CoreLogic®

Automated Appraisal Review

Shorter review time. Higher appraisal quality.

RealView User Guide

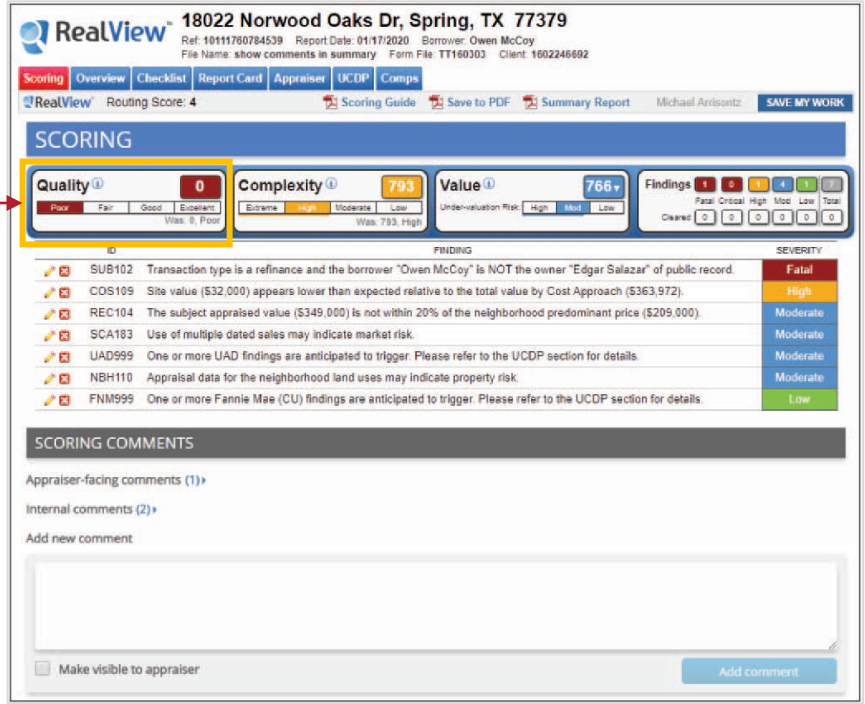
Learn how you can achieve fast analysis, up-to-date compliance assessment, and advanced insights.

User Guide

Scoring

- The RealView *Scoring* page is an at-a-glance view of potential issues that impact the quality of an appraisal report. It is not meant to replace the reviewer. Instead, it proactively brings issues to the reviewer's attention, eliminating the need to review the appraisal line by line. The RealView *Scoring* section is proprietary to CoreLogic and is not customizable.

- There are three scores provided for RealView orders: **Quality**, **Complexity**, and **Value**.
  - The **Quality** Score is where we look at compliance, credibility and completeness.
    - **Compliance**
      The appraisal is checked against published guidelines including:
      - UAD
      - USPAP
      - GSE
    - **Credibility**
      Looks at the methodologies and techniques used by the appraiser as compared to industry best practices.
    - **Completeness**
      This is where RealView makes sure all of the boxes are checked, all of the "i's" are dotted and the "t's" crossed.
    - The scoring range is from 0-1000.
      - Excellent is 801-1000
      - Good is 501-800
      - Fair is 201-500
      - Poor is 0-200



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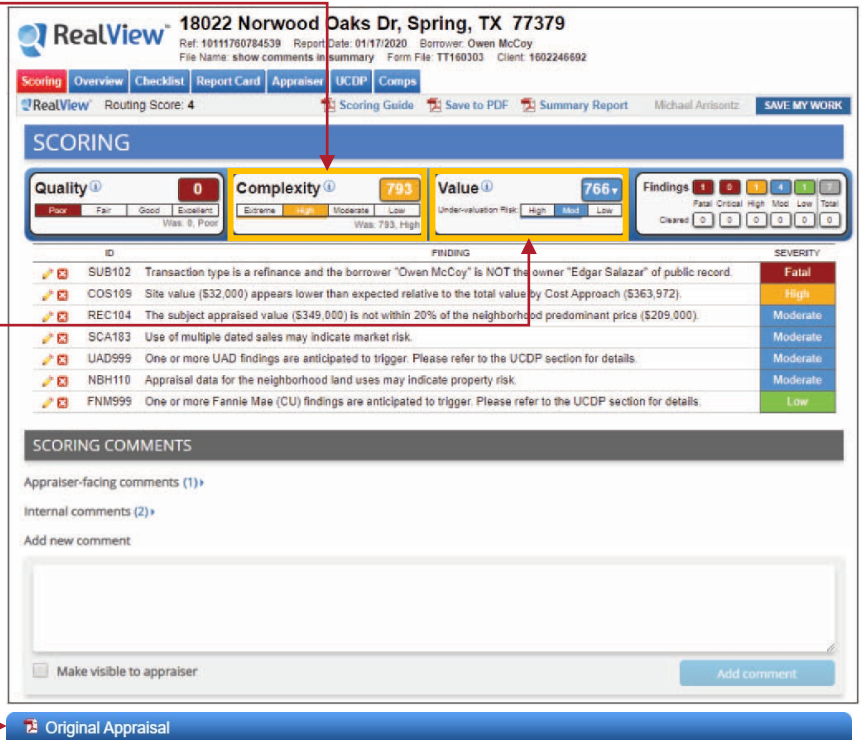
Scoring (continued)

- The **Complexity** score looks at how difficult the assignment is. Is it a rural property on acreage, or a cookie-cutter property in a suburban neighborhood?
  - The complexity scoring range is also from 0-1000.
    - Low complexity is 951-1000
    - Moderate complexity is 801-950
    - High complexity is 501-800
    - Extreme complexity is 0-500
- The **Value** score measures how close the appraised value is to the estimated market value of the subject property. There are three levels (low, moderate, and high) and it will tell you if there is an over-valuation or under-valuation risk.

- There are 5 levels of severity for the findings box: they are low, moderate, high, critical and fatal.

- You can access the appraisal report by clicking on the **blue bar** at the bottom of the screen, which is always visible. You can also launch the appraisal into a new browser by clicking on the arrow.



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Scoring (continued)

Clearing a scoring rule

1. If you choose to disregard a scoring rule because it isn't deemed an issue, click the **x icon** next to the rule to strike it out. This will automatically recalibrate the scores shown above.

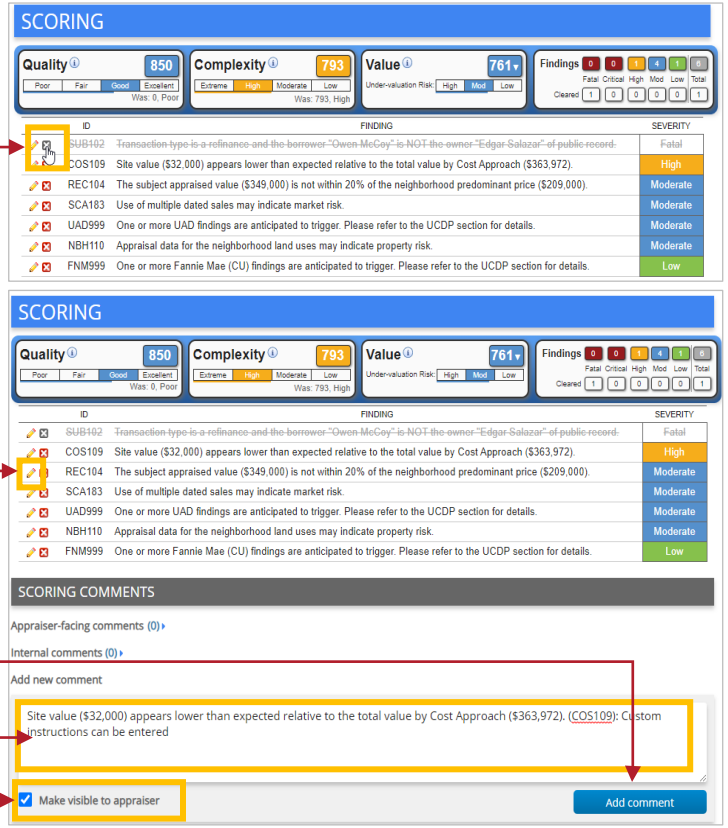
Sending a scoring rule as a revision request

1. If you want to send a scoring rule as a revision request to the appraiser, click the **pencil icon** next to the rule. The rule will appear in the comment box below. You can customize the revision request verbiage by typing in the comment field.

2. Check **Make visible to appraiser** to make it appraiser-facing. Otherwise, it will only show internally to reviewers.

3. Click **Add comment** to save your comment.

4. All revision items, including appraiser-facing comments, will be sent to the appraiser once you click **Save and send revisions** within the *Checklist* section.



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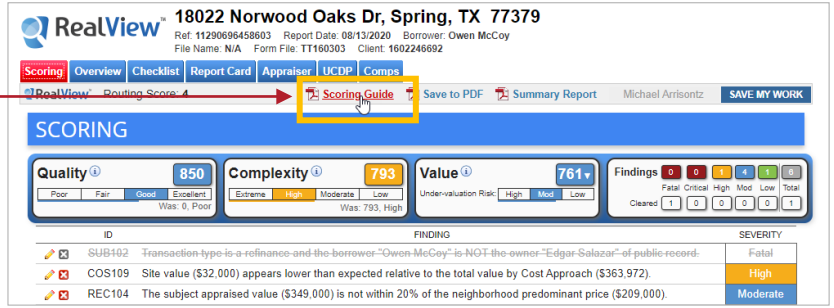
Scoring (continued)

Accessing the scoring guide PDF

1. Click the **Scoring Guide** link above the scoring section to download a PDF version of the scoring guide.



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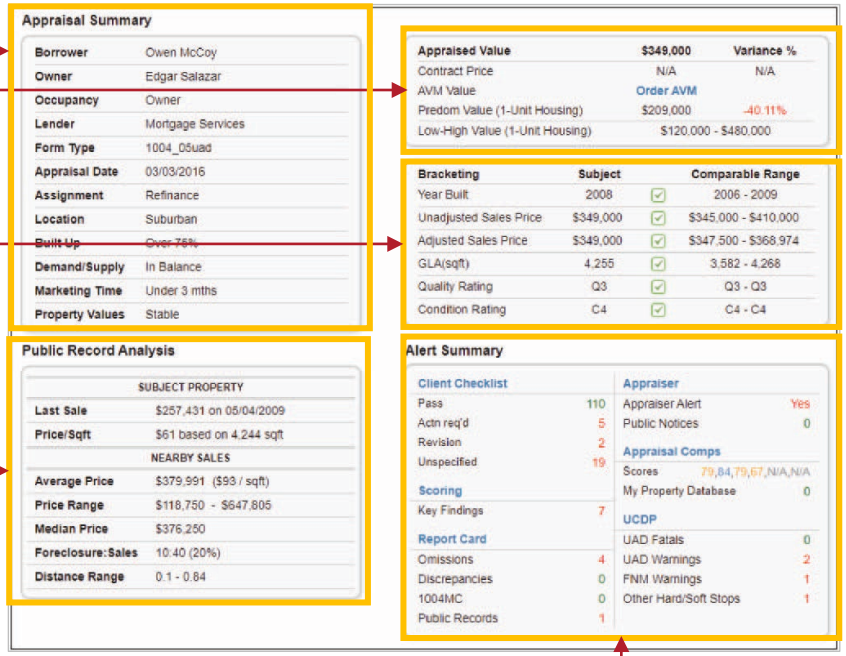
Appraisal Summary

- The **Appraisal Summary** data located below the scoring information is about the appraisal itself.
  - You can see owner, occupancy, lender, form type, appraisal date, assignment type, location, and more.
- The **Public Record Analysis** is available for those using MLS + Public Record data in their RealView reports. Here you can see the last sale date, sale price, the average and median price for the area, foreclosure activity and distance range for comparable sales.
- On the right-hand side you'll see the **Appraised Value**, the contract price if it is a purchase, the predominant value for the area and a low to high value range.
- In the **Bracketing** section, you will see how well the appraiser was able to accomplish bracketing. The subject property info is on the left and the comparable range is on the right. The green check marks indicate that the subject property is within the comparable range. A red X means that the subject is outside of the comparable range.
- The last section is the **Alert Summary**. This is a snapshot of each of the RealView tabs. The blue links are all navigational links to the *Checklist*, *Scoring*, *Report card*, *Appraiser*, *UCDP* and the *Comparable Sales* tabs.



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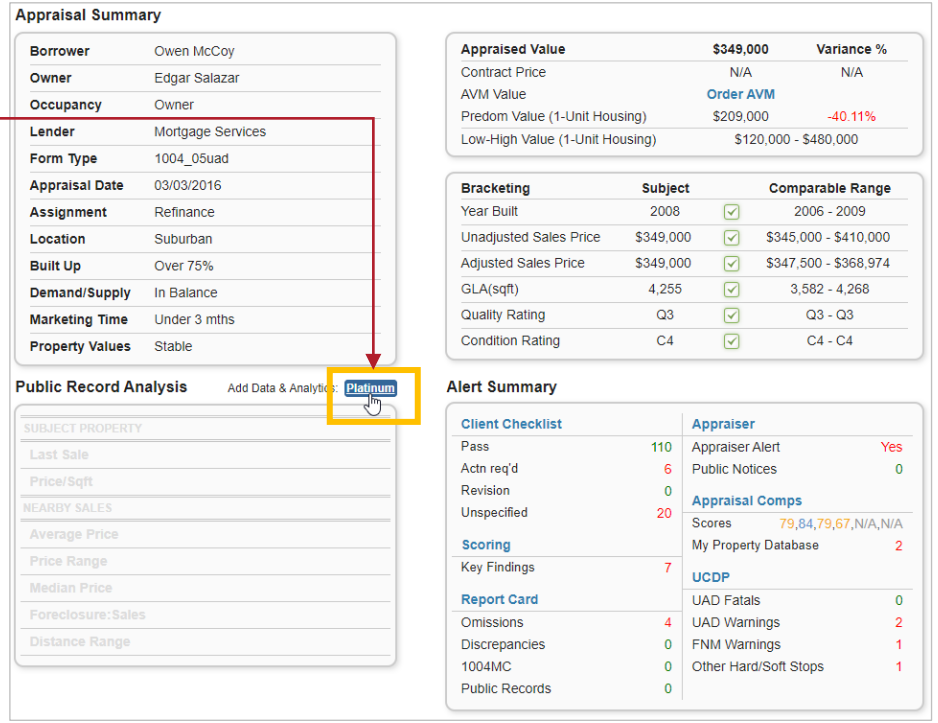
Appraisal Summary (continued)

View the public record analysis

If public record data isn't shown in your RealView report by default, you can click the **Platinum** button next to the *Public Record Analysis* header. This button is only available if your account supports ordering public record data.

This feature isn't currently available in the Mercury Network platform.



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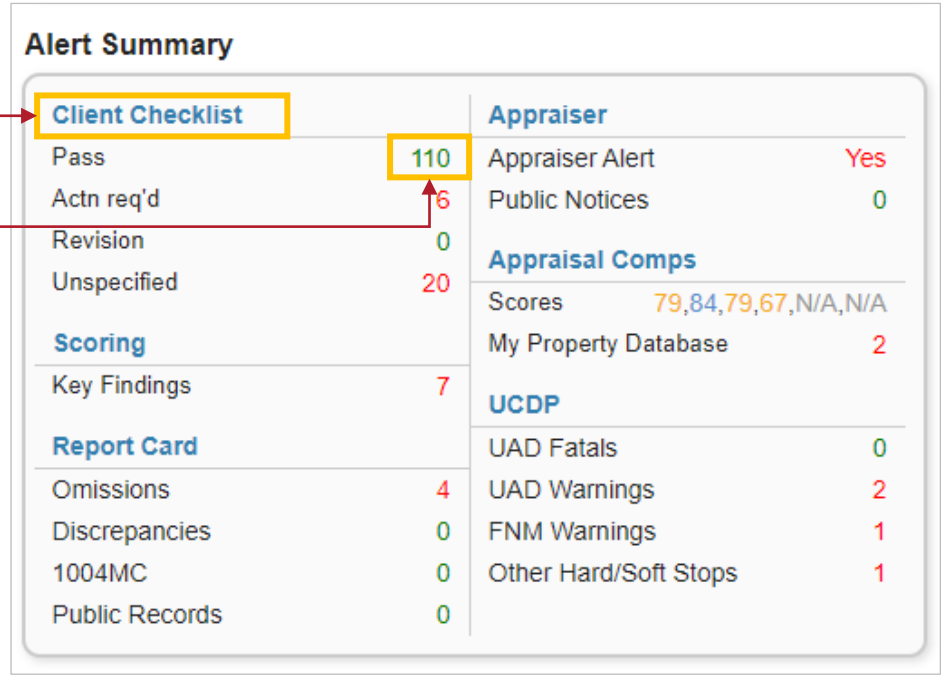
Appraisal Summary (continued)

Identify alerts within the *Alerts Summary*

- Clicking on an alerts category or count will quickly navigate you to that section of the RealView report.



