype New Password:

Phone Numbers

Enter Number:
Phone Number Type: Primary

Type	Phone #	
<input type="checkbox"/> Work	(415) 323-2233	edit

Order Access

Additional Users (Check indicates access to your orders):
 There are no other users associated with .

Profile Information screen

Enter the following information:

Person Information

- First Name** – Your first name.
- Last Name** – Your last name.
- Job Title** – Your job title.
- Email** – Your business email.

Login Information

- Username** – Your AMCTrak login name. This field cannot be edited in My Profile. To update your username, contact your organization’s system administrator.
- Old Password** – If you wish to change your password, type your old password here.
- New Password** – If you are changing to a new password, type the new password here.
- Retype New Password** – For confirmation, retype your new password here exactly as in the previous field.

Click **Update** to save your entries to the system.

Phone Numbers:

Enter Number – Enter your telephone number, beginning with area code.

Phone Number Type – From the dropdown, select the telephone type.



Phone Number Type dropdown

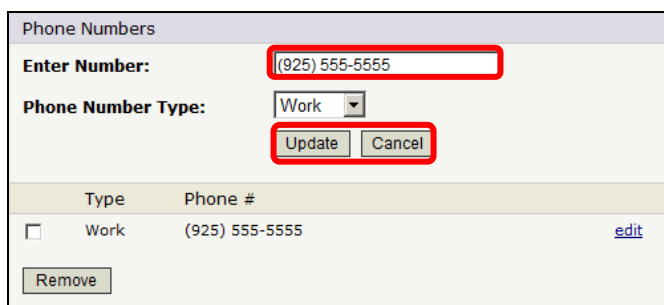
Click **Add** to save your information to the system. Your phone number appears below the **Add** button.

To Add Another Phone Number:

- Repeat the steps described above.

To Edit a Phone Number:

- 1) Click the edit link to the right of the phone number at the bottom of the Phone Numbers section. This populates the Enter Number field with the phone number, as illustrated below.



Type	Phone #
<input type="checkbox"/> Work	(925) 555-5555

Phone Numbers section in edit mode

- 2) Highlight the phone number in the Enter Number field and type over it with the new phone number.
- 3) If appropriate, make a new selection from the Phone Number Type dropdown.
- 4) Click **Update** to save your entries.

OR

- Click **Cancel** to discard your entries and retain the existing phone information.

To Remove a Phone Number:

Type	Phone #	
<input checked="" type="checkbox"/> Work	(925) 555-5555	edit
<input type="button" value="Remove"/>		

- 5) Check the box to the left of the phone number.
- 6) Then click **Remove**.
 - You do not receive a confirmation prompt, so make sure you want to delete the phone number.

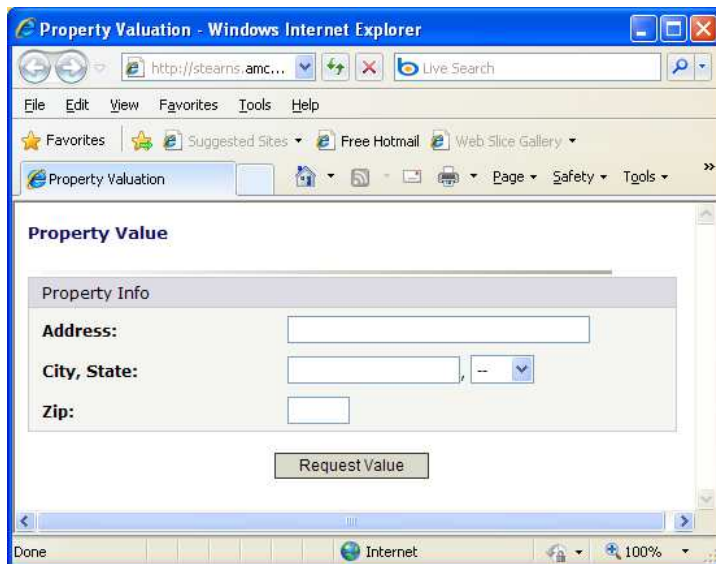
Order Access

Use this section if you wish to give additional users access to your orders.

- 1) Check the box to the left of each name to be given access.
- 2) Click **Update** at the bottom of the page to save your entries.

Main Menu Option: Quick Value

Navigation: Click on the [Quick Value](#) link and select Quick Value from the dropdown. Then select Quick Value from the dropdown. The Quick Value page appears.



Quick Value request dialogue

AMCTrak provides access to Quick Value, a research tool that utilizes third-party data and displays the data, including values for the subject property and recent comparable sales. In addition to a general estimate of the subject property's market value, this tool may help you determine an appraisal fee estimate.

In AMCTrak, click on the [Quick Value](#) Main Menu option

Complete the fields as follows.

Address – The address of the property to be appraised.

City, State – The city of the property to be appraised. Select the state of the property to be appraised from the adjacent dropdown list.

ZIP – Enter the ZIP code of the property to be appraised.

Note: If you enter just the ZIP Code, in most cases the city and state fields will auto-populate. If a ZIP code covers more than one city, you will be prompted to choose one.

After completing these fields, click the **Request Value** button. The Quick Value function prompts you to accept the terms of the service.

