



FLOOD APPRAISAL & VALUATION OWNER & ENCUMBRANCE REPORTS

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Overview

This document covers how to order property ownership, valuation, and appraisal reports thru TitleFlex.

TitleFlex provides the ability to order Flood, Appraisal & Valuation, and Owner & Encumbrance reports. These reports are typically used to establish the value, physical and location characteristic of a property as well as the actual ownership status and existing encumbrances. They can be used in a variety of industries where the need to establish ownership, open liens, value, or characteristics of a given property is required.

Note that these reports typically have a longer turn time as they require a physical inspection of the property or other research after which the report is created manually.

If there is a need for ordering these reports for a number of properties at one time, please see the how-to guide on Batch Ordering documents (TitleFlex Batch Ordering) found on the TitleFlex support site under User Guides.

Different browsers handle the download functionality slightly differently. Make sure you know how your browser manages downloads.

Available Reports

Flood, Appraisal & Valuation and Property Ownership (O&E) products are built using DataTrace's service network and the turn time is dependent upon the property location and product selected. Often they involve actual field inspections of the property as well as additional manual research.

The appropriate personnel will perform the research, create the report, and return it to you via TitleFlex's Order Portal.

Available Reports as of May 2017:

Flood Reports	Appraisal & Valuation	Property Ownership (O&E)
Basic Flood & Census	PACE	O&E – Current Owner
Life of Loan & Census	PACE PRO	O&E – Two Owners
Flex Cert & Census	PACE Elite	Legal & Vesting
	Broker Price Opinion	
	Property Inspection (MAC)	
	Field Review (FNMA 2000)	
	Desktop Review (FNMA 2006)	
	Std Appraisal (FNMA 1004)	
	FHA Appraisal (FNMA 1004)	
	Appraisal Update (FNMA 1004D)	
	Std Appraisal (FNMA 2055)	
	Int Inspection (FNMA 2055)	
	Condo Int (FNMA 1073)	
	Condo Ex (FNMA 1075)	
	Vacant Land Appraisal	
	Operating Income Statement (FNMA 216)	
	Comp Rent Schedule (FNMA 1007)	
	Small Income (FNMA 1025)	

Ordering Reports

Start by locating the subject property in TitleFlex (1). This will allow you to verify that you have the correct address before submitting any order.

From the menu, click on the category headers to display the reports (2) in the Flood, Appraisal & Valuation, and Property Ownership sections.

Check the button (3, 4) next to the report you want to order.

Click the order button (5) to complete your order.

Search By: Address

3036 KILLYBROOKE LN COSTA ME! ✕

Advanced Search

1

2 Flood Reports

- Basic Flood & Census ☆
- Life of Loan & Census ☆
- Flex Cert & Census ☆

3

4

Appraisal & Valuation

- PACE ☆
- PACE Pro ☆
- PACE Elite ☆
- Broker Price Opinion ☆
- Property Inspection (MAC) ☆
- Field Review (FNMA 2000) ☆
- Desktop Review (FNMA 2006) ☆
- Std Appraisal (FNMA 1004) ☆
- FHA Appraisal (FNMA 1004) ☆
- Appraisal Update (FNMA 1004D) ☆
- Std Appraisal (FNMA 2055) ☆
- Int Inspection (FNMA 2055) ☆
- Condo Int (FNMA 1073) ☆
- Condo Ext (FNMA 1075) ☆
- Vacant Land Appraisal ☆
- Operating Inc Stmt (FNMA 216) ☆
- Comp Rent Sched (FNMA 1007) ☆
- Small Income (FNMA 1025) ☆

Property Ownership (O&E)

- O&F- Current Owner ☆

Reference ID

5 Order

Order Portal

This will open the Order Portal > New Order dashboard (6). Since you started by using TitleFlex to locate the property first, the order portal will populate the address and owner information for you (7).