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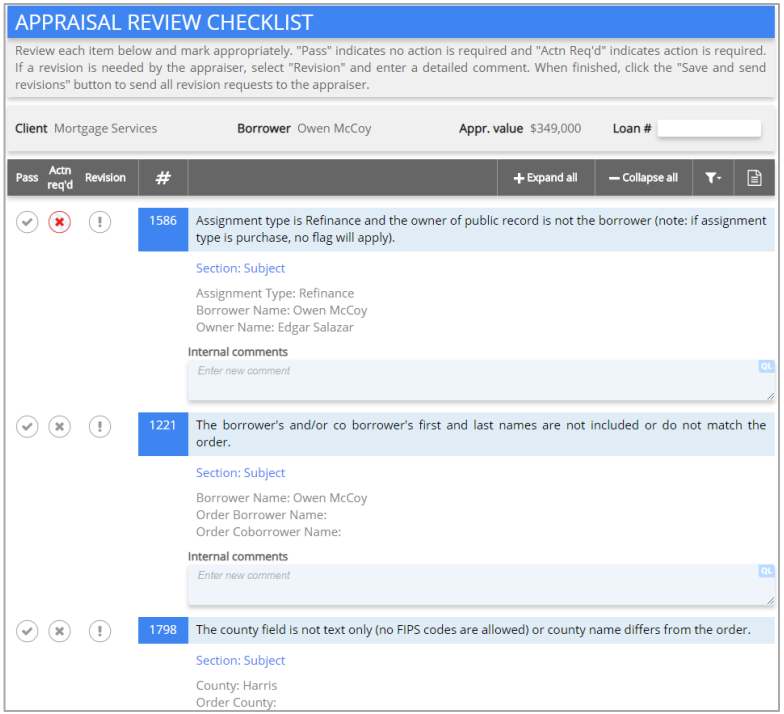
Appraisal Review Checklist

- This section is where you will perform the bulk of the review. RealView offers an out-of-the-box ruleset that analyzes the report for common issues. The goal is to ensure that your automated review is surfacing appraisal risk factors as effectively as a human would. If you would benefit from additional rules, please notify your Account Manager or your Sales Application Engineer at Mercury Network.

- By default, your account is set to show rules that were marked *Action Required* and *Unspecified*.
  - *Action Required* means an issue was identified and you need to take a closer look at it.
  - *Unspecified* rules are manual rules which cannot be automated.
  - *Pass* means no issues were identified. You can view passed rules by selecting that option in the checklist filters. They're hidden by default so you can focus on rules that need your attention.



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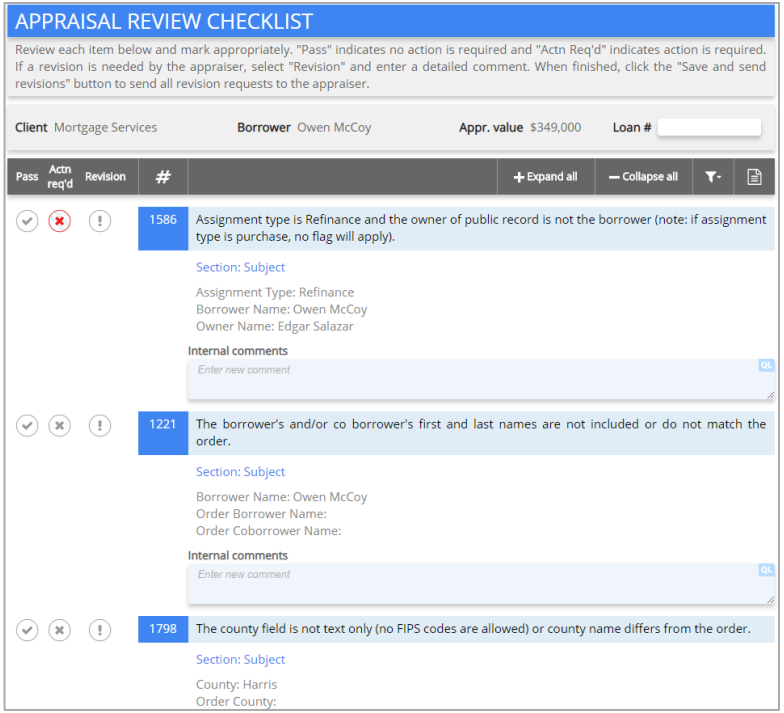
Appraisal Review Checklist (continued)

- You can mark a rule as a revision and enter a comment for the appraiser. You can also use a QuickList, which allows you to enter commonly used comments to eliminate repetitive typing.
- RealView provides the rule and supporting details (which is taken directly from the appraisal report) for each rule. If the RealView report was ordered via Mercury Network, the appraisal data will be compared to the order data, and discrepancies will be marked *Action Required*.
- If a rule is marked *Action Required*, the reviewer or underwriter can see how the info was displayed in the report, enter a comment instructing the appraiser about a revision, or mark the rule as *Pass*.
- Once you have gone through the items on the checklist, you have a final spot to view and edit all of your comments and instructions before sending the revision request to the appraiser. These comments and revision request instructions will be noted in the audit trail within the Mercury Network order.



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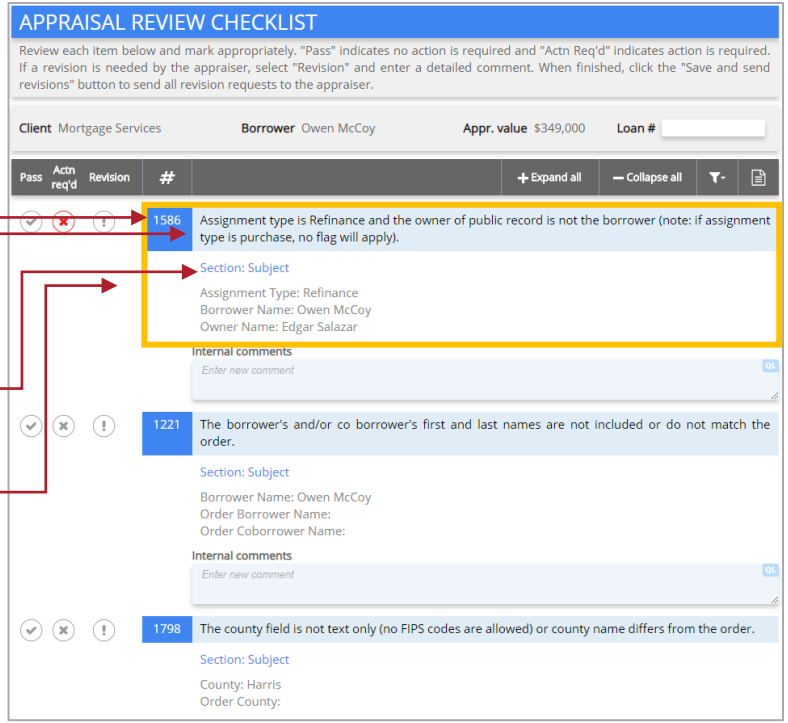
Appraisal Review Checklist (continued)

Understanding a rule's components

- **Rule ID**: The unique identifier for a rule
- **Rule Description**: A summary of the rule
- **Rule Section**: The category that a rule is assigned, which is typically an appraisal section
- **Rule Instructions**: Recommended instructions for the reviewer when reviewing a rule
- **Supporting Details**: Information typically pulled from the appraisal report and/or order that supports the rule



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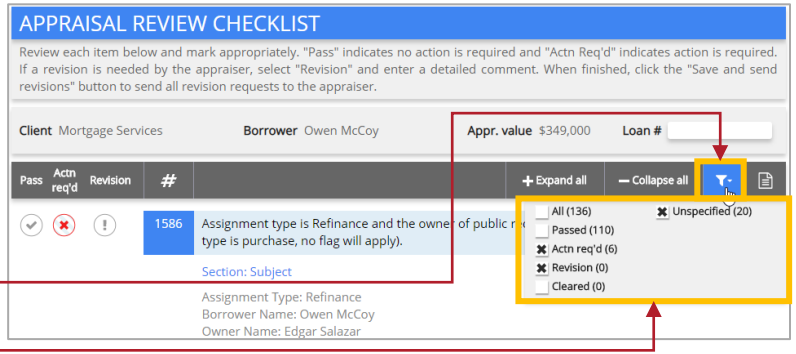
Appraisal Review Checklist (continued)

Use checklist filters to change which rules are shown

- When your RealView report is generated, the checklist section will only show *Passed* or *Unspecified* rules by default.
- If you prefer to see all checklist rules by default, regardless of the disposition then we can configure your account this way. Contact us at 1-800-900-4954 to update your account settings.
- You can override checklist filters manually by clicking the **filter icon** and selecting one or more options.
  - **All**: Show all rules.
  - **Passed**: Show rules with a *Pass* disposition.
  - **Actn Req'd**: Show rules with an *Action Required* disposition.
  - **Revision**: Show rules with a *Revision* disposition.
  - **Cleared**: Show rules that initially fired as *Action Required* but was changed to *Pass*.
  - **Unspecified**: Show rules with an *Unspecified* disposition.



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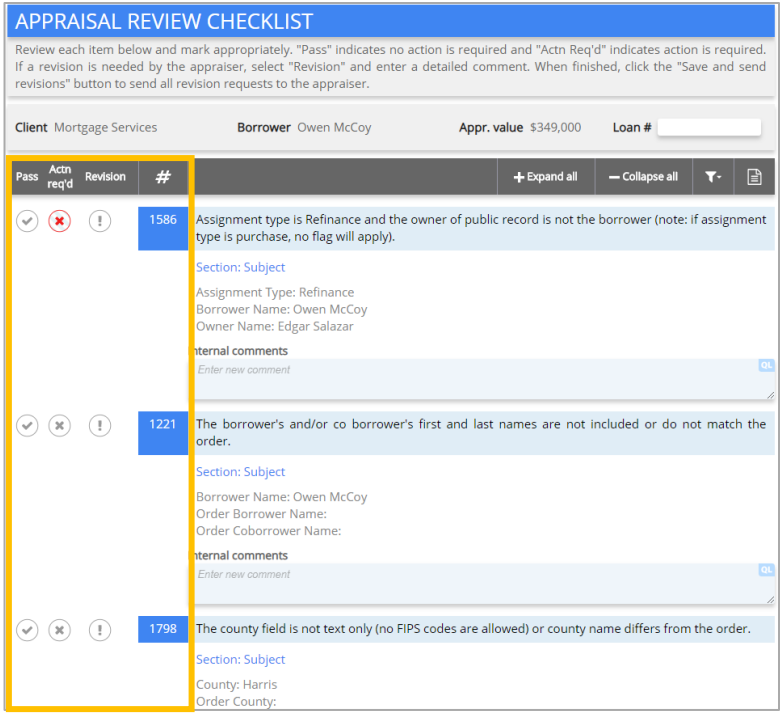
Appraisal Review Checklist (continued)

Understanding rule dispositions

- There are four rule dispositions:
  - **Pass**: No issues were detected so you do not need to act.
  - **Action Required**: An issue was detected and needs your attention.
  - **Revision**: Rules that require attention by the appraiser. You will set a rule to this disposition once you determine an issue needs to be addressed.
  - **Unspecified**: If a rule is manual then you will always set the disposition yourself. If a rule is marked as *Unspecified*, that indicates an issue could not be determined. This will require you to manually set the disposition.
- Auto-pass of rules based on prior reviews
  - Your account can be configured in a way that, if you're reviewing multiple iterations of an appraisal, setting a manual rule as *Pass* during one review results in it automatically passing in subsequent reviews. Contact us at 1-800-900-4954 to update your account settings.
  - Your account can also be configured to automatically pass automated rules if you set a rule as *Pass* in a prior review. This will apply if the supporting details for the rule have not changed. Contact us at 1-800-900-4954to update your account settings.



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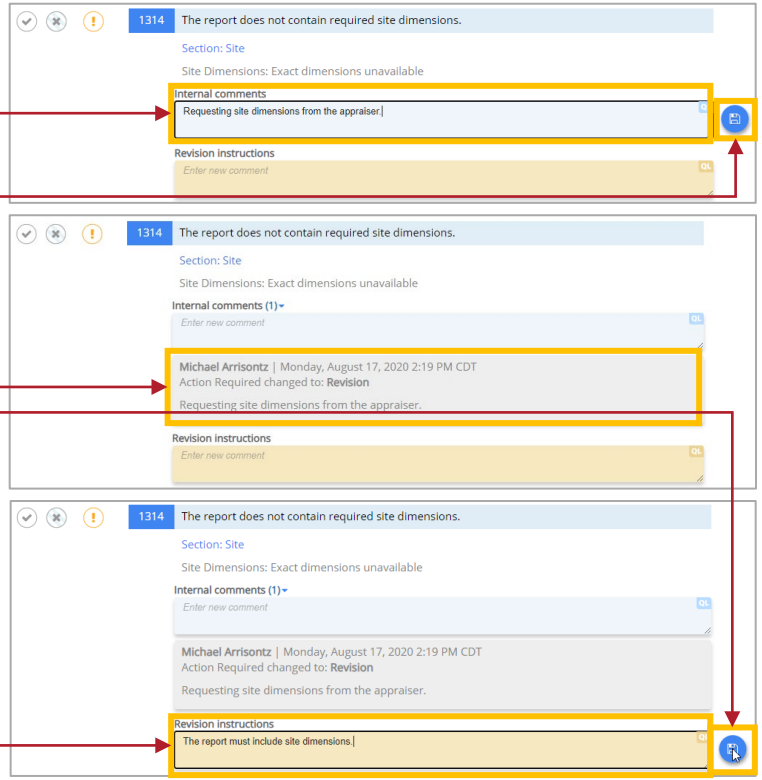
Appraisal Review Checklist (continued)

Internal vs External comments

- You can choose to enter an internal comment for any rule in your QC checklist. To do so, type your comment in the *Internal comments* field and click the **save icon** next to the field or click the **Save My Work button** at the top of the RealView report.
  - Once your comment has been saved, it will appear below the comment field and is part of the order's audit trail.
- If you set a rule as *Revision*, you can enter an appraiser-facing comment by typing your comment in the *Revision instructions* field. Then, click the **save icon** next to the field or click the **Save My Work button** at the top of the RealView report.



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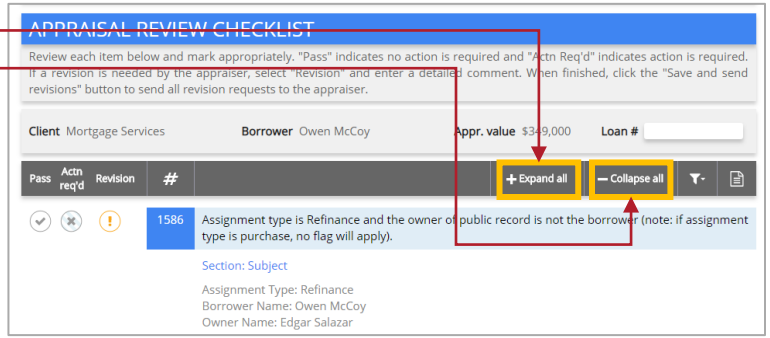
Appraisal Review Checklist (continued)

Expand and collapse comments

You can click the **Expand all button** at the top of the checklist to show all comments or the **Collapse all button** to collapse all comments. This does not hide rules from the PDF, revision requests, or checklist summary.