Terms of Use

This site is offered to you conditioned upon your acceptance of the following terms of use. Please read this agreement carefully before using this site.

Home value estimates are computed and provided by Vendor 1, Vendor 2 and Vendor 3. The terms of use for each of these sites are incorporated herein by reference and users of this site are bound by the terms of Vendor 1, Vendor 2 and Vendor 3 in addition to the terms listed herein. The terms of use for Vendor 1, Vendor 2 and Vendor 3 may be read at the following links:

Vendor 1 [Terms of Use](#)

I have read and agree to the terms of use for Vendor 1, Vendor 2 and Vendor 3, as well as the Terms of Use stated herein for this site.

Click the Terms of Use link to view detailed terms.

Quick Value Terms of Use dialog

If you agree with the Terms of Use, click the **Agree** button. Or, click **Cancel** to go back to the previous screen in AMCTrak.

If you click **Agree**, Quick Value checks three appraisal-information sites and returns estimated market value for the subject property, as well as information on several recent comps. A Property Value page displays the subject property and comps.

Orders New Request Compliance My Profile Admin Quick Value What's New Log Out

Property Value

Property Info

Address:

City, State: --

Zip:

Home value estimates for		
Vendor 1 Estimated Value:	\$369,864	<input type="button" value="Vendor 1"/>
Vendor 2 Estimated Value:	\$440,500	<input type="button" value="Vendor 2"/>
Vendor 3 Estimated Value:	\$378,657	<input type="button" value="Vendor 3"/>

Recently Sold Comparable Homes

Top of Property Value page

The top of the page displays three vendors' value estimates for subject property.

Legend: ● Searched Home ● Sold Comparable Homes

	Address	Sold Price	Sold On	Bed	Bath	Square Feet	Distance (miles)
●	999 Fictitious Way	--	--	3	2.0	1,366	--
●	Test01 Comp	\$380,000	09/18/2009	3	2.0	1,366	0.05
●	Test02 Comp	\$390,000	11/26/2008	3	2.0	1,422	0.14
●	Test03 Comp	\$334,000	01/05/2009	3	2.0	1,298	0.20
●	Test04 Comp	\$312,500	01/08/2009	3	2.0	1,387	0.29
●	Test05 Comp	\$395,000	08/20/2009	3	2.0	1,387	0.29
●	Test06 Comp	\$400,000	11/26/2008	3	2.0	1,284	0.33
●	Test07 Comp	\$399,000	11/14/2008	3	2.0	1,320	0.35

Bottom of Property Value page

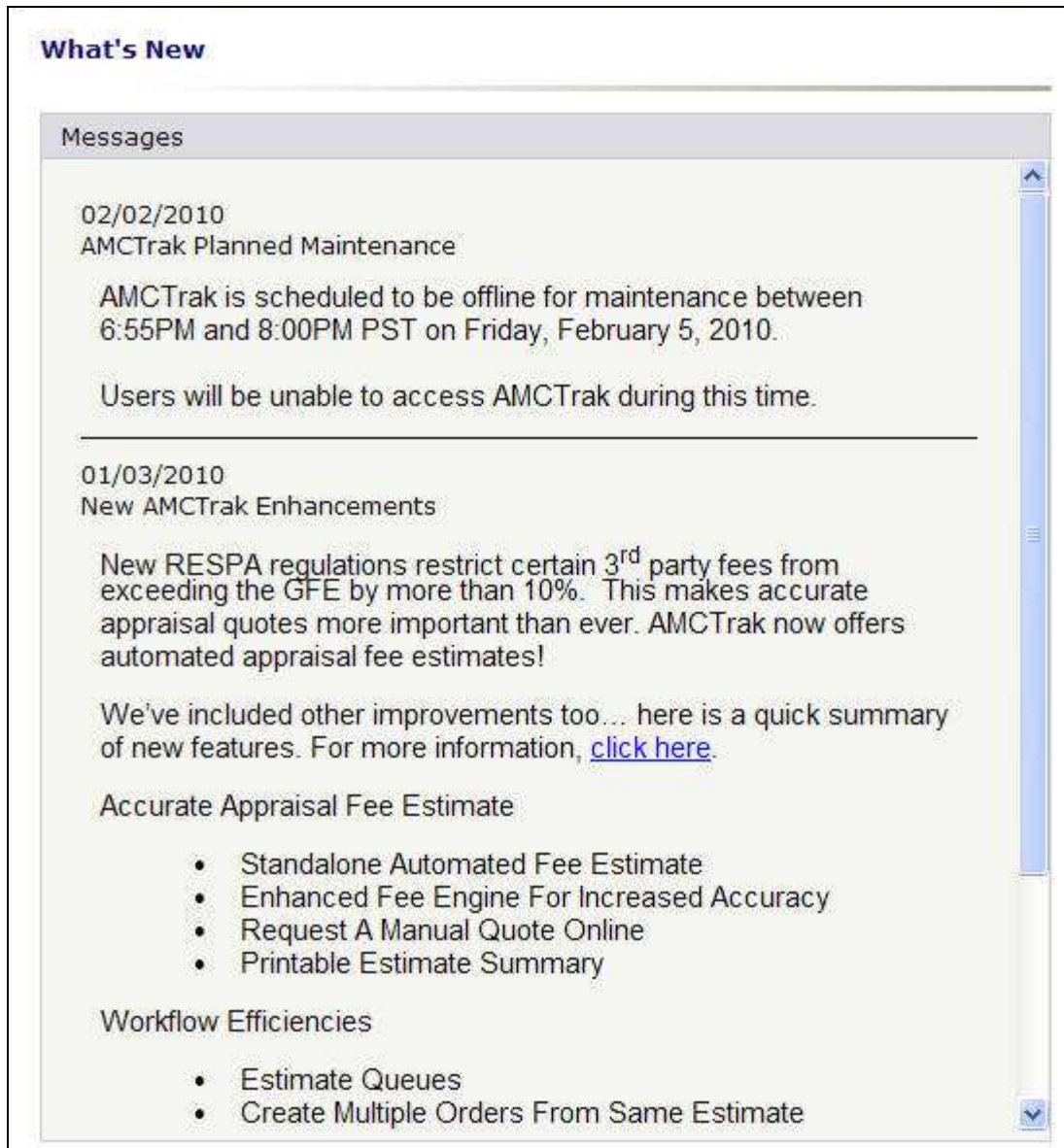
The bottom of the page displays key features of the subject property and of several comps, as well as recent sale prices and dates for the comps. The Distance column reports distances between the subject property and the comps.