The reports you selected will be checked in the report options at the left hand side of the dashboard (8) Additional fields that must be manually entered, such as the phone number for Appraisals, will be highlighted in red (9).

The screenshot shows the 'ORDER PORTAL' interface. At the top, there are three tabs: 'NEW ORDER' (PLACE A SINGLE PROPERTY ORDER), 'NEW BATCH ORDER' (PLACE A MULTI-PROPERTY ORDER), and 'VIEW ALL ORDERS' (VIEW ALL RECENT ORDER ACTIVITY). The 'NEW ORDER' tab is active. Below the tabs, there is a 'Select' section with two main categories: 'FLOOD REPORTS' and 'PROPERTY OWNERSHIP (O&E)'. Under 'FLOOD REPORTS', 'Life of Loan & Census' is selected. Under 'PROPERTY OWNERSHIP (O&E)', 'O&E- Current Owner' is selected. To the right of the 'Select' section, there is an 'Enter Property' section with several input fields: '3036 KILLYBROOKE LN', 'COSTA MESA', 'CA', '92626', 'AND OR', 'Orange', and '141-163-05'. Below these are fields for 'Owner/Borrower First Name', 'Owner/Borrower Last Name', 'OR', and 'BANK LASALLE NATION...'. There is also a field with the number '1' and a field for 'Owner/Borrower Phone' which is highlighted in red. A blue 'PLACE ORDER' button is located below the 'Owner/Borrower Phone' field. A 'Clear all and start over' link is at the bottom left of the form.

Complete the required information (9, above) and the Place Order button will activate.

This close-up shows the 'Owner/Borrower Phone' field containing the number '9255551212'. The field is highlighted in red, indicating it is a required field. Below the field is a blue 'PLACE ORDER' button.

Order Status

You will receive a "Success" banner (10). You can now track your order in the View All Orders tab (11) of the Order Portal.

The screenshot shows the 'ORDER PORTAL' interface after the order has been placed. A green banner at the top of the form area displays a success message: '✓ SUCCESS! Your order was successfully placed. Orders will be delivered individually in the View All Orders tab.' Below the banner, the 'VIEW ALL ORDERS' tab is active, showing 'VIEW ALL RECENT ORDER ACTIVITY'. The 'NEW ORDER' and 'NEW BATCH ORDER' tabs are inactive.

Checking on Orders

All orders, including those made through the Abstractor Service, are managed in the View All Orders dashboard. This will provide a summary (1) status of the number of jobs in process, those that have completed, and any that may have errors.

Each job listed will have its specific status information (2), the name or reference number, order date, the product selected, addresses (for single jobs), and the cycle time. The records can be expanded (3) so you can review the current state of the job.

The screenshot shows the 'ORDER PORTAL' dashboard. At the top, there are three main sections: 'NEW ORDER' (PLACE A SINGLE PROPERTY ORDER), 'NEW BATCH ORDER' (PLACE A MULTI-PROPERTY ORDER), and 'VIEW ALL ORDERS' (VIEW ALL RECENT ORDER ACTIVITY). Below these are five summary cards: 'All: 16', 'Processing: 3', 'Action Required: 0', 'Completed: 13', and 'Errors: 0'. A search bar is present with a 'SEARCH' button and an 'Export' link. Below the search bar is a table with columns: Status, Status Date, Ref # / Batch Name, Order #, Order Date, Product, APN, Address, City, State, Cycle, and + Details. The table contains several rows of order data. A yellow callout '1' points to the summary cards. A yellow callout '2' points to the table headers. A yellow callout '3' points to the '+ Details' link in the table.

Close up of the individual steps and statuses of a job expanded by clicking on the Details plus (+) sign




This image shows a close-up of an expanded job record from the table. It displays a list of status changes with timestamps and descriptions. For example, one record shows: 11/04/2016 10:12 AM Submitted, 11/04/2016 10:12 AM Processing Request Submitted, and 11/04/2016 10:13 AM Completed. Red arrows point to the right side of the expanded record, indicating the direction of expansion.