View comments from prior reviews

If you review multiple iterations of an appraisal and would like view internal comments from a prior review, we can configure your account this way. Contact us at 1-800-900-4954 to update your account settings.

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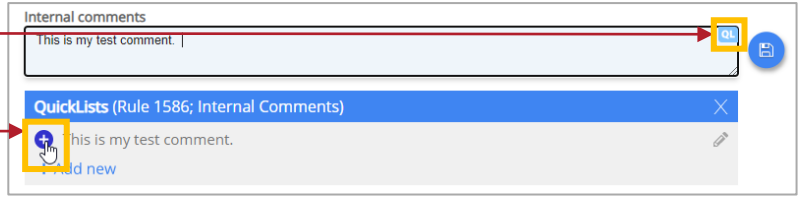
Appraisal Review Checklist (continued)

QuickLists

- QuickLists are pre-configured comments that can be used to add commonly used phrases or sentences in revision requests to the appraiser or in internal comments. Each rule can have its own set of these “canned” comments. Quicklists greatly reduce miscommunication and back and forth between vendor and reviewer.
  - These are pre-set by your Account Admin. Reviewers can also make changes to QuickLists if your account is configured to allow it.

Using QuickLists

- QuickLists can be accessed by clicking the **QL button** in the upper right corner of a comment field.
- Click the **plus icon** next to any QuickList item to the text to the comment field.



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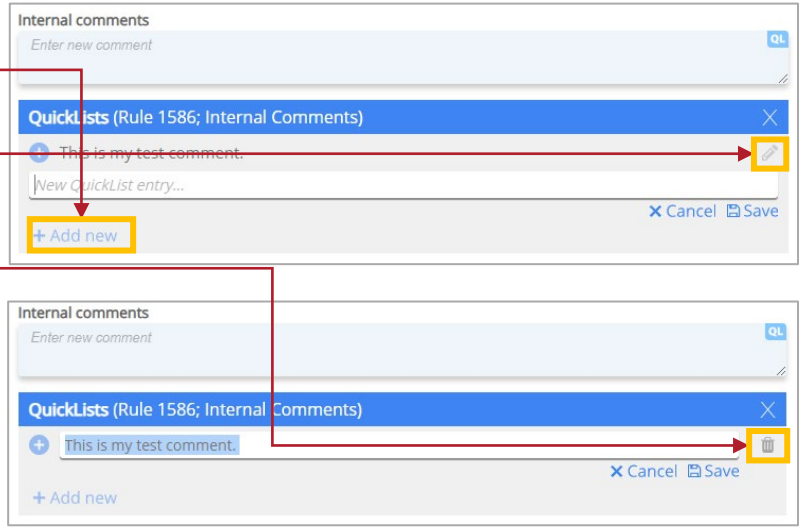
Appraisal Review Checklist (continued)

Managing QuickLists

- A new QuickList item can be added by clicking **add new**.
- An existing QuickList item can be modified by clicking the **pencil icon** next to the QuickList item.
- An existing QuickList item can be deleted by clicking the **pencil icon** next to the Quicklist item and then clicking the **trashcan icon**.



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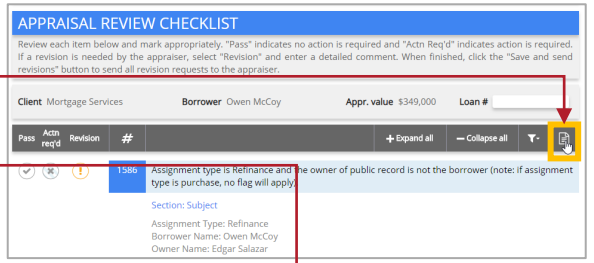
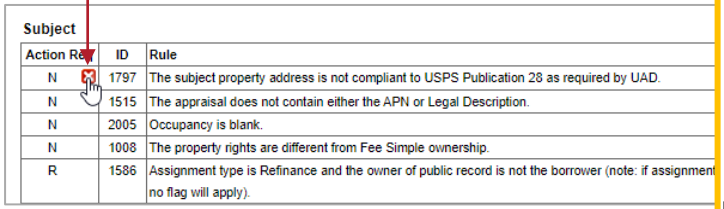
Appraisal Review Checklist (continued)

Checklist summary

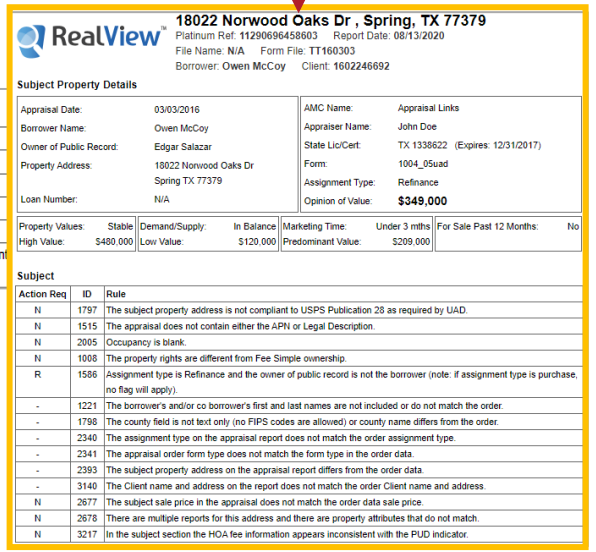
- Click the **document icon** at the top of your checklist to view a summary of rules set as *Passed*, *Action Required*, and *Revision*.
- To clear a rule from the checklist summary, hover over the rule's disposition and click the **x icon**. If you launch the checklist summary again then the rule will re-appear.





Subject

Action Req	ID	Rule
N	1797	The subject property address is not compliant to USPS Publication 28 as required by UAD.
N	1515	The appraisal does not contain either the APN or Legal Description.
N	2005	Occupancy is blank.
N	1008	The property rights are different from Fee Simple ownership.
R	1586	Assignment type is Refinance and the owner of public record is not the borrower (note: if assignment no flag will apply).



RealView™

18022 Norwood Oaks Dr , Spring, TX 77379

Platinum Ref: 11290696458603 Report Date: 08/13/2020
File Name: N/A Form File: TT160303
Borrower: Owen McCoy Client: 1602246692

Subject Property Details

Appraisal Date:	03/03/2016	AMC Name:	Appraisal Links
Borrower Name:	Owen McCoy	Appraiser Name:	John Doe
Owner of Public Record:	Edgar Salazar	State Lic/Cert:	TX 1338622 (Expires: 12/31/2017)
Property Address:	18022 Norwood Oaks Dr Spring TX 77379	Form:	1004_05uad
		Assignment Type:	Refinance
Loan Number:	N/A	Opinion of Value:	**$349,000**

Property Values:	Stable	Demand/Supply:	In Balance	Marketing Time:	Under 3 mths	For Sale Past 12 Months:	No
High Value:	$480,000	Low Value:	$120,000	Predominant Value:	$209,000		

Subject

Action Req	ID	Rule
N	1797	The subject property address is not compliant to USPS Publication 28 as required by UAD.
N	1515	The appraisal does not contain either the APN or Legal Description.
N	2005	Occupancy is blank.
N	1008	The property rights are different from Fee Simple ownership.
R	1586	Assignment type is Refinance and the owner of public record is not the borrower (note: if assignment type is purchase, no flag will apply).
-	1221	The borrower's and/or co borrower's first and last names are not included or do not match the order.
-	1798	The county field is not text only (no FIPS codes are allowed) or county name differs from the order.
-	2340	The assignment type on the appraisal report does not match the order assignment type.
-	2341	The appraisal order form type does not match the form type in the order data.
-	2393	The subject property address on the appraisal report differs from the order data.
-	3140	The Client name and address on the report does not match the order Client name and address.
N	2677	The subject sale price in the appraisal does not match the order data sale price.
N	2678	There are multiple reports for this address and there are property attributes that do not match.
N	3217	In the subject section the HOA fee information appears inconsistent with the PUD indicator.

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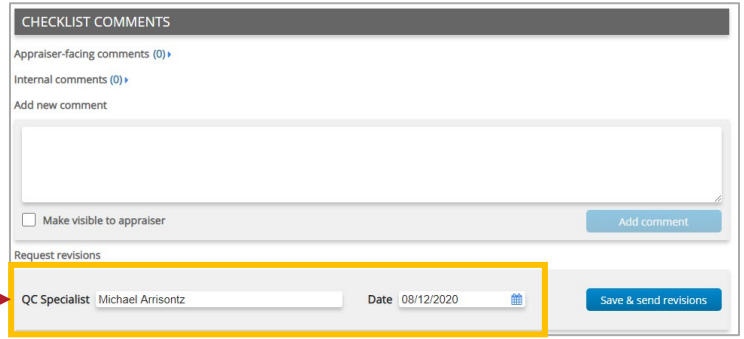
Appraisal Review Checklist (continued)

Finalizing your review

- If you are finished reviewing the appraisal, enter your name and date at the bottom of your checklist.



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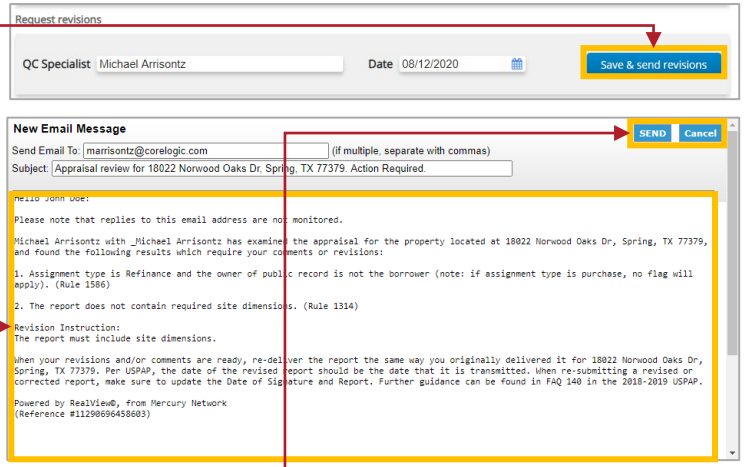
Appraisal Review Checklist (continued)

Sending revision requests

- Click the **Save and send revisions** button to send all checklist items marked as *Revision* and any external comments entered throughout the RealView report. You will then be shown a revision request window containing the message that will be sent via email to the appraiser.
- All revision items will appear in a numbered list within the *New Email Message* dialog.
  - If you prefer for rule IDs to be hidden, then we can configure your account this way.
  - We can also configure your account to show the rule description or only your revision instruction. Contact us at 1-800-900-4954 to update your account settings.
- Within the revision request message, you can change your revision message by typing directly into the field, if you choose to.
- When finished editing the message, click **Send** to send the revisions to the appraiser via email. Otherwise, click **Cancel** to exit.



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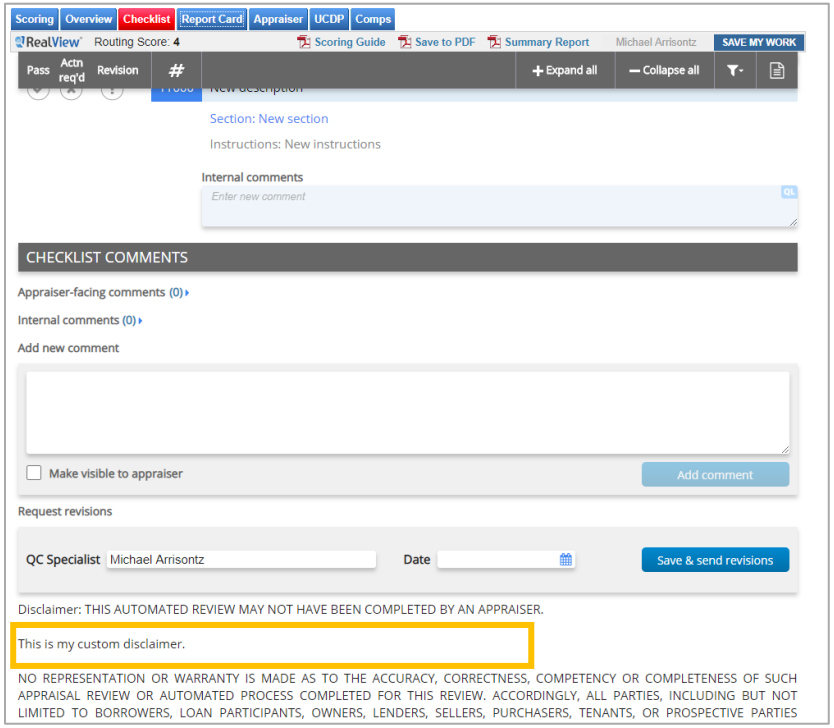
Appraisal Review Checklist (continued)

Including a custom disclaimer

- If you want a custom disclaimer to be shown within the RealView report and in the revision request email that is sent to appraisers, then contact us at 1-800-900-4954 to update your account settings.
- Custom disclaimers can be up to 15,000 characters long.



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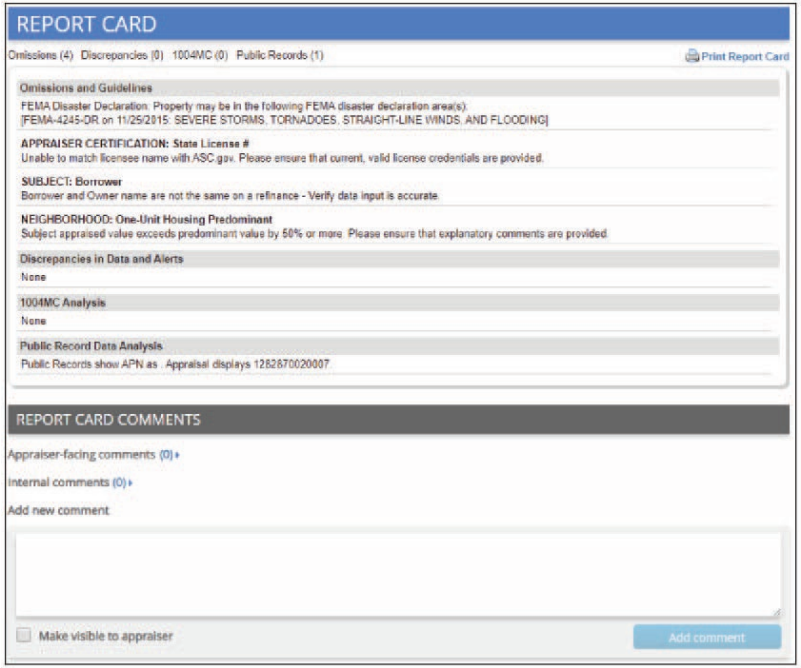
Report Card

Report Card

- The report card section displays omissions and guidelines. You will also be able to see public record discrepancies and completeness issues.
- Some findings in the *Report Card* may overlap with those on the scoring tab and checklist section, but it is helpful as a second set of eyes when reviewing.