- The subject property you entered is indicated by a red dot.
- Comps are indicated by blue dots.

To return to AMCTrak from Quick Value, click one of the Main Menu options at the top of the Quick Value screen.

Main Menu Option: What's New

Click on the [What's New](#) link and select What's New from the dropdown. The What's New page displays as shown below.



What's New

Messages

02/02/2010
AMCTrak Planned Maintenance

AMCTrak is scheduled to be offline for maintenance between 6:55PM and 8:00PM PST on Friday, February 5, 2010.

Users will be unable to access AMCTrak during this time.

01/03/2010
New AMCTrak Enhancements

New RESPA regulations restrict certain 3rd party fees from exceeding the GFE by more than 10%. This makes accurate appraisal quotes more important than ever. AMCTrak now offers automated appraisal fee estimates!

We've included other improvements too... here is a quick summary of new features. For more information, [click here](#).

Accurate Appraisal Fee Estimate

- Standalone Automated Fee Estimate
- Enhanced Fee Engine For Increased Accuracy
- Request A Manual Quote Online
- Printable Estimate Summary

Workflow Efficiencies

- Estimate Queues
- Create Multiple Orders From Same Estimate

“What's New” page

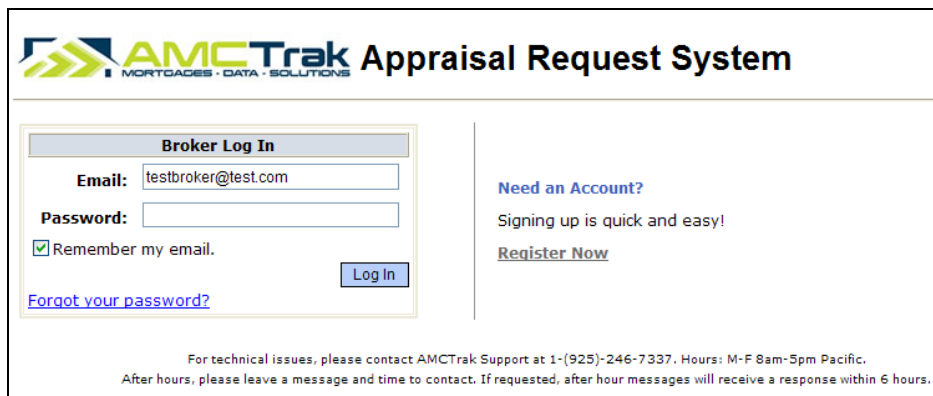
This is a scrollable page listing the past 30 days' system messages such as announcements of planned maintenance and system unavailability and new AMCTrak features. This information is cumulative, with the most recent messages at the top of the screen.

The most recent system messages also display on a splash screen after logging in.

Re-Entering the System

This section assumes that you have entered a new order, logged out of AMCTrak, and are re-entering the system to check on a previously submitted order.

- 1) Log onto the web site through the AMCTrak system:
[https://\[your company\].amctrak.com/Login.aspx](https://[your company].amctrak.com/Login.aspx)
- 2) Type your email and password in the fields provided on the AMCTrak system account login screen, illustrated below.



AMCTrak Appraisal Request System

Broker Log In

Email:

Password:

Remember my email.

[Forgot your password?](#)

Need an Account?
Signing up is quick and easy!
[Register Now](#)

For technical issues, please contact AMCTrak Support at 1-(925)-246-7337. Hours: M-F 8am-5pm Pacific.
After hours, please leave a message and time to contact. If requested, after hour messages will receive a response within 6 hours.

Appraisal Tracking System login screen

After Logging In Again

Once you have logged in, the Order Activity screen, illustrated below, is the first screen you will see in the AMCTrak Appraisal Request System process. Your name appears at the top left of the screen beneath the links.

The Order Activity screen lists all active appraisal orders assigned to you. You may access this screen at any time by clicking the [My Orders](#) link at the top of the page.