State	Cycle	+ Details
	0.25 h	+
	0.25 h	+
	0.25 h	+

You can expand all the job records to view their status by clicking on the Details link at the top right hand corner of the job table. Clicking on the plus sign to the right of the individual record will expand and show the status for that record only.

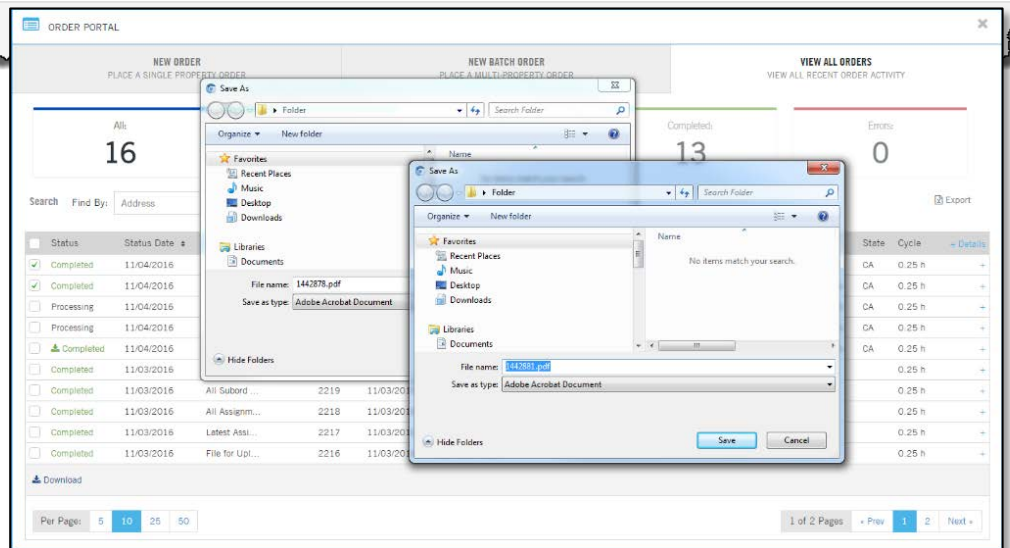
Downloading Completed Jobs

Once your jobs have finished, the status will change to Completed and a checkbox will appear next to the job along with a download icon. Select the job or jobs (1) and click the Download link (2) at the lower left hand corner of the job table.

Status	Status Date
<input checked="" type="checkbox"/> Completed	11/04/2016
<input checked="" type="checkbox"/>  Completed	11/04/2016
<input type="checkbox"/> Processing	11/04/2016
<input type="checkbox"/> Processing	11/04/2016
<input type="checkbox"/>  Completed	11/04/2016
<input type="checkbox"/> Completed	11/03/2016
<input type="checkbox"/> Completed	11/03/2016
 Download	

Product	APN	Address	City	State	Cycle	+ Detail
Basic Flood & Census	140-361-0...	1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
Basic Flood & Census	140-361-0...	1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
Pace	140-361-0...	1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
Std Appraisal FNMA 1004	140-361-0...	1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
Basic Flood & Census	140-361-0...	1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
Latest Assignment					0.25 h	
Open Lien Report					0.25 h	

TitleFlex will prompt you for the location to save the file. If you selected multiple jobs to download, there will be multiple Save As dialog boxes.