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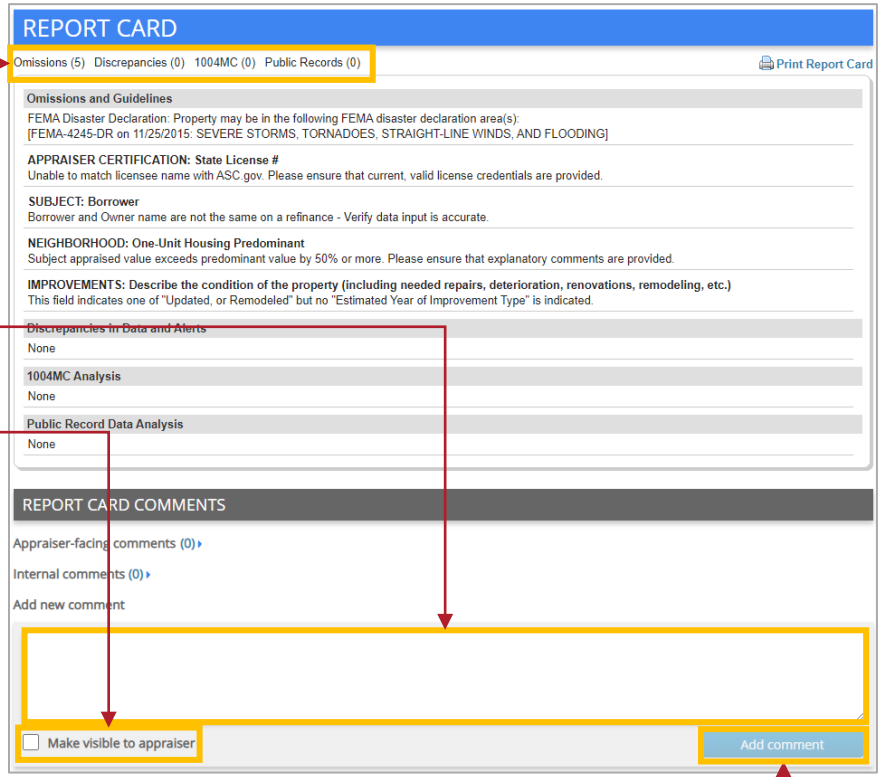
Report Card (continued)

View the findings counts

- A count for each type of finding is shown above the findings.

Sending a report card finding as a revision request

1. If you want to send a report card finding as a revision to the appraiser, then copy the finding into the report card comment box below, then customize it if you like.
2. Check **Make visible to appraiser** to make it appraiser-facing. Otherwise, it will only show internally to reviewers.
3. Click **Add Comment** to save your comment.
4. All revision items, including appraiser-facing comments, will be sent to the appraiser once you click **Save and send revisions** from within the Checklist section.



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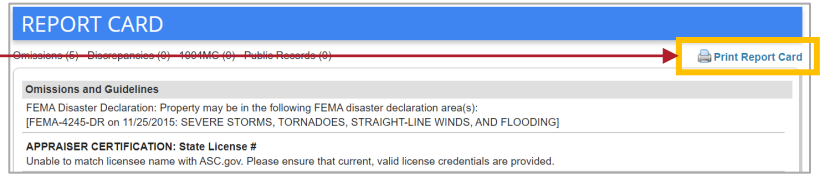
Report Card (continued)

Save a copy of the report card findings

- Click the **Print Report Card** link to download a copy of the report card findings in PDF format.



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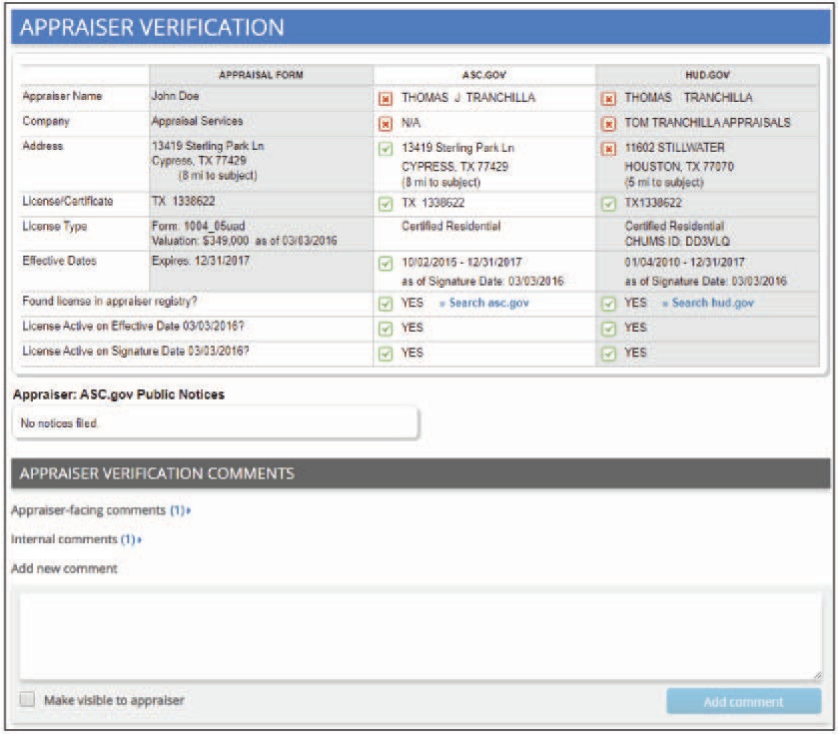
Appraiser Verification

- We check the appraiser's info against ASC.gov and HUD.gov daily and will highlight any discrepancies in data.
- This section will show any public notices about the appraiser (for example is the license active or inactive and has it been revoked.)
- The three key questions are answered here:
  - Is the appraiser's license in the appraiser registry?
  - Was the license active on the effective date of the appraisal?
  - Was the license active on the signature date?



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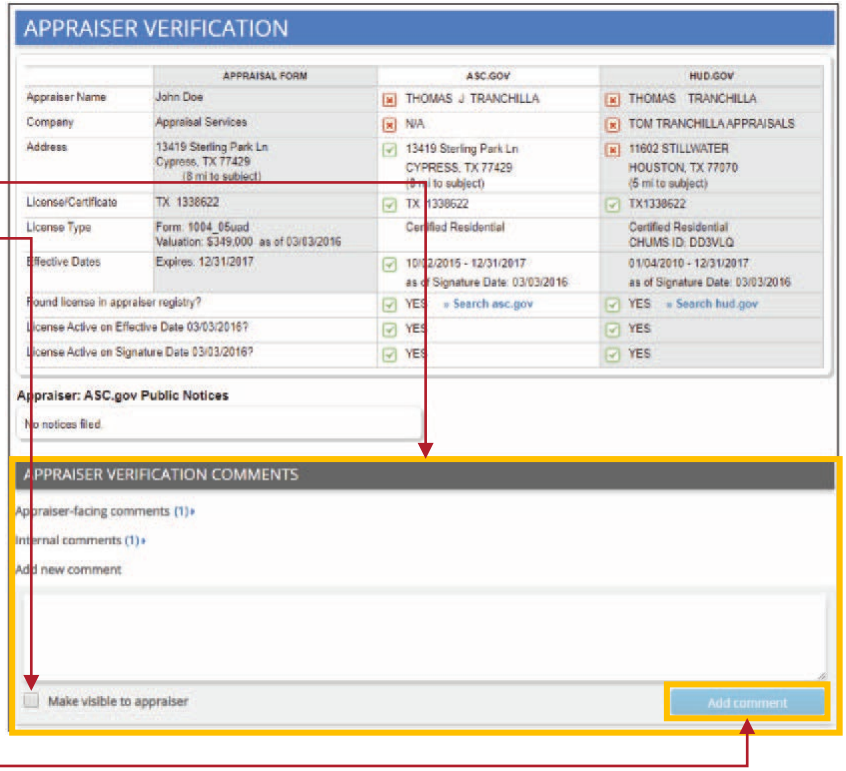
Appraiser Verification (continued)

Notifying the appraiser of a license discrepancy

1. If you want to notify the appraiser of a license discrepancy, type a message in the *Appraiser Verification Comments* box.
2. Check **Make visible to appraiser** to make the message appraiser-facing. Otherwise, it will only show internally to reviewers.
3. Click **Add Comment** to save your comment.
4. All revision items, including appraiser-facing comments, will be sent to the appraiser once you click **Save and send revisions** within the *Checklist* section.



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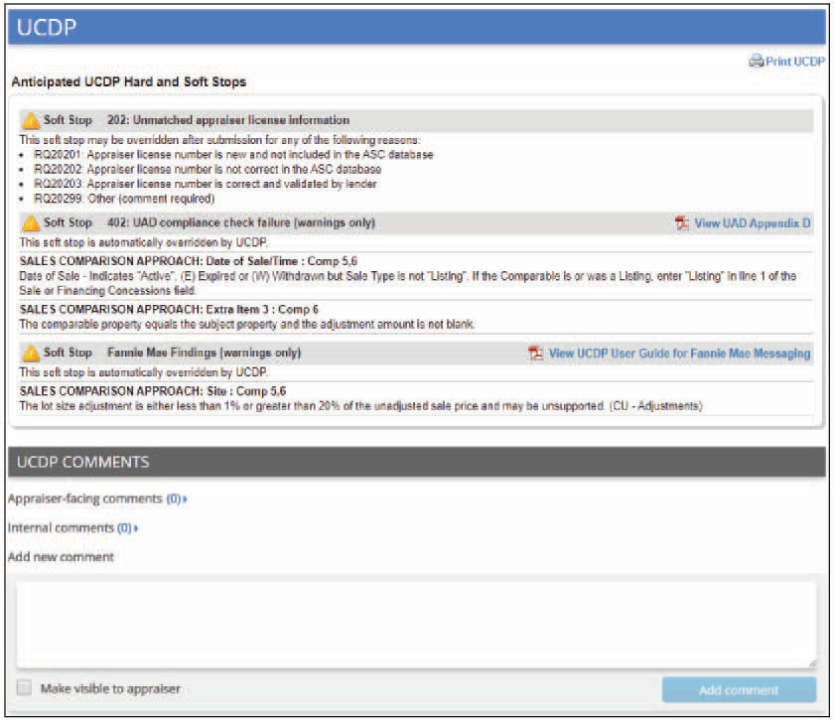
UCDP/EAD

- In the *UCDP/EAD* section you will find a list of anticipated hard stops to help eliminate issues before submission.
- If you have already submitted to Freddie Mac or Fannie Mae upon completion, you can skip over this section because you already have that info available based on the portal's response.



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UCDP/EAD (continued)

Save a copy of the UCDP/EAD findings

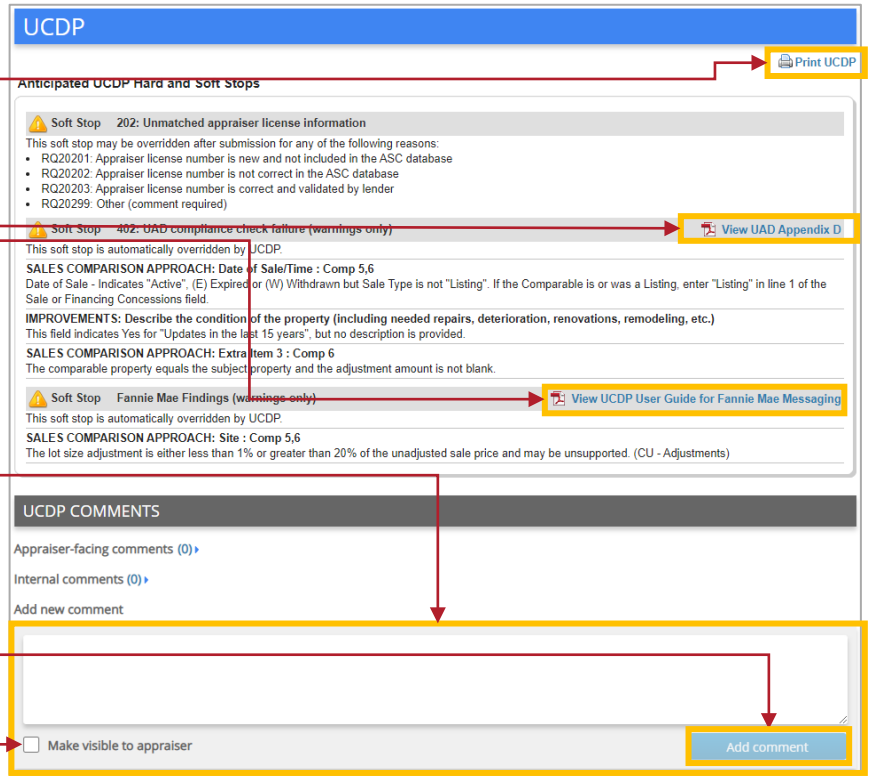
- Click **Print UCDP** or **Print EAD** to download a copy of the UCDP or EAD findings in PDF format.

View supporting compliance documents

- Click the *View UAD Appendix D* and *View UCDP User Guide for Fannie Mae Messaging* links to view supporting compliance documentation.

Sending a UCDP or EAD finding as a revision request

1. If you want to send a UCDP or EAD finding as a revision to the appraiser, then copy the finding into the UCDP/EAD comment box below. You can customize the revision request verbiage if you choose.
2. Check **Make visible to appraiser** to make it appraiser-facing. Otherwise, it will only show internally to reviewers.
3. Click **Add Comment** to save your comment.
4. All revision items, including appraiser-facing comments, will be sent to the appraiser once you click **Save and send revisions** from within the Checklist section.



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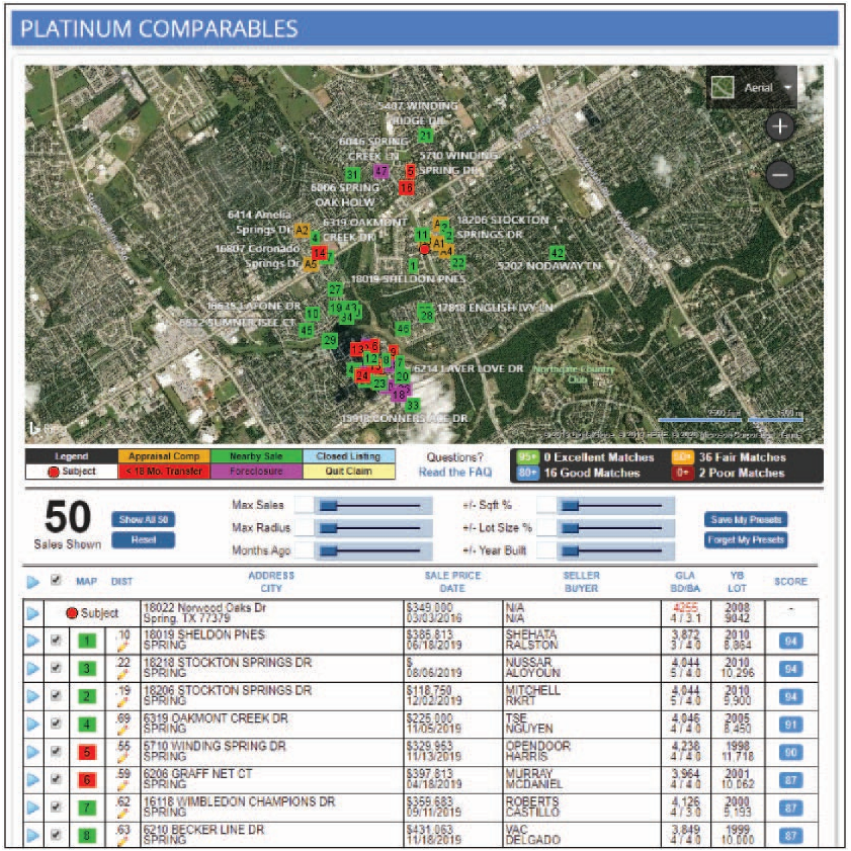
Comparable Analysis

- The *Platinum Comparables* tab will provide you with a number of additional comps from public record and MLS data. This is available if your account is enabled with our data package.
- This map is interactive. You can zoom in and out as necessary to get an idea of the neighborhood and additional views available. The subject property is the red circle. You can hover over any of the icons to see the address, bed and bath count, living area, lot size and year built.
- For standard RealView, you can see that the appraiser's comps are in gold. They are also listed below on the grid. If you need to see any additional information about the comps, you can click on blue arrow. The comps are listed in order of similarity score on the right hand side. The similarity score is an internal score based on 15 characteristics from the sales grid.



