

OMS Client Job Aid

Initial Profile Set-Up

- An email will be sent to you with your user name, temporary password and a link to the Trimavin login page
- You will be prompted to reset your password
 - *Password Requirements: minimum **8** characters, **1** lower case, **1** upper case, **1** number, and **1** special character
- Choose your security questions and create answers
- Your Profile is now active and ready to place orders

Profile Navigation

| [Admin](#) | [Orders](#) | [Logout](#) | 2/7/19 3:11 PM PST

- **Admin** – This is where you can update your Contact Information, Password, Security Questions
- **Orders** – This screen will show you all Open (default) or Closed orders based on selection
- **Logout** – This will log you out of your profile

Orders | **New Appraisal**

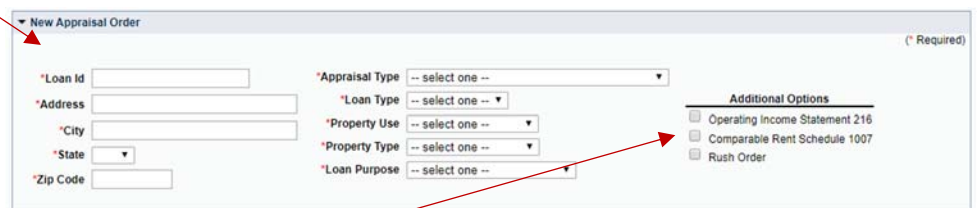
- **Orders** – This screen will show you all Open (default) or Closed orders based on selection
- **New Appraisal** – This is where you go to place a new appraisal order

Order Creation

To place a new appraisal order, click on **New Appraisal** at the top of the page and fill in the following required information:

1) New Appraisal Order section

- Loan Id
- Address
- City
- State
- Zip Code
- Appraisal Type
- Loan Type
- Property Use
- Property Type
- Loan Purpose
- Additional Options (optional)



New Appraisal Order (*) Required

*Loan Id

*Address

*City

*State

*Zip Code

*Appraisal Type -- select one --

*Loan Type -- select one --

*Property Use -- select one --

*Property Type -- select one --

*Loan Purpose -- select one --

Additional Options

Operating Income Statement 216

Comparable Rent Schedule 1007

Rush Order

* Depending on the order details selected, the options will change accordingly

2) Contacts Section

* Contact "Roles" will change accordingly based on above selections, one (1) contact is required.

- Contact First Name
- Contact Last Name
- Email (optional)
- Alternate Phone (optional)
- Primary Phone
- Property Access

* Select at least 1 person/role who has property access

Role:	Borrower	Coborrower
*First Name	<input type="text"/>	<input type="text"/>
*Last Name	<input type="text"/>	<input type="text"/>
Email	<input type="text"/>	<input type="text"/>
*Primary Phone	<input type="text"/>	<input type="text"/>
Alternate Phone	<input type="text"/>	<input type="text"/>
*Property Access	<input type="checkbox"/>	<input type="checkbox"/>

3) Order Notes Section

- If you have any special instructions, please fill in the details in this section.

! Important Information

- **Rush orders** – If the option is available to you, select “Rush Order” under the ‘Additional Options’.
* Rush fee breakdown will be within the ‘Options and Order Fees Estimate’
- **FHA orders** – The FHA Case Number is not required at the time the order is placed however it is highly recommended. If the FHA Case Number isn’t added at order creation, several warnings will appear on different screens reminding you that the FHA Case Number is missing. You can add it to the order at any point however your order may be delayed.
- **Purchase orders** – If the ‘Loan Purpose’ selected is ‘Purchase’, you will be prompted to upload the Purchase Contract in PDF format.

4) Once ready to proceed, click “Continue”.

5) Order Confirmation page – Review all order information entered for accuracy, click on the “Back” button at the bottom of the page if changes are needed.

6) Date/Time Needed – If there is a specific date/time you need the appraisal report completed by that is different from the estimate provided, enter the date/time by clicking on the calendar icon.