AMCTrak Appraisal Request System

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Order Activity: Test Broker

Product Type: -- Show All -- Status: -- Active Orders -- Property Type: -- All Property Types -- File No:

Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Pending Fee Approval	01/10/10
Test	600123456765	123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10
John Borrower	0103-1	1212 Test ST	Maui	HI	Incomplete	
John Borrower	0103-2	1212 Test ST	Kihei	HI	Pending Fee Designation	
TestCase102	100200300	302 Test St	San Jose	CA	Incomplete	
Test Broker	99999999	254 Test	Salt Lake City	UT	Incomplete	
John Borrower	0101-2	10756 Oak Shadow AVE	Las Vegas	NV	Incomplete	
John Borrower	0110-4	10556 Oak Shadow Ave	LAS VEGAS	NV	Incomplete	

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Order Activity page

Search Filters

By default, the dropdowns on the Order Activity screen are set to filter the search results as follows:

Product Type – *Show All*. All active appraisal request orders are displayed.

Status – *Active Orders*. All active appraisal request orders are displayed.

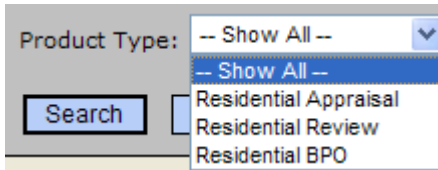
Property Type – *All Property Types*. All active appraisal request orders for all property types are displayed.

File – *Blank*. Type a file number in this window to execute a search.

To Search by Product Type:

- 1) To filter the search for a specific order type, click the Product Type dropdown and select from the list, illustrated below.

At the lender’s option, your ability to initiate or see review requests may be enabled or disabled in the system.

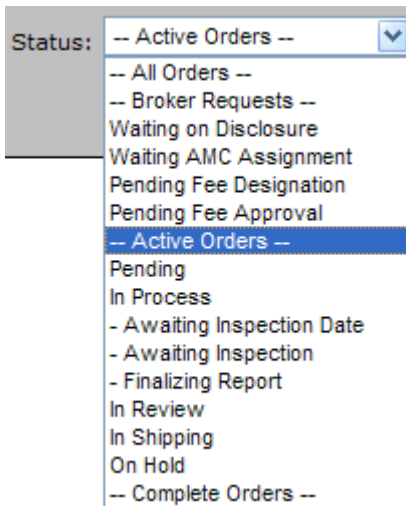


Product Type dropdown list

- 2) Then click **Search**. All active orders for the order type you selected will display.

To Search by Appraisal Status:

- 3) To filter the search by appraisal order status, click the Status dropdown and select from the list, as illustrated below.



Status dropdown list

- 4) Then click **Search**. All active orders for the status you selected will display.

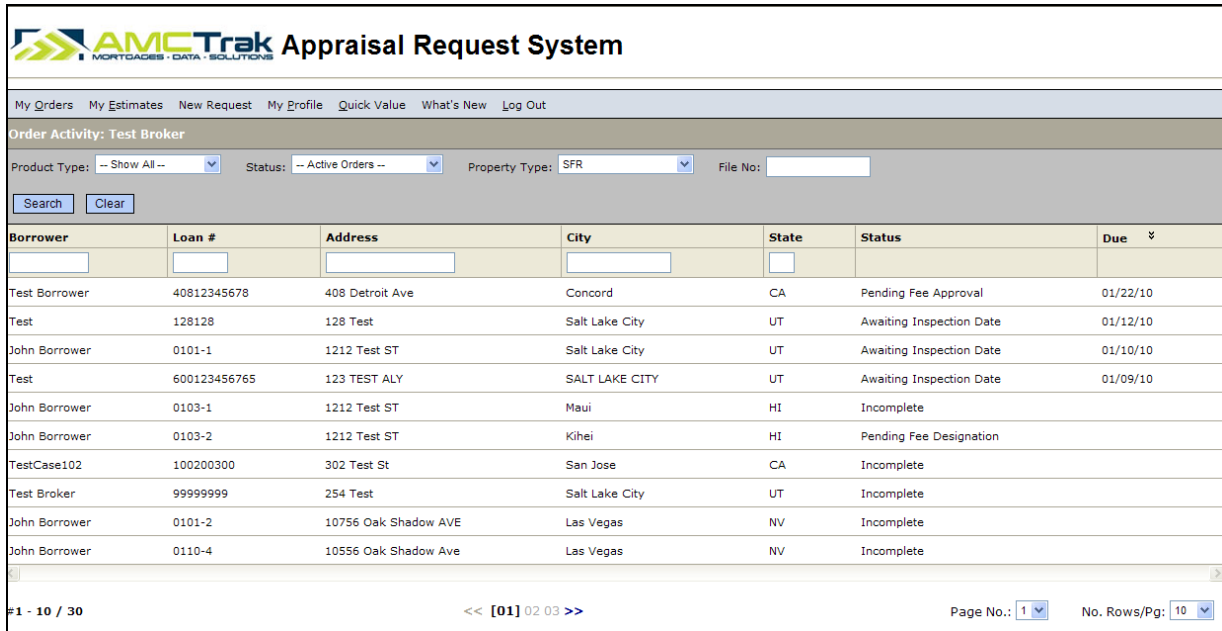
To Search by Property Type:

- 5) To filter the search by property type, click the Property Type dropdown and select from the list, as illustrated below.