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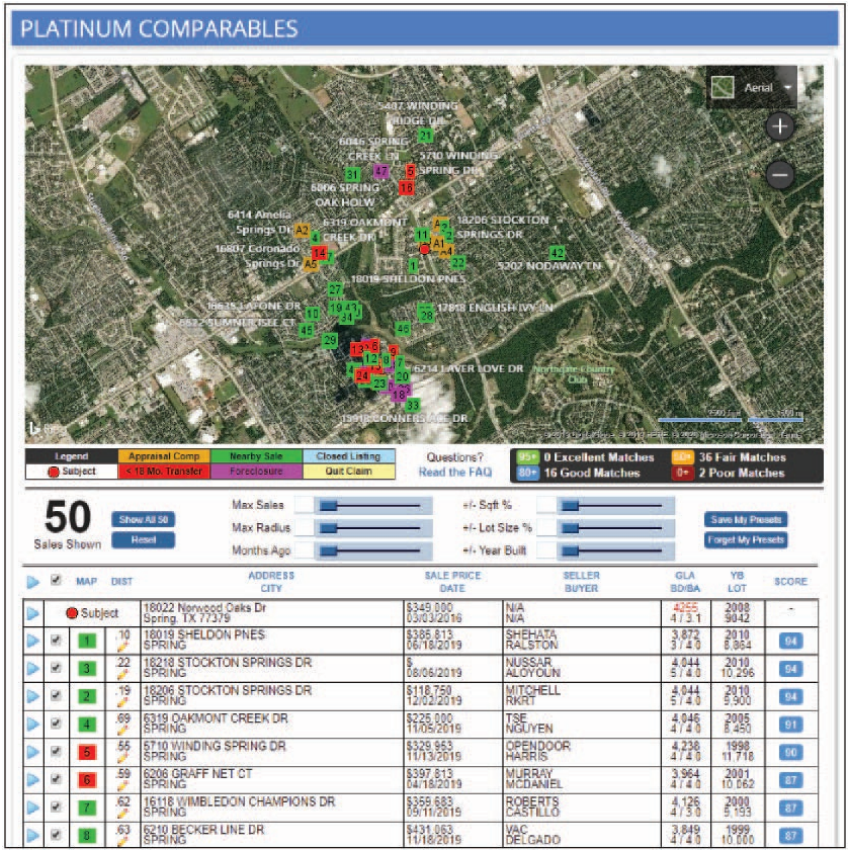
Comparable Analysis (continued)

- For RealView Platinum orders, you will see that the legend below the map.
  - Comparable sales included in the appraisal are gold.
  - Nearby sales are green. These are sales that have closed and are recorded in public records.
  - Closed listings, or MLS data are blue. These comps have closed in the MLS, but may not have been recorded at the county level.
  - Properties that have transferred more than once in the last 18 months (flips) are red.
  - Foreclosures are purple.
  - Quit claims are light yellow.



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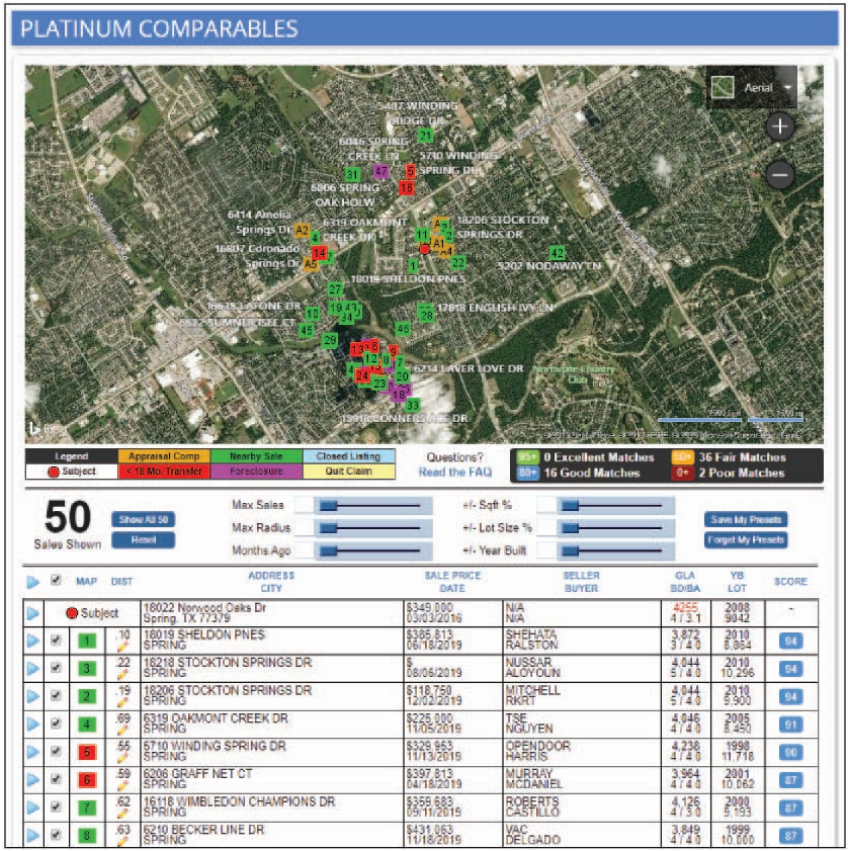
Comparable Analysis (continued)

- You'll see in Sales Shown that we only show you the comps that score as well or better than the appraiser's comps with our similarity on the right. The similarity score is an internal score based on 15 characteristics from the sales grid. If you would like to see any additional info from public record and MLS data, you can click on the blue arrow.
- Clicking the arrow will allow you to see items such as bed and bath, sales price, GLA etc.
- Anything in red will show you that there is a discrepancy between the appraiser's data and public record data.



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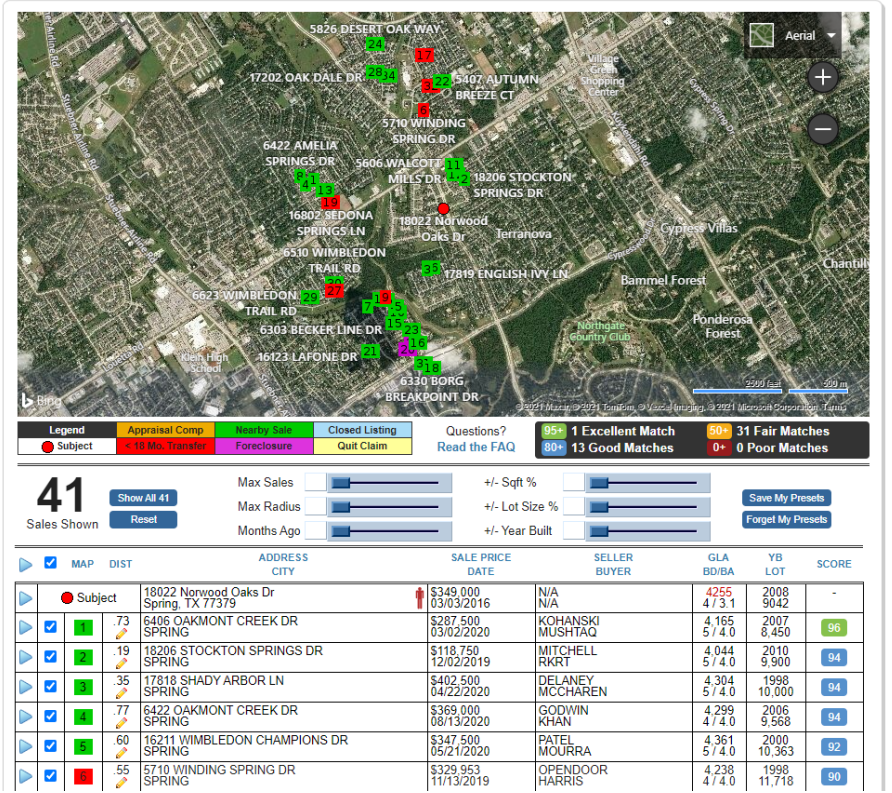
Comparable Analysis (continued)

- You have the ability to ask an appraiser for more info about a comp by clicking on the pencil, which drags the address to the comment box.
- If ever you see a red person in the grid, it means we have multiple appraisals in our system for the property. This feature is called my property data base and will allow you to see any discrepancies between the appraiser's data and peer data based on 15 characteristics on the sales grid.
  - The blue person represents peer data for this property.
  - The green person shows previous data provided by this appraiser for this property.
  - The red person is showing this appraiser's data for this report.



	MAP	DIST	ADDRESS CITY	SALE PRICE DATE	SELLER BUYER	GLA BD/BA	YB LOT	SCORE
	Subject		18022 Norwood Oaks Dr Spring, TX 77379	$349,000 03/03/2016	N/A N/A	4255 4 / 3.1	2008 9042	-
	1	.73	6406 OAKMONT CREEK DR SPRING	$287,500 03/02/2020	KOHANSKI MUSHTAQ	4,165 5 / 4.0	2007 8,450	96
	2	.19	18206 STOCKTON SPRINGS DR SPRING	$118,750 12/02/2019	MITCHELL RKRT	4,044 5 / 4.0	2010 9,900	94
	3	.35	17818 SHADY ARBOR LN SPRING	$402,500 04/22/2020	DELANEY MCCHAREN	4,304 5 / 4.0	1998 10,000	94
	4	.77	6422 OAKMONT CREEK DR SPRING	$369,000 08/13/2020	GODWIN KHAN	4,299 4 / 4.0	2006 9,568	94
	5	.60	16211 WIMBLEDON CHAMPIONS DR SPRING	$347,500 05/21/2020	PATEL MOURRA	4,361 5 / 4.0	2000 10,363	92
	6	.55	5710 WINDING SPRING DR SPRING	$329,953 11/13/2019	OPENDOOR HARRIS	4,238 4 / 4.0	1998 11,718	90

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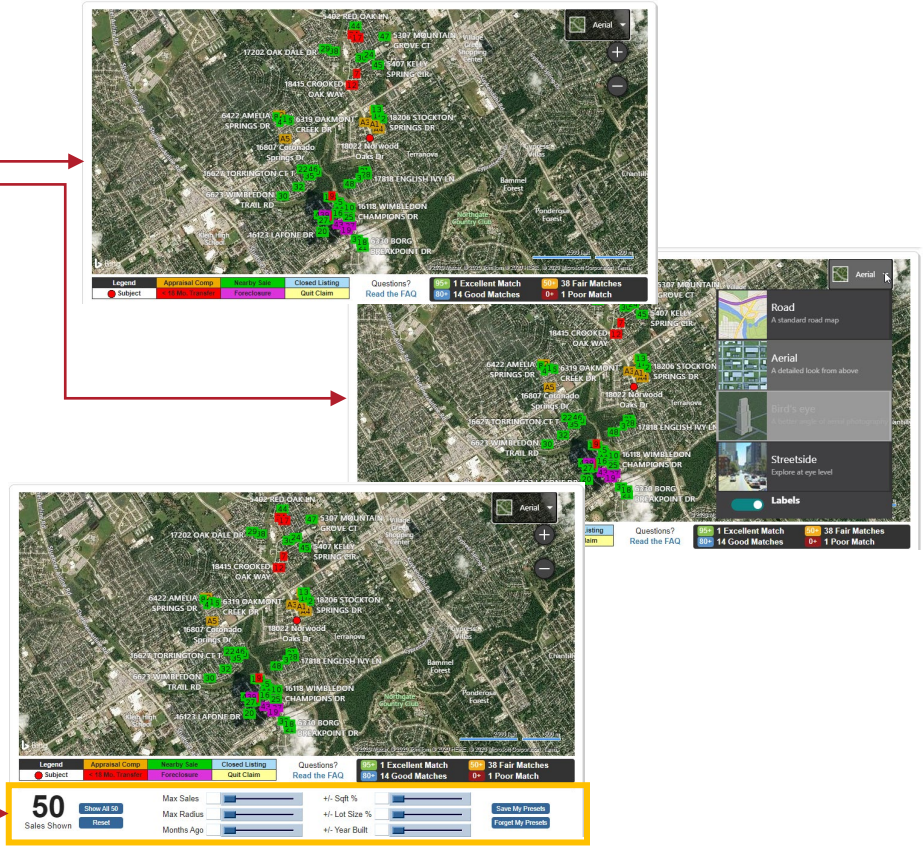
Comparable Analysis (continued)

Using the map

- You will see multiple properties plotted on the map. You can use the map controls to change your zoom and view. The legend below the map indicates what the color coding represents, including Subject Property, Appraisal Comparable, Nearby Sale, Closed Listing, < 18 Months Transfer, Foreclosure, and Quit Claim. You can hover over a property located on the map to see more details about the property.

Using the map's filters

- There are several filters below the map that you can use to drill down to the properties you need, including Max Sales, Max Radius, Months Ago, Square Feet %, Lot Size %, and Year Built. You can enter a value for a filter or move the lever.
- Once you have set the filters as desired you can save those preferences by clicking the **Save My Presets button**, which will be applied to your future RealView orders. Click **Forget My Presets** to stop saving those preferences.
- To clear any filters, click the **Reset button** to the left of the filters.



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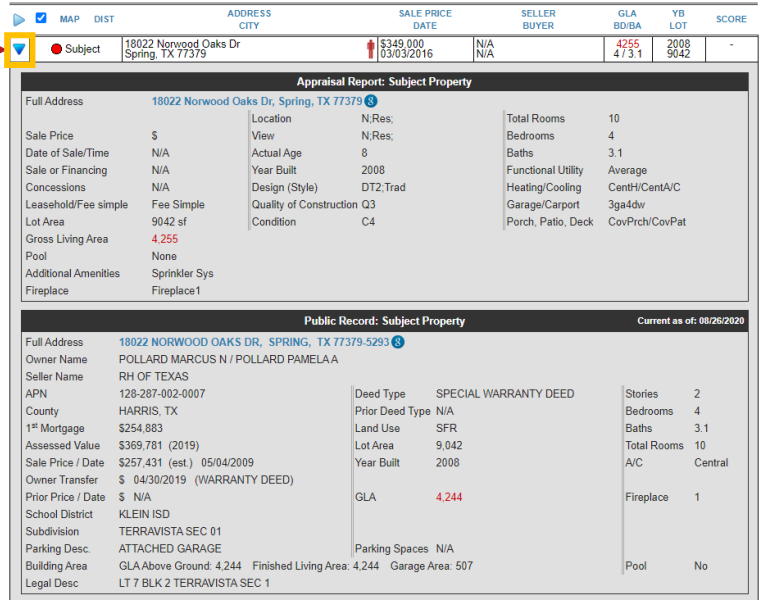
Comparable Analysis (continued)

Drilling down to more details on a property

- You can drill down to more information regarding a property by clicking the **blue arrow icon** at the beginning of a record. Appraisal report and public record data will be shown for the subject property. Any discrepancies between the appraisal report and public record data will be shown in red.