Based on the property location, appraisal type and options selected, we estimate that the report should be delivered by end of business day **Wednesday 2/13/19 PST**. This is a rough estimate and could vary significantly according to the availability of the property contacts, current market conditions, and other factors outside of our control. (Optional) Date/time you need this report to be completed

7) Available Dates and Times for Inspection - If known, select date and time the property contact will be available to provide access to the property for inspection. This is not required. The appraiser will still be required to contact the property contact to confirm the inspection date and time.

8) Options and Order Fees Estimate – If any “Additional Options” were selected on the previous screen, the fee breakdown will show them here. This is an estimate and are subject to change, you will be notified of any fee adjustments.

Description	Fee
Single Family/PUD Investment (1004/1007) California, ORANGE	\$650
Operating Income Statement 216	\$100
Rush Order	\$100
Total	\$850

9) Payment Method – Select the payment method from the dropdown. Depending on client access you may have the following options:

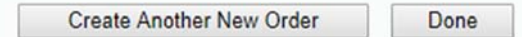
- **Borrower Pays By Credit Card On Our Website** – An email will be sent to the borrower with a link they can click on to place payment into the order.
- **Borrower/3rd Party Credit Card** – This allows you to enter the credit card details yourself
- **Invoice** – If selected, when the order is completed you will receive an invoice showing an outstanding balance to be paid upon receipt. A statement will also be sent at the end of each month should there be any outstanding balances due. This method is not available to all clients. If Invoice is an option, please note you can split the payment between a credit card and invoice (i.e. charge card for partial amount and bill the remaining).

10) Once ready to place the order, click **“Submit”**.



11) The order has now been placed and a Product Order Number is assigned. You are now able to select **“Create Another New Order”** or **“Done”**.

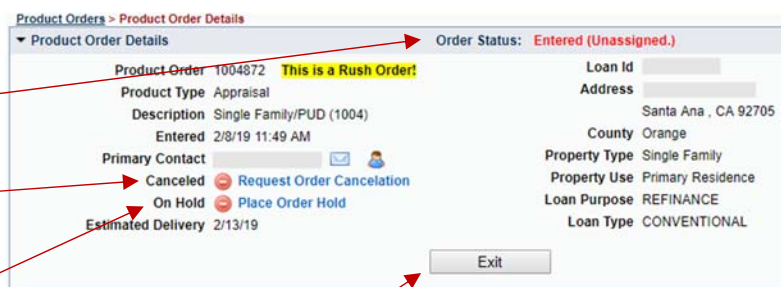
- **Create Another New Order** – this will take you back to the New Appraisal Order screen.
- **Done** – This will take you to the Orders screen.



Order Updates

To view specific order details, click on the order you would like to view from the **“Orders”** screen.

- **Order Status** – The current order status will show in red at the top of the order in red.
- **Canceled** – To cancel the order, click on **“Request Order Cancellation”**.
- **On Hold** – To place the order on hold, click **“Place Order Hold”**, a screen will pop up allowing you to enter in the details.
- **Exit** – By clicking this, it will take you back to the **“Orders”** screen.
- **Upload Document** – By clicking this, it will give the option to upload a new document.



- **Add Product Order Note** – By clicking this, it will allow you to enter in a note that will be sent to Trimavin as well as show in the order history notes.



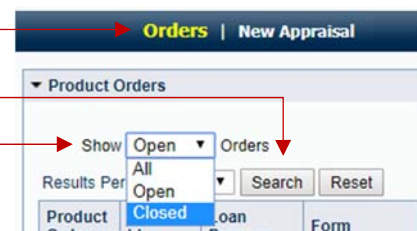
Order Milestone Emails

Throughout the lifespan of an order, you will receive automatic notifications/emails informing you of the following milestones:

- When an appraiser has been assigned to the order
- When the inspection date/time is confirmed scheduled
- When the inspection has been completed
- When the order is completed and ready for download

Completed Orders

- To view all completed orders, go to the **“Orders”** screen and select **“Closed”** in the drop down then **“Search”**.
- To download the appraisal package, click into the order you want to see then click **“Click here to download Appraisal, License and E&O Insurance as a single combined document”**.