Property Type dropdown list

6) Then click **Search**. All active orders for the property type you selected will display.



AMC Trak Appraisal Request System

My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Order Activity: Test Broker

Product Type: -- Show All -- Status: -- Active Orders -- Property Type: SFR File No:

Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Awaiting Inspection Date	01/10/10
Test	600123456765	123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10
John Borrower	0103-1	1212 Test ST	Maui	HI	Incomplete	
John Borrower	0103-2	1212 Test ST	Kihei	HI	Pending Fee Designation	
TestCase102	100200300	302 Test St	San Jose	CA	Incomplete	
Test Broker	99999999	254 Test	Salt Lake City	UT	Incomplete	
John Borrower	0101-2	10756 Oak Shadow AVE	Las Vegas	NV	Incomplete	
John Borrower	0110-4	10556 Oak Shadow Ave	Las Vegas	NV	Incomplete	

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Search Results

To Search by File Number:

- 1) To filter the search by file number, enter the file number in the field.
- 2) Then click **Search**. Details for the file number you entered will display.

Additional Search Criteria:

- 3) You may also search by borrower, loan number, address, city, or state by placing your cursor in the window below each of these items and typing in the information.
- 4) Then click **Search**.

To Navigate through Your Search Results:

- 1) Click the **Page No.** dropdown. If you have more than one page of results, click the number of the desired page.
 - Or you may click a grayed-out number at the bottom of the page to go to another page of results.

<< [01] **02** >>

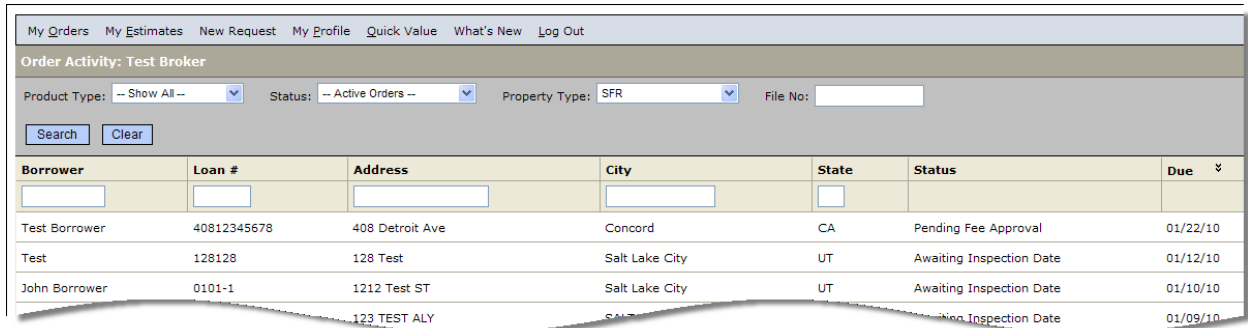
- 2) Click the **No. Rows/Pg.** dropdown to determine how many rows to be displayed per page. The default is 10 rows per page.
 - To clear your search data, click **Clear**.

Viewing Individual Appraisal Requests

When you have a results grid from a search described in the previous section, you can click on a row in the grid to “drill down” and view details for an individual request.

To Navigate from Search Results to an Individual Request:

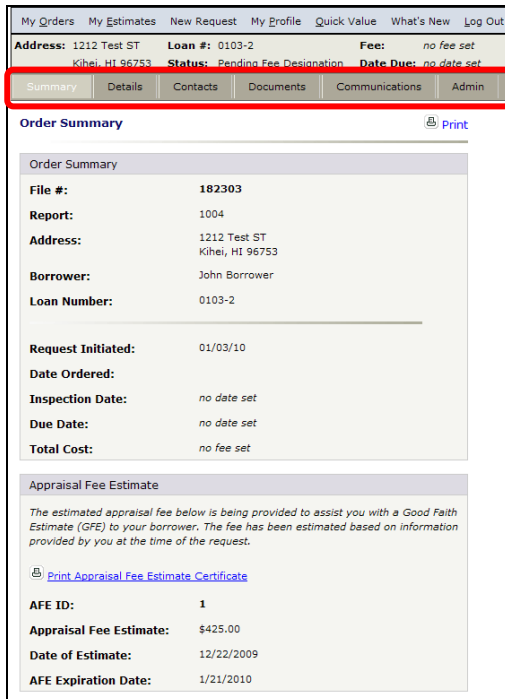
- Click anywhere in the desired row in the search results grid.



Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Awaiting Inspection Date	01/10/10
		123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10

Search Results

An Order Summary page with details relating to the appraisal request is displayed, as illustrated below.