MAP	DIST	ADDRESS CITY	SALE PRICE DATE	SELLER BUYER	GLA BD/BA	YB LOT	SCORE
	Subject	18022 Norwood Oaks Dr Spring, TX 77379	$349,000 03/03/2016	N/A N/A	4255 4 / 3.1	2008 9042	-

Appraisal Report: Subject Property

Full Address	18022 Norwood Oaks Dr, Spring, TX 77379				
Sale Price	$	Location	N;Res;	Total Rooms	10
Date of Sale/Time	N/A	View	N;Res;	Bedrooms	4
Sale or Financing	N/A	Actual Age	8	Baths	3.1
Concessions	N/A	Year Built	2008	Functional Utility	Average
Leasehold/Fee simple	Fee Simple	Design (Style)	DT2;Trad	Heating/Cooling	CentH/CentA/C
Lot Area	9042 sf	Quality of Construction	Q3	Garage/Carport	3ga4dw
Gross Living Area	4,255	Condition	C4	Porch, Patio, Deck	CovPrch/CovPat
Pool	None				
Additional Amenities	Sprinkler Sys				
Fireplace	Fireplace1				

Public Record: Subject Property Current as of: 08/26/2020

Full Address	18022 NORWOOD OAKS DR, SPRING, TX 77379-5293				
Owner Name	POLLARD MARCUS N / POLLARD PAMELA A				
Seller Name	RH OF TEXAS				
APN	128-287-002-0007	Deed Type	SPECIAL WARRANTY DEED	Stories	2
County	HARRIS, TX	Prior Deed Type	N/A	Bedrooms	4
1st Mortgage	$254,883	Land Use	SFR	Baths	3.1
Assessed Value	$369,781 (2019)	Lot Area	9,042	Total Rooms	10
Sale Price / Date	$257,431 (est.) 05/04/2009	Year Built	2008	A/C	Central
Owner Transfer	$ 04/30/2019 (WARRANTY DEED)				
Prior Price / Date	$ N/A	GLA	4,244	Fireplace	1
School District	KLEIN ISD				
Subdivision	TERRAVISTA SEC 01				
Parking Desc.	ATTACHED GARAGE	Parking Spaces	N/A		
Building Area	GLA Above Ground: 4,244 Finished Living Area: 4,244 Garage Area: 507			Pool	No
Legal Desc	LT 7 BLK 2 TERRAVISTA SEC 1				

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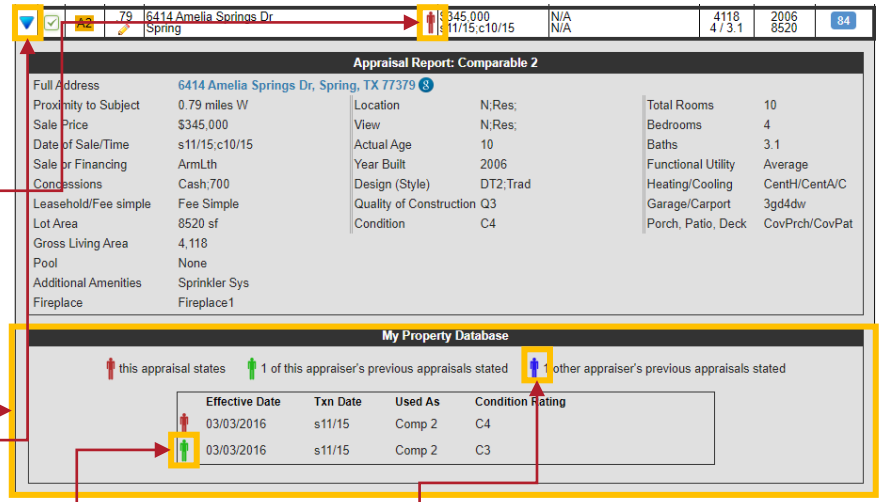
Comparable Analysis (continued)

Viewing *My Property Database* findings

- You may see an **icon of a person** for a particular record. This icon indicates RealView has identified a piece of information in the current appraisal report that differs from what another appraiser previously captured for the property. By drilling down on the property (clicking the **blue arrow icon**), you will see details regarding the discrepancy.



Green Icon - This means that your appraiser has used this property in one of their previous reports, and the data provided previously differs from what they're providing today.

Blue Icon – This means that your vendor's opinions are not in line with those of his/her peers. May need to find out why there are inconsistencies.

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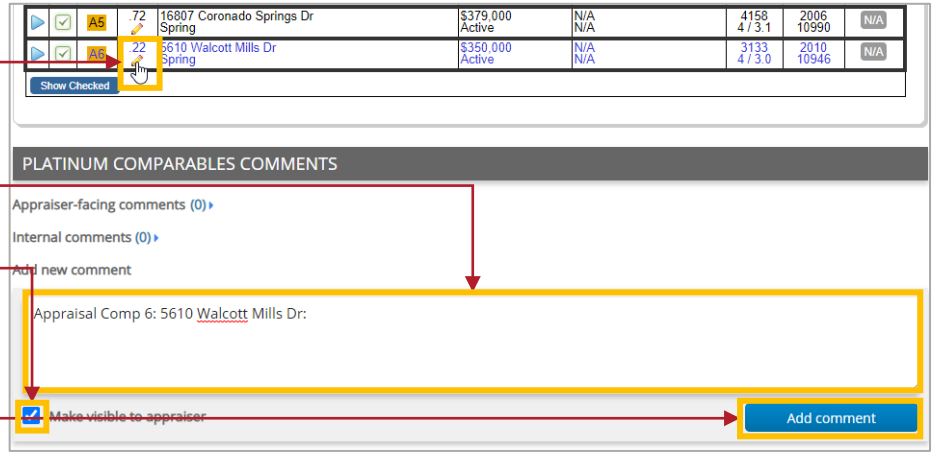
Comparable Analysis (continued)

Sending a comparable finding as a revision request

1. If you want to send a comparable finding as a revision to the appraiser, then click the **pencil icon** next to a property shown in the grid. The property address will appear in the comment field below. You can customize the message if you choose.
2. Check **Make visible to appraiser** to make the comment appraiser facing. Otherwise, it will only show internally to reviewers.
3. Click **Add Comment** to save your comment.
4. All revision items, including appraiser-facing comments, will be sent to the appraiser once you click **Save and send revisions** from within the Checklist section.



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Supported Forms

RealView Supported Forms and Addendums

Form Name	Fannie Mae Form Number	Freddie Mac Form Number	Comments
Uniform Residential Appraisal Report UAD	Form 1004	Form 70	
Individual Condominium Unit Appraisal Report UAD	Form 1073	Form 465	
Exterior-Only Inspection Individual Condominium Unit Appraisal Report UAD *(aka "Drive By" Condominium Inspection)*	Form 1075	Form 466	
Exterior-Only Inspection Residential Appraisal Report UAD *(aka "Drive By" One-Unit Property Inspection)*	Form 2055	Form 2055	
Uniform Residential Appraisal Report non-UAD	Form 1004 (non-UAD)	Form 70 (non-UAD)	Translation fee may apply for this form type
Individual Condominium Unit Appraisal Report non-UAD	Form 1073 (non-UAD)	Form 465 (non-UAD)	Translation fee may apply for this form type

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Supported Forms

RealView Supported Forms and Addendums (continued)

Form Name	Fannie Mae Form Number	Freddie Mac Form Number	Comments
Exterior-Only Inspection Individual Condominium Unit Appraisal Report non-UAD	Form 1075 (non-UAD)	Form 466 (non-UAD)	Translation fee may apply for this form type
Exterior-Only Inspection Residential Appraisal Report non-UAD	Form 2055 (non-UAD)	Freddie Mac Form 2055 (non-UAD)	Translation fee may apply for this form type
Manufactured Home Appraisal Report non-UAD	Form 1004C (non-UAD)	Form 70B (non-UAD)	Translation fee may apply for this form type
Small Residential Income Property Appraisal Report non-UAD	Form 1025 (non-UAD)	Form 72 (non-UAD)	Translation fee may apply for this form type
Individual Cooperative Interest Appraisal Report non-UAD	Form 2090 (non-UAD)	--	Translation fee may apply for this form type
Exterior-Only Inspection Individual Cooperative Interest Appraisal Report non-UAD	Form 2095 (non-UAD)	--	Translation fee may apply for this form type
Market Conditions Addendum	Form 1004MC	Form 71	

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Supported Forms

RealView Bridge Supported Forms and Addendums

Form Name	Fannie Mae Form Number	Freddie Mac Form Number	Comments
Uniform Residential Appraisal Report UAD	Form 1004	Form 70	
Individual Condominium Unit Appraisal Report UAD	Form 1073	Form 465	
Exterior-Only Inspection Individual Condominium Unit Appraisal Report UAD *(aka "Drive By" Condominium Inspection)*	Form 1075	Form 466	
Exterior-Only Inspection Residential Appraisal Report UAD *(aka "Drive By" One-Unit Property Inspection)*	Form 2055	Form 2055	

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Supported File Types

Supported File Types

- RealView
  - MISMO 2.6 or higher
  - ENV files
  - PDF files (Translation fee may apply for this file type)
- RealView Bridge
  - MISMO 2.6

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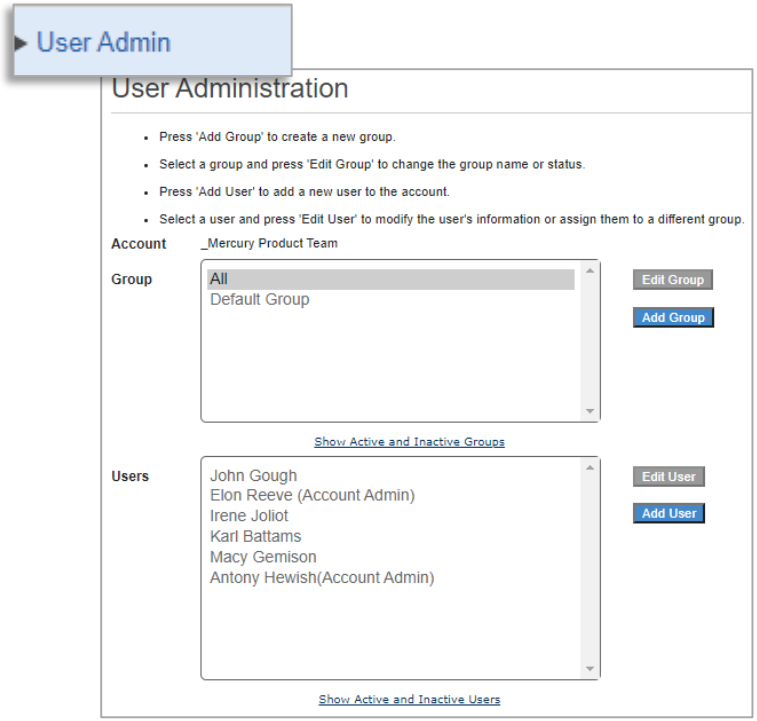
Account Admin Guide

RealView User Administration

The *User Administration* page allows Account Administrators to view and manage all users within the account. To access this page, click on the “User Admin” option in the gray menu box.



User Roles

- **User** – Users can place orders and retrieve reports ordered within their own user profiles. They do not have access to orders placed under another person’s user profile.
- **Manager** – Account managers can place orders and retrieve reports and can also view other users’ reports placed within their company accounts. Managers can add and remove users via the “User Admin” option.
- **Account Admin** – Account Administrators can order reports, view every order within their company accounts, add and remove users, pull invoices and run reports. They can also create and modify RealView checklists as well as common responses for each checklist.

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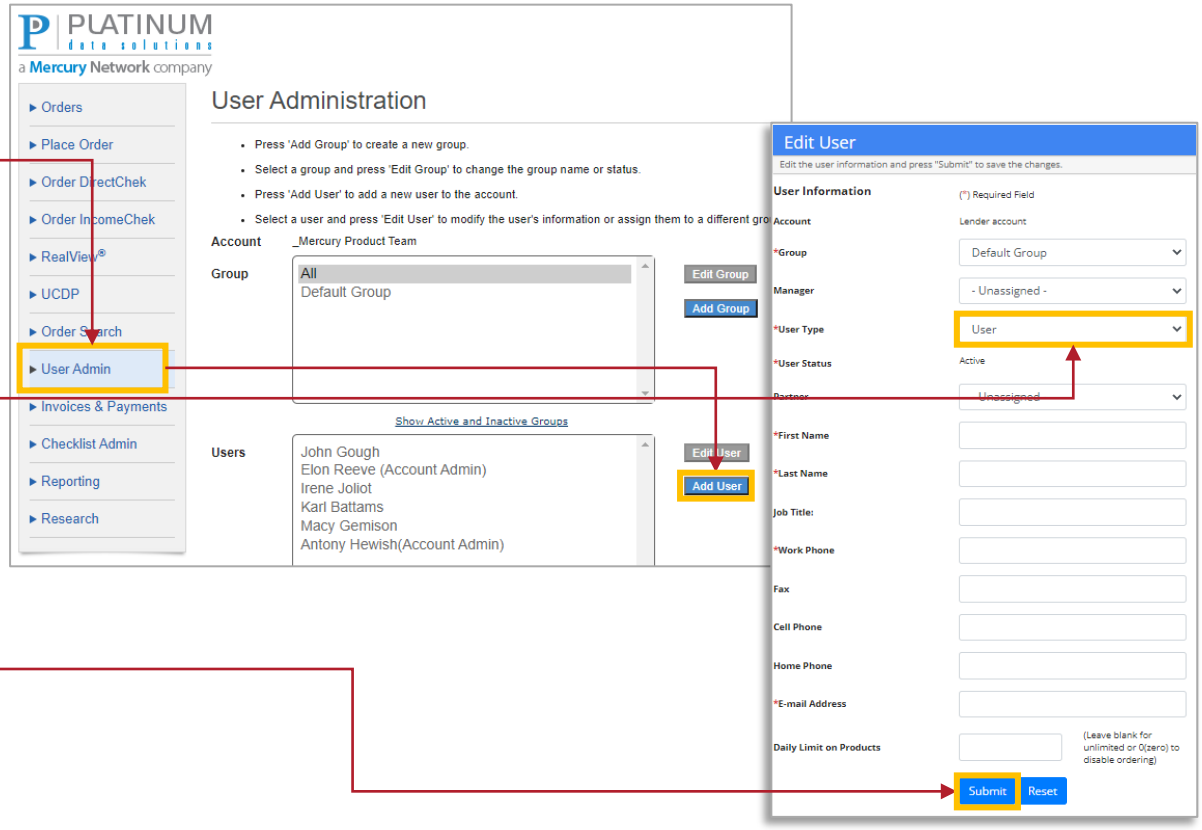
RealView User Administration (continued)

To add a new user:

- On the *User Admininstration* page, click on the **Add User** button.
- On the next page, choose the level of access in the *User Type* drop-down menu (*User*, *Manager* or *Account Admin*) and enter the new user's name, phone number, email address, and other details.
- Click **Submit**.

The new user will receive an automated email containing their user credentials from ndr.VSG@corelogic.com.



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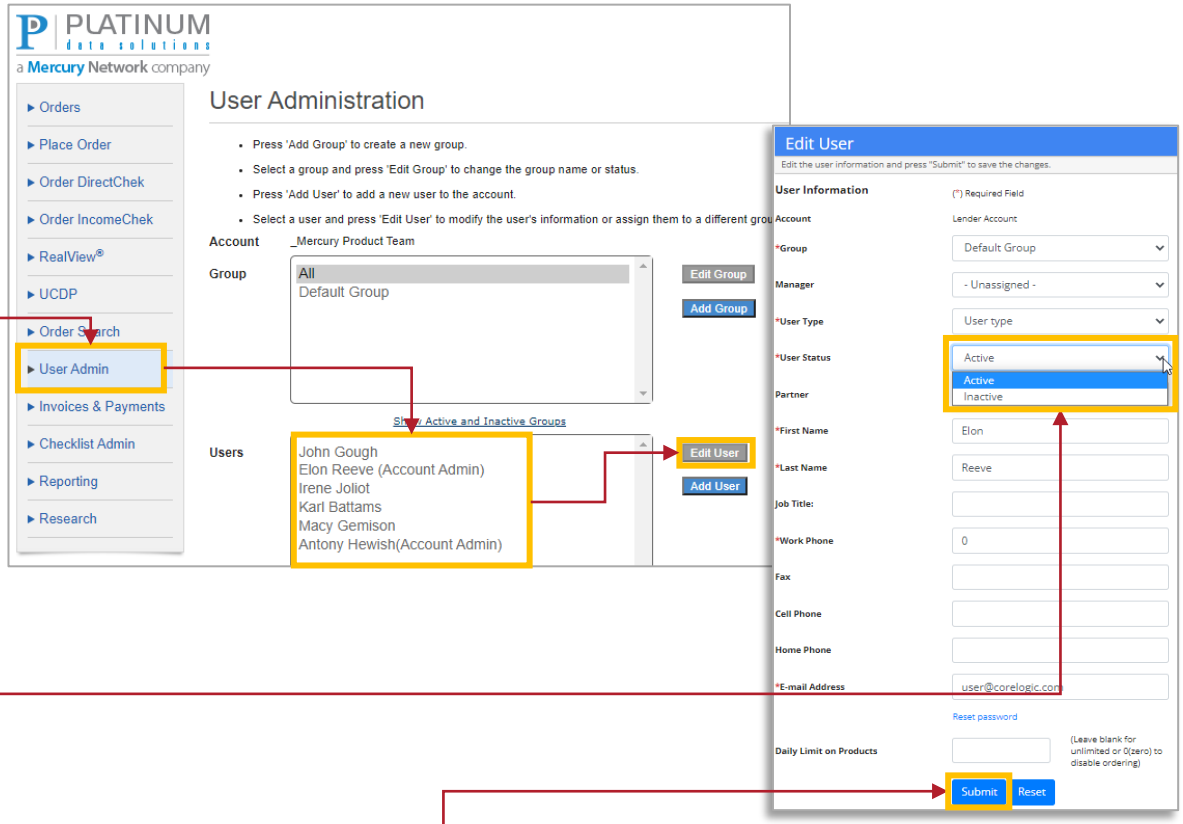
RealView User Administration (continued)

Adding, removing, and managing users

To update existing users within the account:

- On the *User Administration* page, select a user and click on the **Edit User** button.
- On the *Edit User* page, use the fields to enter or edit the user's information.
  - If you want to activate or deactivate a user, select **Active** or **Inactive** in the *User Status* dropdown box.
- When complete, click **Submit**.