[Click here to download Appraisal, License and E&O Insurance as a single combined document.](#)

Followup Orders

- If the original appraisal was **not** completed by Trimavin, follow the instructions above under “Order Creation”.
- If the original appraisal **was** completed by Trimavin, proceed as follows:
 - 1) Select the original appraisal order in your “**Closed**” orders (see above instructions “Completed Orders”).
 - 2) Click “**Place Followup Order**” in the ‘Product Order Details’ section.



- 3) Select the “**Followup Order Type**” and if the order is needed as a “Rush”

- ✓ External Property Inspection (2075)
- ✓ Coop Interest Appraisal (2090)
- ✓ External Coop Interest (2095)
- ✓ Update Inspection (1004D)
- ✓ Final Inspection (1004D)
- ✓ Update and Final Inspection (1004D)
- ✓ Compliance Inspection (92051)
- ✓ Rent Schedule (1007)
- ✓ Operating Income Statement (216)

- 4) Enter any additional notes and click “**Continue**”.

- 5) **Date/Time Needed** – If there is a specific date/time you need the appraisal report completed by that is different from the estimate provided, enter the date/time by clicking on the calendar icon.

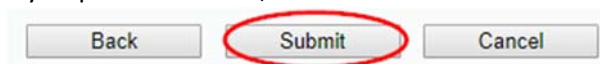
Based on the property location, appraisal type and options selected, we estimate that the report should be delivered by end of business day **Wednesday 2/13/19 PST**. This is a rough estimate and could vary significantly according to the availability of the property contacts, current market conditions, and other factors outside of our control.
 (Optional) Date/time you need this report to be completed

- 6) **Order Notes** section - If you have any special instructions, please fill in the details in this section.

- 7) **Payment Method** – Select the payment method from the dropdown. Depending on client access you may have the following options:

- **Borrower Pays By Credit Card On Our Website** – An email will be sent to the borrower with a link they can click on to place payment into the order.
- **Borrower/3rd Party Credit Card** – This allows you to enter the credit card details yourself.
- **Invoice** – If selected, when the order is completed you will receive an invoice showing an outstanding balance to be paid upon receipt. A statement will also be sent at the end of each month should there be any outstanding balances due. This method is not available to all clients. If Invoice is an option, please note you can split the payment between a credit card and invoice (i.e. charge card for partial amount and bill the remaining).

- 8) Once ready to place the order, click “**Submit**”

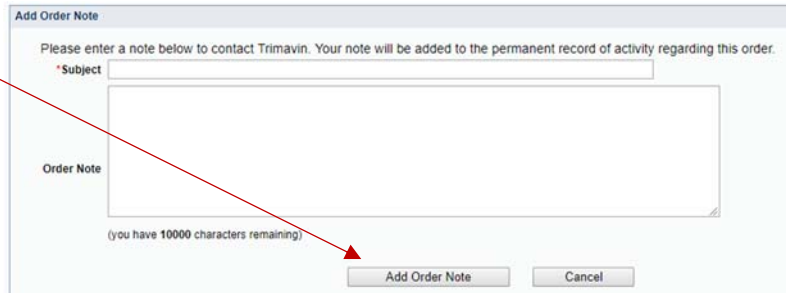


Underwriting Condition & Value Appeal Requests

- 9) To submit an Underwriting Condition or Value Appeal request, click **“Add Product Order Note”** within the order details .



- 10) Add the subject of **“Underwriter Condition”** or **“Value Appeal”**, add in the request details and select **“Add Order Note”** .

A screenshot of a web form titled "Add Order Note". The form contains a text input field labeled "Subject" and a larger text area labeled "Order Note". Below the text area, it says "(you have 10000 characters remaining)". At the bottom of the form are two buttons: "Add Order Note" and "Cancel". A red arrow points from the text "Add Order Note" in step 10 to the "Add Order Note" button in the form.

- 11) TriMavin will contact the Appraiser to correct any errors and will keep you updated during the process.
- 12) Once the Underwriter Conditions or Value Appeals are corrected, you will be informed once the revised report is ready for download.