My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Order Activity: Test Broker

Product Type: -- Show All -- Status: -- Active Orders -- Property Type: SFR File No:

Borrower	Loan #	Address	City	State	Status	Due
Test Borrower	40812345678	408 Detroit Ave	Concord	CA	Pending Fee Approval	01/22/10
Test	128128	128 Test	Salt Lake City	UT	Awaiting Inspection Date	01/12/10
John Borrower	0101-1	1212 Test ST	Salt Lake City	UT	Awaiting Inspection Date	01/10/10
		123 TEST ALY	SALT LAKE CITY	UT	Awaiting Inspection Date	01/09/10

Address: 1212 Test ST Loan #: 0103-2 Fee: no fee set
 Kihai, HI 96753 Status: Pending Fee Designation Date Due: no date set

Summary Details Contacts Documents Communications Admin

Order Summary [Print](#)

Order Summary

File #: 182303
 Report: 1004
 Address: 1212 Test ST
 Kihai, HI 96753
 Borrower: John Borrower
 Loan Number: 0103-2

Request Initiated: 01/03/10
 Date Ordered:
 Inspection Date: no date set
 Due Date: no date set
 Total Cost: no fee set

Appraisal Fee Estimate

The estimated appraisal fee below is being provided to assist you with a Good Faith Estimate (GFE) to your borrower. The fee has been estimated based on information provided by you at the time of the request.

[Print Appraisal Fee Estimate Certificate](#)

AFE ID: 1
 Appraisal Fee Estimate: \$425.00
 Date of Estimate: 12/22/2009
 AFE Expiration Date: 1/21/2010

Order Summary - first tab for individual appraisal request

The page has six tabs:

Summary – Displays the downloaded report for a specific appraisal request.

Details – Displays the residential appraisal Details screen for a specific appraisal request.

Contacts – Displays a list of people related to the transaction for inspection purposes.

Documents – Displays a list of uploaded documents relevant to the appraisal request, with links to individual documents.


Communication – Displays the Order Communications screen for a specific appraisal request.

Admin – Summarizes status history for the individual order, with effective dates.

Below is a detailed discussion of each tab.

Summary Tab

The Order Summary page, illustrated below, is displayed when you click anywhere in the desired row on the Order Activity page. Or you may click on the **Summary** tab.

My Orders		New Request		My Profile		Log Out	
Address: 1 Cottage Way Maynard, CA 94500		Loan #: 8802MM		Fee: no fee set		Date Due: no date set	
Status: Order Requested							
Summary	Details	Contacts	Documents	Communications			
Order Summary				 Print			
Order Summary							
File #:	162399						
Report:	1004						
Address:	1 Cottage Way Maynard, CA 94500						
Borrower:	Clara Cottage						
Loan Number:	8802MM						
<hr/>							
Date Submitted:	04/30/09						
Inspection Date:	no date set						
Due Date:	no date set						
Total Cost:	no fee set						

Order Summary page

The screen displays the information for the downloaded report(s) you submitted.

File # – The file number of the new appraisal request.

Report – The type of report requested.

Address – The address of the borrower.

Borrower – The name of the borrower.

Loan Number – The number of the borrower's loan.

Date Submitted – The date the appraisal request was submitted.

Inspection Date – The date on which the appraisal inspection is scheduled. If no date has been set, the message displays *no date set*.

Due Date – Due date for the appraisal report. If no date has been set, the message displays *no date set*.

Total Cost – The total fee for the appraisal inspection. If no fee has been set, the message displays “*no fee set.*”

To Print This Page:

- 1) Click the **Print** icon near the top right corner of the screen.
- 2) A dialog box for your printer appears. Make any adjustments, or just click **Print**.

Details Tab

Click on the **Details** tab to display the Residential Appraisal Details screen, illustrated below.

My Orders	My Estimates	New Request	My Profile	Quick Value	What's New	Log Out
Address: 1212 Test ST Kihei, HI 96753		Loan #: 0103-2		Fee: no fee set		
		Status: Pending Fee Designation		Date Due: no date set		
Summary	Details	Contacts	Documents	Communications	Admin	

Residential Appraisal Details [Print](#)

Lender	
Branch:	Cranford, NJ: 6 Commerce Dr, 2nd Fl
Account Representative:	Cara DeStefano

Product	
Order Type:	Residential Appraisal
Property Type:	Single Family Residence
Report Type:	1004

Property Info	
Address:	1212 Test ST
City, State:	Kihei, Hawaii
Zip Code:	96753
County:	Maui
Additional Description:	

Loan Info	
Loan Number:	0103-2
Borrower:	John Borrower
Loan Type:	Purchase
Borrower Email:	borrower@yahoo.com
Address:	123 Main St
City, State:	Pleasant Hill, CA
Zip Code:	94523
Additional Loan Info:	

Residential Appraisal Details page

The screen displays the following information:

Branch – The branch where the Lender is located.

Account Representative – The name of the lending officer handling the appraisal.

Order Type – The type of appraisal, e.g. residential.

Property Type – The type of property, e.g. single-family residence, condo.

Report Type – The type of report requested.

Address – The address of the subject property.

City, State – The city and state of the subject property.

ZIP Code – The ZIP code of the subject property.

County – The County of the subject property.

Additional Description – Any additional appropriate description of the subject property.

Loan Number – The number of the loan.

Borrower – The first and last name of the borrower.

Loan Type – The type of loan, e.g., purchase or refinance.

Borrower Email – The e-mail address of the borrower.

Address – The street address or P.O. Box of the borrower.

City, State – The city and state of the borrower.

ZIP Code – The ZIP code of the borrower.

Additional Loan Info – Any additional appropriate information regarding the loan.