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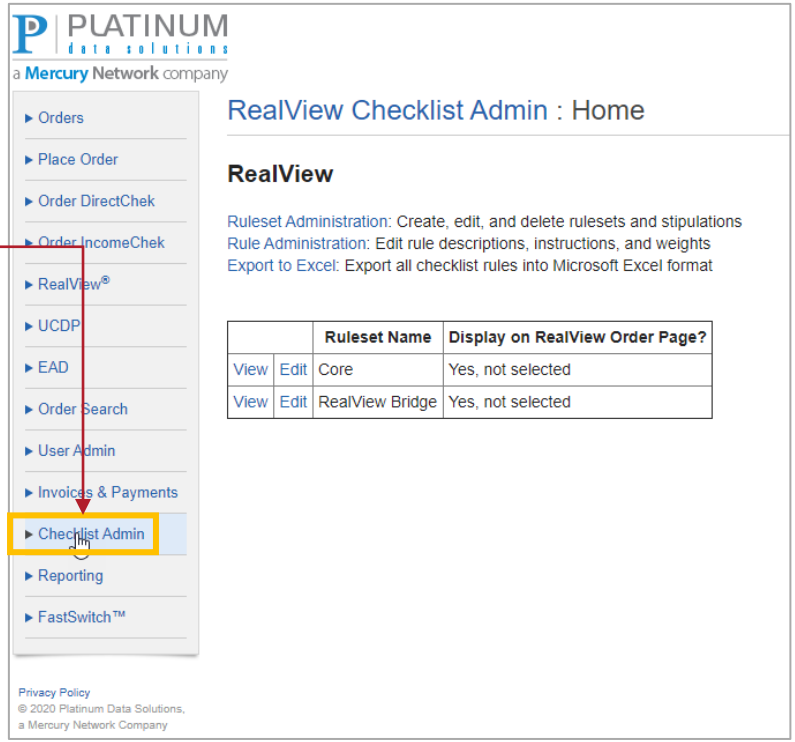
RealView Checklist Admin: Home

Accessing the *Checklist Admin*

- Log in to the QVP site (platdata.com) using your Account Admin credentials.
- Navigate to **Checklist Admin** in the site navigation.
- From here, you can access your QC checklist and rulesets, as well as download your rules in an Excel spreadsheet.



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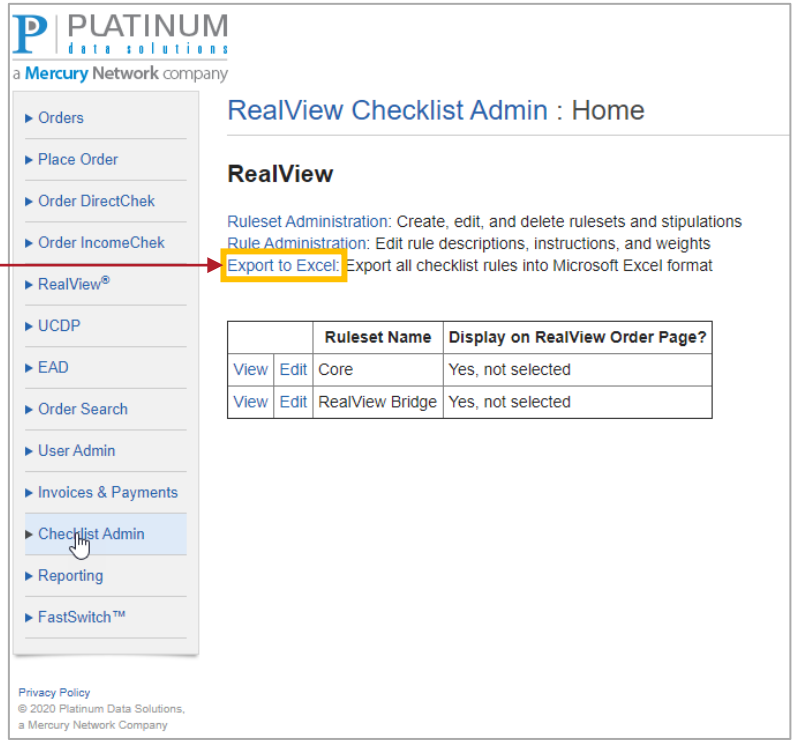
RealView Checklist Admin: Home

Download a copy your QC checklist and rulesets

- Click the **Export to Excel** link on the *RealView Checklist Admin: Home* page.



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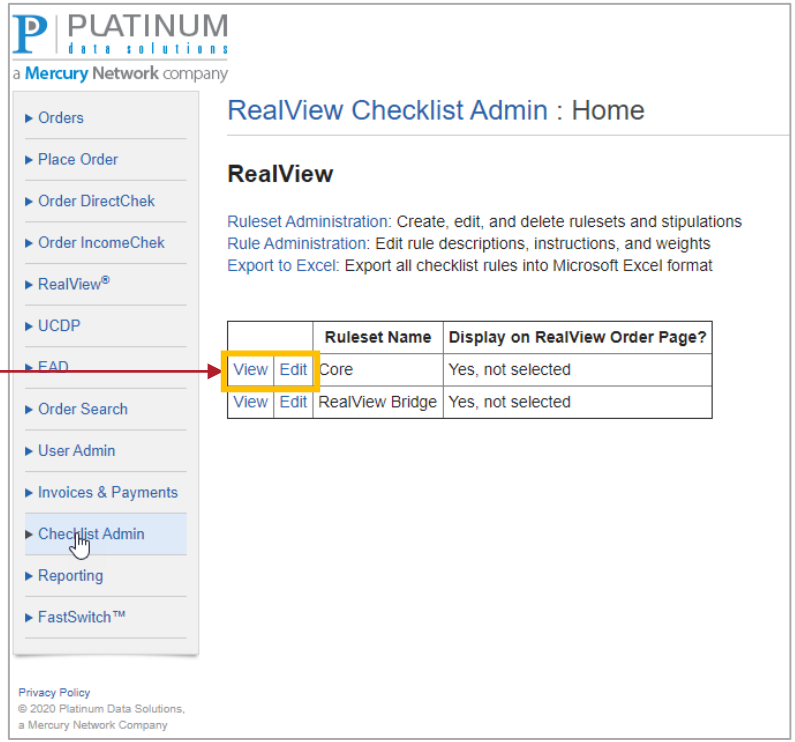
RealView Checklist Admin: Home (continued)

View your rulesets

- A list of your rulesets appear on the *RealView Checklist Admin: Home* page. To quickly access a single ruleset, click the **View** or **Edit link** next to the ruleset name.



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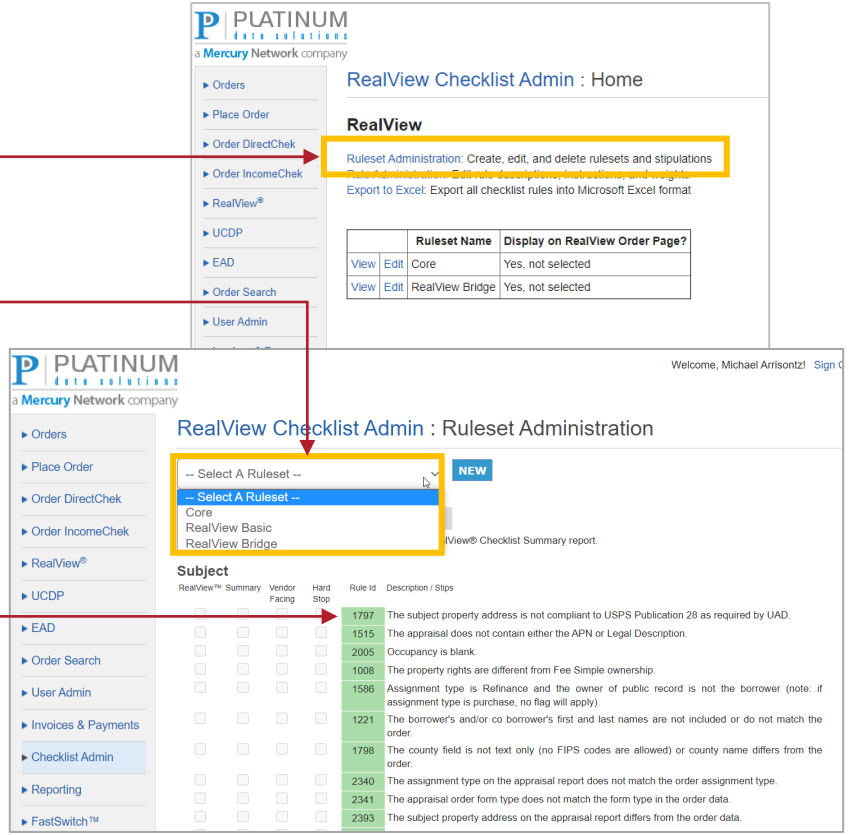
RealView Checklist Admin: Home (continued)

View your rulesets

- To access all your rulesets, click **Ruleset Administration** and select a ruleset from the dropdown list on the *RealView Checklist Admin: Ruleset Administration* page.
- A rule ID with a green background indicates the rule is automated. Otherwise, a gray background indicates it is a manual rule.



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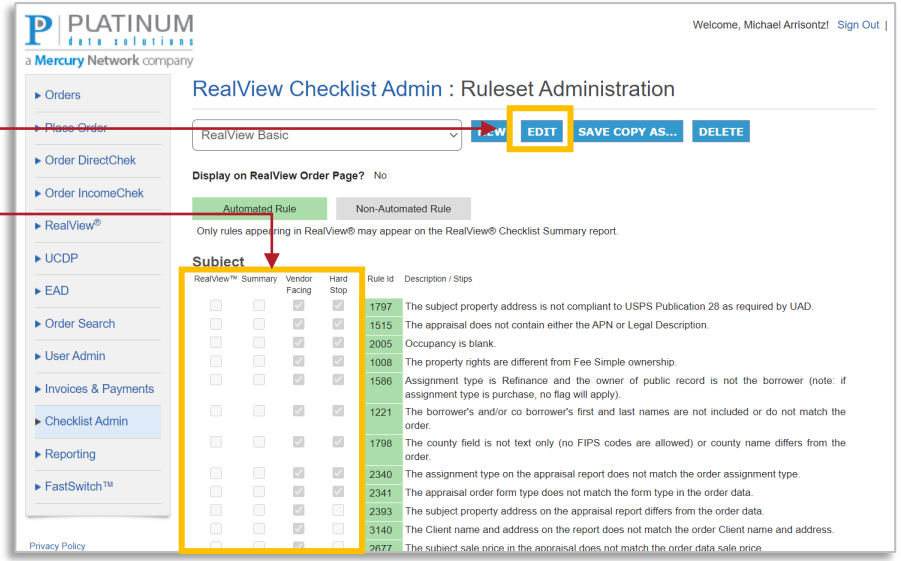
RealView Checklist Admin: Ruleset Administration

Modify an existing ruleset

- Once you've selected a ruleset on the *RealView Checklist Admin: Ruleset Administration* page, click the **Edit button** next to the ruleset name.
- Once in edit mode, the checkboxes that appear next to rules in the list can be enabled/disabled. Rule options means:
  - **RealView:** When enabled, the rule appears in the RealView report.
  - **Summary:** When enabled, the rule appears in the RealView checklist summary.
  - **Vendor Facing:** When enabled, the rule is made appraiser-facing if it is an automated rule. Manual rules cannot be appraiser-facing.
  - **Hard Stop:** When enabled, the appraiser-facing rule is treated as a hard stop, which requires the appraiser to either correct the report or override the rule and enter a comment justifying their decision to leave the report as-is (hard stop treatment depends on how your account is configured). Appraiser comments appear within the RealView report.



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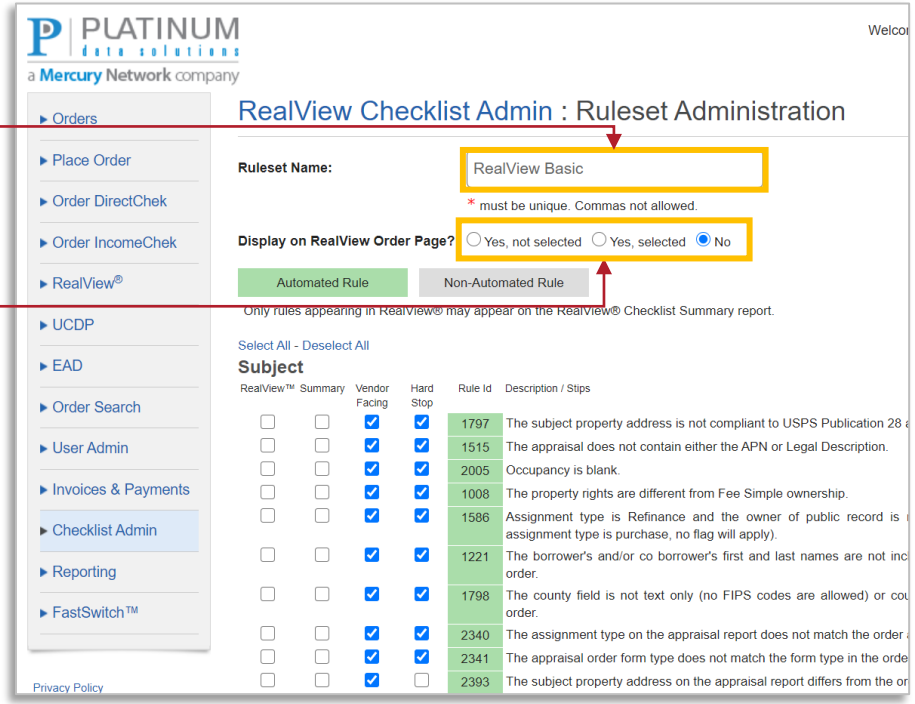
RealView Checklist Admin: Ruleset Administration

Modify an existing ruleset (continued)

- The ruleset name can be modified by typing in the *Ruleset Name* field.
- The *Display on RealView Order Page* option allows you to determine whether a ruleset appears on the RealView order page and whether it is selected for use by default.
- When finished making changes, click **Save**.