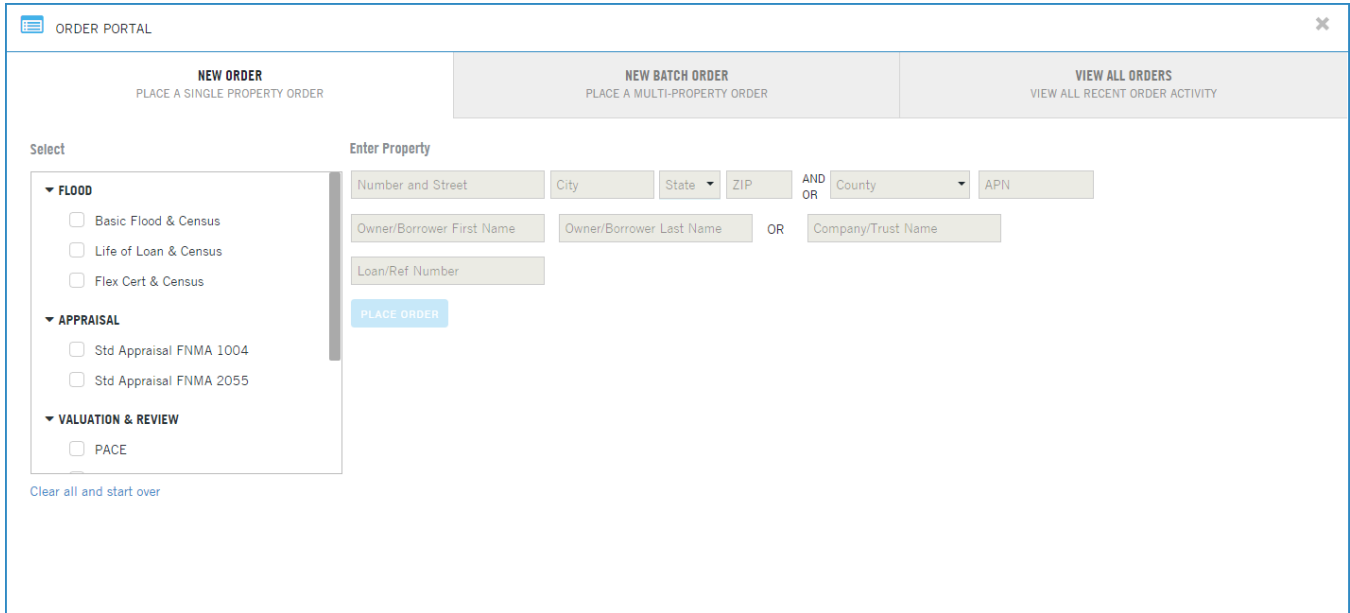
Depending upon the size of the file, the Save As dialog box might take a minute or two to appear. Be patient. Clicking the Download link again will result in a second dialog box and additional wait time.

Workflow Options

You can order reports singly using the Order Portal and skip the initial step for locating the property in TitleFlex.



Simply open the Order Portal, select the report or reports and enter the property information directly into the form. The process for checking on the order status and downloading completed reports remains the same.

The screenshot shows the 'ORDER PORTAL' interface. At the top, there are three main sections: 'NEW ORDER' (PLACE A SINGLE PROPERTY ORDER), 'NEW BATCH ORDER' (PLACE A MULTI-PROPERTY ORDER), and 'VIEW ALL ORDERS' (VIEW ALL RECENT ORDER ACTIVITY). Below these is a 'Select' menu with three categories: 'FLOOD' (Basic Flood & Census, Life of Loan & Census, Flex Cert & Census), 'APPRAISAL' (Std Appraisal FNMA 1004, Std Appraisal FNMA 2055), and 'VALUATION & REVIEW' (PACE). To the right is the 'Enter Property' form with fields for 'Number and Street', 'City', 'State', 'ZIP', 'AND OR', 'County', 'APN', 'Owner/Borrower First Name', 'Owner/Borrower Last Name', 'OR', 'Company/Trust Name', and 'Loan/Ref Number'. A 'PLACE ORDER' button is located below the form. A 'Clear all and start over' link is at the bottom left.

If you have a list of properties that need reports or documents ordered, use the Batch Order Service. Please see the document “TitleFlex Batch Ordering” on the TitleFlex Support Site. (<http://www.TitleFlex.com/academy>).