To Print This Page:

- 3) Click the **Print** icon at the top right of the screen.
- 4) A dialog box for your printer appears. Make any adjustments, or just click **Print**.

Contacts Tab

Click on the **Contacts** tab to display the Order Contacts page, illustrated below.

Address: 1 Cottage Way Maynard, CA 94500	Loan #: 8802MM	Fee: no fee set
	Status: Order Requested	Date Due: no date set
Summary	Details	Contacts
	Documents	Communications

Order Contacts  Print

Inspection Contacts			
Relation	Name	Phone#	Email
Selling Agent	Sam Seller	(111) 111-1111 (222) 222-2222	

Order Contacts page

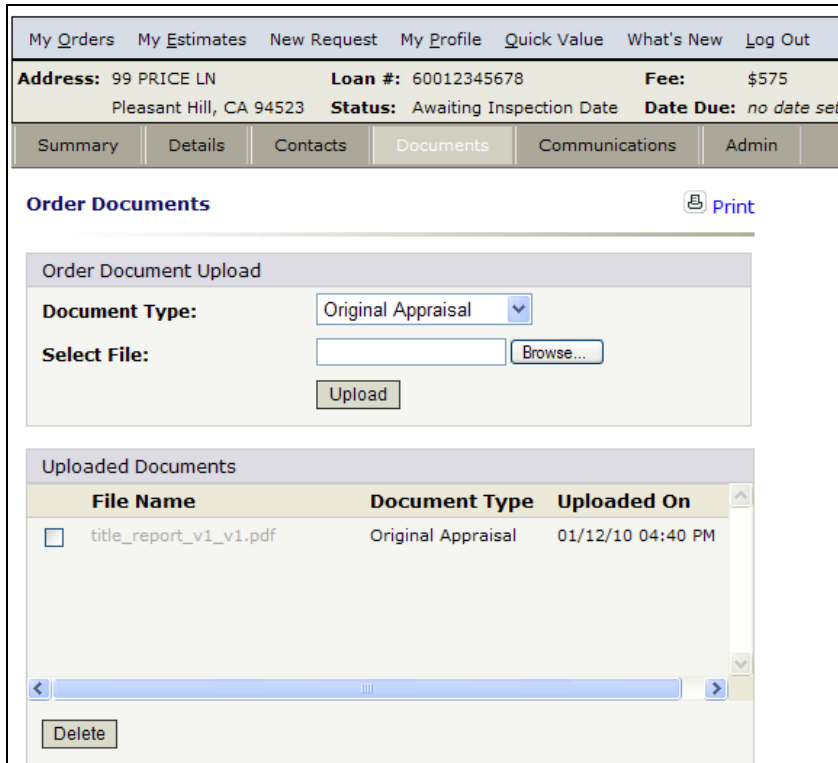
This page displays the relation, name, phone number and email for the appraisal contact.

To Print This Page:

- 1) Click the **Print** icon at the top right of the screen.
- 2) A dialog box for your printer appears. Make any adjustments, or just click **Print**.

Documents Tab

Click on the **Documents** tab to display the Order Documents page, illustrated below.



My Orders My Estimates New Request My Profile Quick Value What's New Log Out

Address: 99 PRICE LN Loan #: 60012345678 Fee: \$575
Pleasant Hill, CA 94523 Status: Awaiting Inspection Date Date Due: no date set

Summary Details Contacts Documents Communications Admin

Order Documents [Print](#)

Order Document Upload

Document Type: Original Appraisal

Select File: [Browse...](#)

[Upload](#)

Uploaded Documents

File Name	Document Type	Uploaded On
<input type="checkbox"/> title_report_v1_v1.pdf	Original Appraisal	01/12/10 04:40 PM

[Delete](#)

Order Documents page

To Upload a Document:

- 1) From the Document Type dropdown, select a document type from the list, as illustrated below.



Order Document Upload

Document Type: Original Appraisal

- Original Appraisal
- Preliminary Report
- Purchase Agreement

Document Type dropdown list

- 2) Click **Browse...** and locate the file on your computer.
- 3) When you have located the file, click **Upload**. A progress indicator will display.
- 4) To confirm that the document was uploaded, review the columns in the Uploaded Documents section. The file name, document type, and date and time the document was uploaded will appear, as illustrated below.

- If no documents were found, the message *No Documents found* appears in this section.
- When a document has been uploaded, the file name appears in this section.

Uploaded Documents		
File Name	Document Type	Uploaded On
<input type="checkbox"/> AppraisalReport042092009_v1.doc	Original Appraisal	04/30/09 03:50 PM

Document Upload page with uploaded documents is played

To Upload Additional Documents:

- To upload additional documents, repeat the steps described above.

To Delete a Document:

- To remove a document from the Received Documents section, select the checkbox next to the document to be removed, and click **Delete**.