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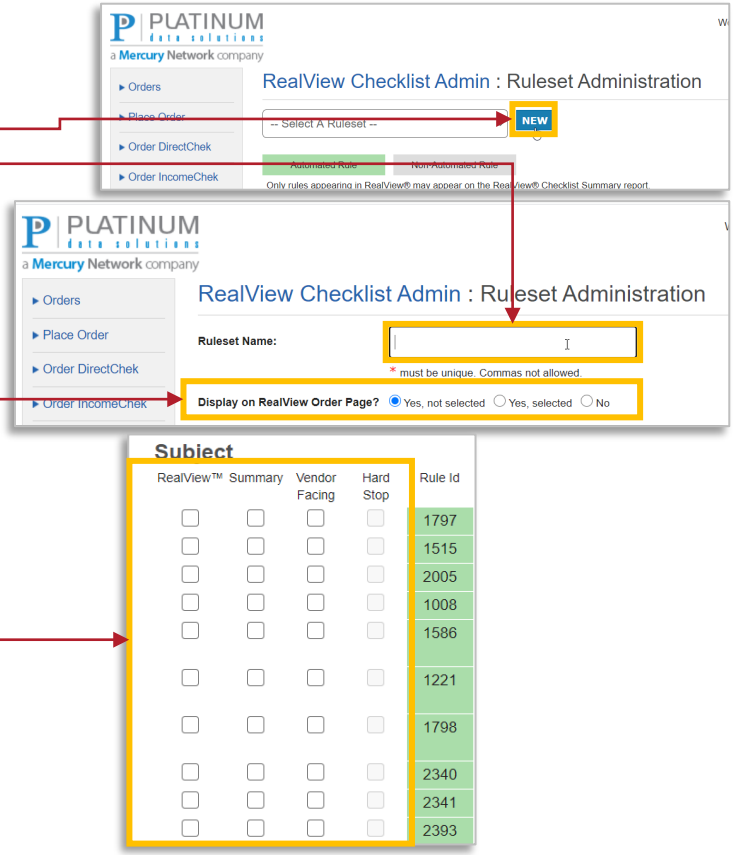
RealView Checklist Admin: Ruleset Administration

Create a new ruleset

- Once you've navigated to the *RealView Checklist Admin: Ruleset Administration* page, click the **New button**.
- Enter a ruleset name in the *Ruleset Name* field.
- The *Display on RealView Order Page* option allows you to determine whether a ruleset appears on the RealView order page and whether it is selected for use by default.
- Select which rules you want to apply to your QC process:
  - **RealView**: When enabled, the rule appears in the RealView report.
  - **Summary**: When enabled, the rule appears in the RealView checklist summary.
  - **Vendor Facing**: When enabled, the rule is made appraiser-facing if it is an automated rule. Manual rules cannot be appraiser-facing.
  - **Hard Stop**: When enabled, the appraiser-facing rule is treated as a hard stop, which requires the appraiser to either correct the report or override the rule and enter a comment justifying their decision to leave the report as-is (hard stop treatment depends on how your account is configured). Appraiser comments appear within the RealView report.
- When finished, click **Save**.



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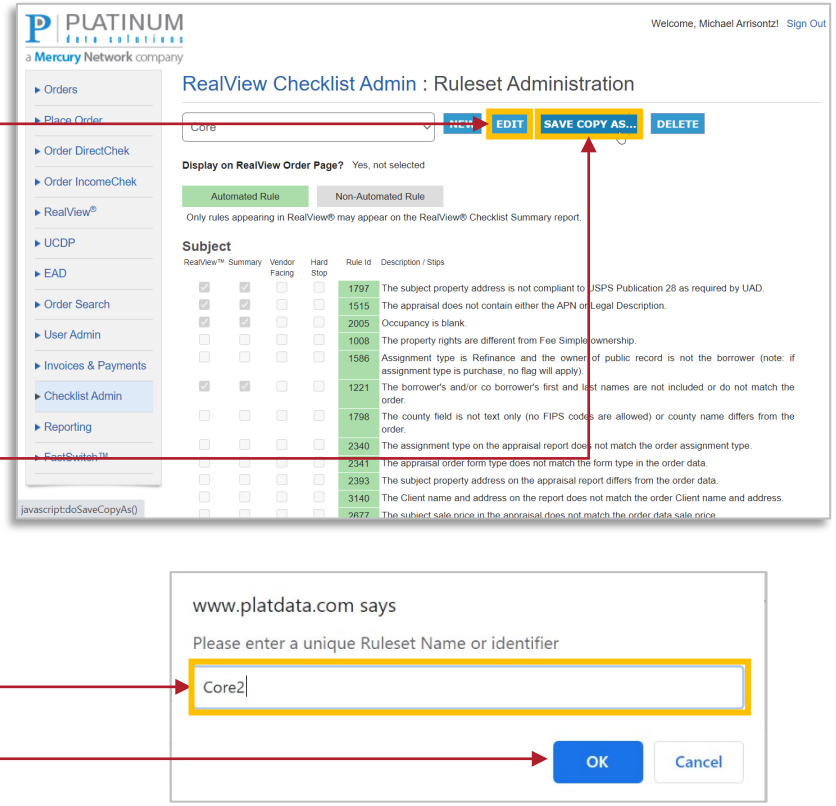
RealView Checklist Admin: Ruleset Administration

Clone an existing ruleset

- You can create a new ruleset by cloning an existing one. This way, the rules carry over to the new ruleset.
- Once you've selected a ruleset on the *RealView Checklist Admin: Ruleset Administration* page, click the **Edit button** next to the ruleset name.
- Next, click the **Save Copy As button**.
- Enter the name of your new ruleset then click **OK**.
- Your new rulest will now appear in the ruleset dropdown list.



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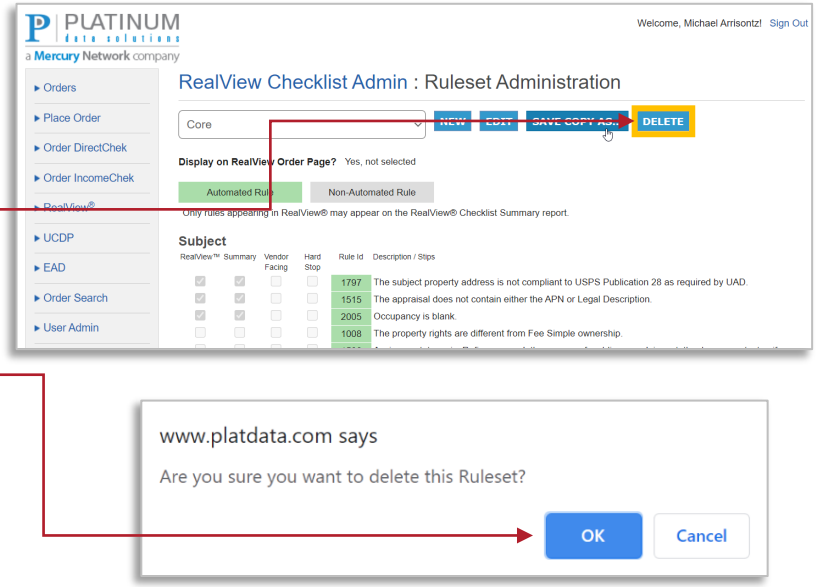
RealView Checklist Admin: Ruleset Administration

Delete existing ruleset

- Once you've selected a ruleset on the *RealView Checklist Admin: Ruleset Administration* page, click the **Delete button** next to the ruleset name.
- Confirm that you want to delete the ruleset by clicking **OK**.
- Once deleted, the ruleset will be removed from the ruleset dropdown list.



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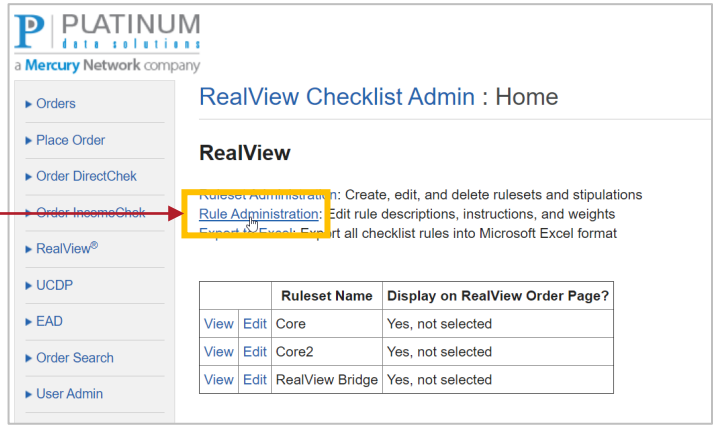
RealView Checklist Admin: Rule Administration

View checklist

- To view your QC checklist, click the **Rule Administration link** on the *RealView Checklist Admin : Home* page.
- Automated rules (the system automatically detects issues) have a green background color and manual rules (the reviewer decides whether there is an issue) have a gray background color.



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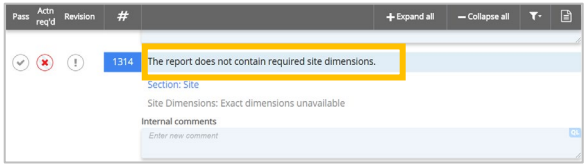
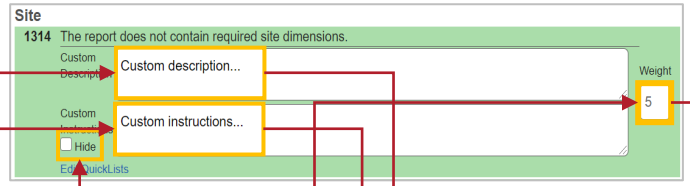
RealView Checklist Admin: Rule Administration

Customize your rules

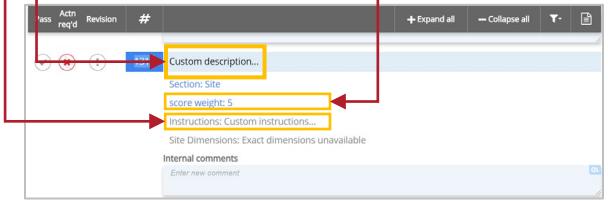
- You can override the default rule language for a rule with your own by entering a description in the *Custom Description* field.
- You can override the default rule instructions for a rule (if any exists) with your own by entering instructions in the *Custom Instructions* field.
- You can disable a rule by enabling the **Hide checkbox** so it isn't used in your QC process.
- Enter a numeric value if you want to weigh the rule when it fires in a RealView report. The sum of all rule weights will appear in the header of the RealView report.
- When finished making changes, click **Save**.

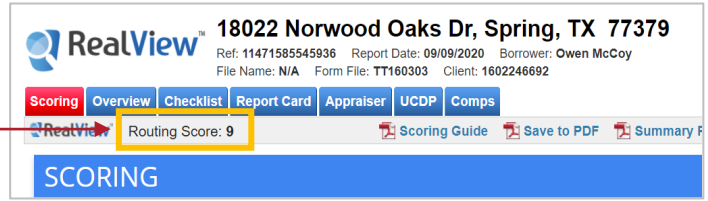
Before rule modification:





After rule modification:





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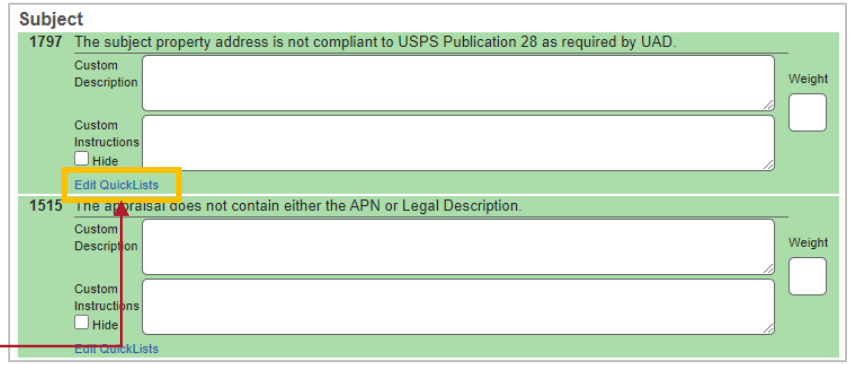
RealView Checklist Admin: Rule Administration

QuickLists

- QuickLists are comprised of pre-configured comments that can be used to request a revision from the appraiser and can be set for each rule in your QC checklist. QuickLists can be set for both internal and external comments.
- These are pre-set by your Account Admin. Reviewers can also make changes to QuickLists within the RealVIew report if your account is configured to allow it.
- QuickLists can be accessed by clicking the **Edit QuickLists** link below a rule.



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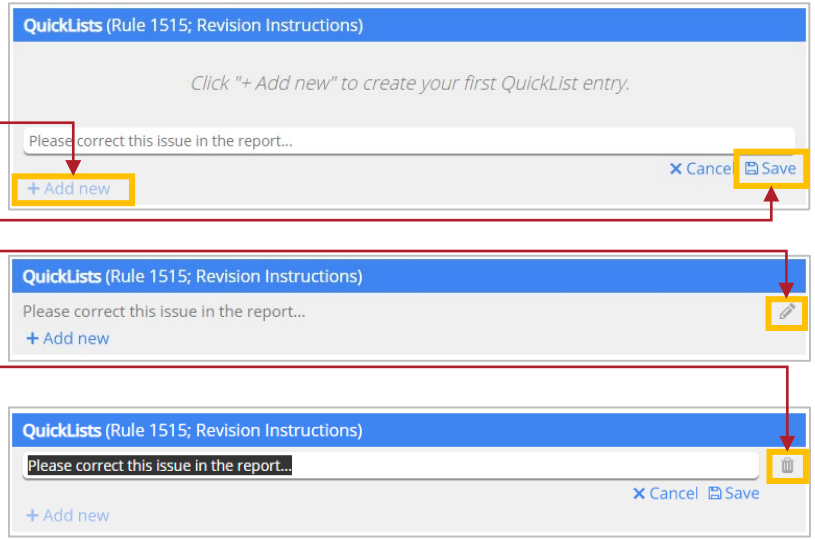
RealView Checklist Admin: Rule Administration

QuickLists (continued)

- A new QuickList item can be added by clicking **add new**. Then, enter the text for the QuickList item and click **Save.**
- An existing QuickList item can be modified by clicking the **pencil icon** next to the QuickList item.
- An existing QuickList item can be deleted by clicking the **pencil icon** next to the Quicklist item and then clicking the **trashcan icon**.



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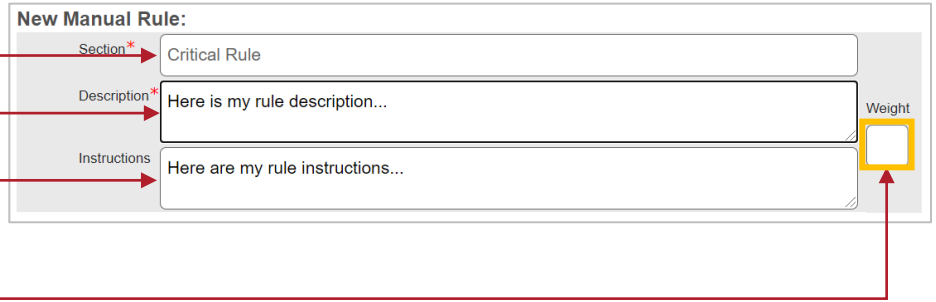
RealView Checklist Admin: Rule Administration

Create a new manual rule

- To view your QC checklist, click the **Rule Administration link** on the *RealView Checklist Admin : Home* page.
- Scroll to the bottom of the checklist and you will see a *New Manual Rule* option.
- Enter the section name (required), description (required), instructions (optional), and weight (optional).
  - **Section name** (required): This is typically the appraisal report section, but you can also use a rule category (e.g. Condo, High Risk). The rule will appear under this section of your checklist.
  - **Description** (required): A description of the rule.
  - **Instructions** (optional): Instructions on how your reviewers should treat the appraisal if there is an issue found.
  - **Weight** (optional): A numeric value _____.
- When finished, click **Save** and the new rule will appear in your checklist.



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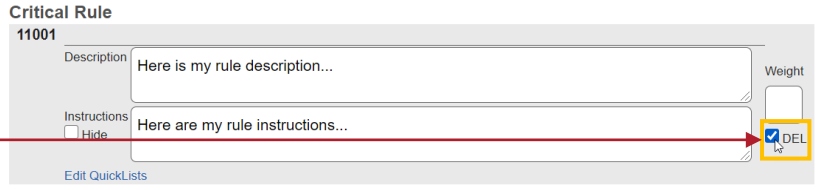
RealView Checklist Admin: Rule Administration

Delete a manual rule that you created

Find the manual rule in your QC checklist that you want to delete.

- Enable the *Delete* checkbox.
- When finished, click **Save**.



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Thank You!