Uploaded Documents		
File Name	Document Type	Uploaded On
<input type="checkbox"/> title_report_v1_v1.pdf	Original Appraisal	01/12/10 04:40 PM
<input checked="" type="checkbox"/> Appraisal01252010_v1.doc	Original Appraisal	02/18/10 04:55 PM

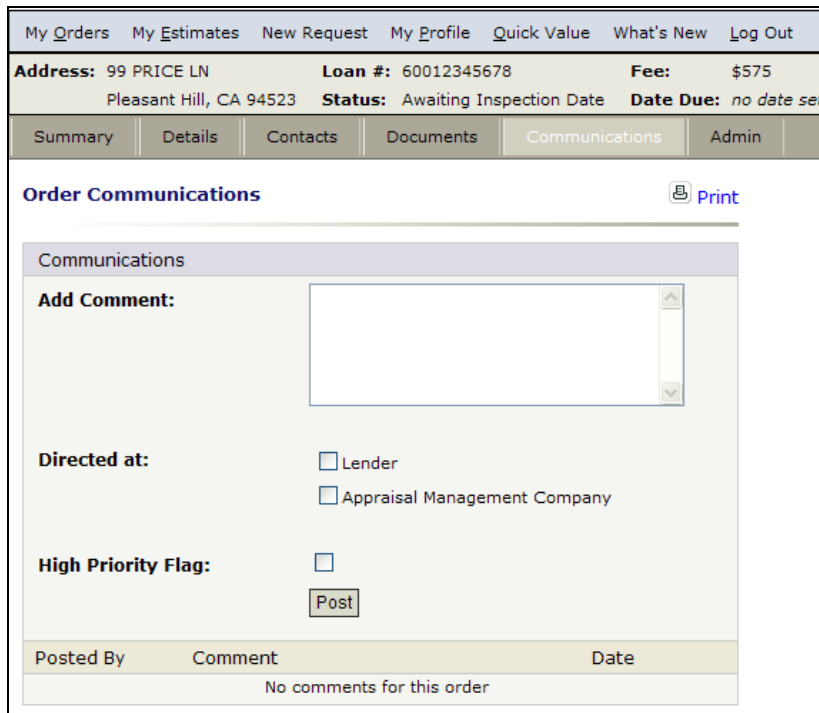
Uploaded Documents page with box checked for deletion

The checkbox and **Delete** button are visible only when at least one document has been uploaded.

Communications Tab

Use the Order Communications page to send a communication to designated recipients.

- 1) Click on the **Communications** tab to display the Order Communications page, illustrated below.



Order Communications page

- 2) Type a message in the Add Comment text window.
- 3) Check the appropriate boxes across from "Directed at" to route the message as desired.
- 4) If desired, check the High Priority Flag.
- 5) Click **Post** to transmit the communication.

Once you have sent your comments, they will be shown in the **Posted By** section, with comments and date sent.

Posted By	Comment	Date
Benjamin Broker	Would like to expedite this request.	05/01/09 02:23 PM
<i>Message from Broker directed at AMC</i>		

"Posted By" section of Order Communications

If no comments have been sent, the message "No comments for this order" will display.


To Print This Page:

- 1) Click the **Print** icon at the top right of the screen.
- 2) A dialog box for your printer appears. Make any adjustments, or just click **Print**.

Admin Tab

The Admin tab summarizes status history for the individual order, with effective dates.

My Orders	My Estimates	New Request	My Profile	Quick Value	What's New	Log Out
Address: 99 PRICE LN Pleasant Hill, CA 94523		Loan #: 60012345678		Fee: \$575		Date Due: no date set
Status: Awaiting Inspection Date						
Summary	Details	Contacts	Documents	Communications	Admin	

Order Administration  [Print](#)

Order Status		
Current Status:	Awaiting Inspection Date	
Status History	Initiated By	Date Entered
Awaiting Inspection Date	Test Broker	2/12/2010 5:42:27 PM
Pending Fee Designation	Test Broker	12/30/2009 11:27:45 AM
Incomplete	Test Broker	12/30/2009 11:25:22 AM

Admin tab for an individual order

To Print This Page:

- 1) Click the **Print** icon at the top right of the screen.
- 2) A dialog box for your printer appears. Make any adjustments, or just click **Print**.

Final Steps

After the new appraisal request has been entered into the AMCTrak system and the Lender reviews the request, the following steps need to be completed.

Lender

Complete the following:

- 1) Approves or rejects the appraisal request.
 - If the Lender approves the appraisal request, the appropriate parties are notified that the request is approved.
 - If the Lender rejects the appraisal request, the appropriate parties are notified that the request is rejected, and the transaction is closed.
- 2) Selects the AMC using lender business requirements and forwards the appraisal request to the AMC. The status of the order is *Approved*.

AMC

- The AMC receives the appraisal request.
- If the AMC accepts the appraisal request, a confirmation receipt is sent to the Lender.
- If the AMC rejects the appraisal request, the order is placed in a queue.
- If the assignment is accepted, the AMC begins work on the appraisal assignment.
- Notifications are sent to the appropriate parties at each key status change.
- The AMC assigns the order to an appraiser.
- The appraiser contacts the property contact to set up an inspection appointment.
- After the appraisal has been completed, email notifications are sent to the appropriate parties.
- The AMC sends a copy of the appraisal report to the borrower email or U.S. mail if necessary.

Status Check

- At any time, the Broker can log into the system and check the status of an order.

Lender

- Completes the loan process with the Mortgage Broker once the appraisal is successfully completed.

For Information or Further Assistance

If you need additional information or assistance in using this application, please contact AMCTrak Customer Support, support@propsci.com or 1-(925)-246-7337. Hours: M-F 8am-5pm Pacific.