UAD 3.6

Mercury Network® Configuration Workbook

A self-paced guide to configuring Mercury Network for UAD 3.6 order fulfillment

Lender Edition • Valuation Modernization Program • Version 1.1 • 2026

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Contents

How to Use This Workbook

This workbook guides you through every configuration step required to go live with UAD 3.6 on Mercury Network. It is designed to be worked through at your own pace — complete one section, check it off, and move to the next.

Each configuration section follows the same structure:

1. Before You Begin — prerequisites and dependencies to check before starting that step.
2. What You'll Need — information, data, or decisions you should have ready.
3. Navigation — exact path in Mercury Network to find the setting.
4. Step-by-step instructions — numbered actions to complete the configuration.
5. You're Done When — a clear completion check so you know when to move on. This is located on the last page of this document titled "Go-live checklist"

Note: *UAD 3.6 configurations are separate from legacy forms. Completing this workbook will not affect your existing legacy form workflow. Mercury Network will continue to support legacy forms as-is.* ***Not all configurations in this workbook may apply to your workflow. Please ensure that you are ONLY configuring what applies for your workflow.***

UAD 3.6 Mercury Network configurations involve more than a routine update — coordinate internal training and follow your change management process before ordering UAD 3.6 orders.

Configuration Order — Why It Matters

Some settings depend on others being in place first. Follow the phases in order to avoid having to backtrack.

For example: you cannot assign a UCDP Submission Plan to a Client Group until that plan has been created in Connection Settings. And you cannot set up fee plans without first defining your complexity value tiers. The phase structure below reflects these dependencies.

Your Progress Checklist

Use this table to track your progress. Check off each item as you complete it. Return to this page whenever you pick up the workbook again.

Phase	Configuration Items (check off as you complete each one)
Phase 1 Foundation	☐ User Profiles ☐ Property Characteristics
Phase 2 Fees & Products	☐ Fee Administration ☐ Engagement Letter Content ☐ Product Requirements
Phase 3 Vendors & Clients	☐ Vendor Profiles ☐ Investor Submission Config ☐ Client Groups

Phase	Configuration Items (check off as you complete each one)
Phase 4 Workflow	☐ Critical Rule Firings ☐ Pending Release Status
Phase 5 Operational	☐ Reporting ☐ VMP Client Status Mapping ☐ Action Required Folder

Sections

Phase 1 Foundation

Set up the people and the order form first. These settings are referenced by everything else in the workbook.

1.1 User Profiles

Overview

Three permissions have been added or changed for UAD 3.6. You need to assign the right permissions before anyone can configure fees, submit to UCDP, or send orders to Investigate for review.

Before you begin:

- ☐ You have admin access to Mercury Network.
- ☐ You know which users will manage fees, submit to UCDP, and approve Investigate review.

What you'll need:

- ☐ A list of users who need the Manage UAD 3.6 Fees permission.
- ☐ A list of users who need Submit to Review and/or Submit to UCDP permissions.

Secure (Mercury Network Admin)

Navigate to: Users → [Select User] → Permissions

1	**Navigate to Users.**
2	**Select the user to update.**
3	**Scroll to the Permissions section.**
4	**Under Preferences Management, review UAD 3.6 Fees.** Required for anyone who will create or edit fee plans in Preferences → Fees.
5	**Under Order Management, review Submit to Review.** Enable for users who should manually send completed UAD 3.6 appraisals to Investigate review. Only works for orders that have a delivered appraisal.
6	**Under Order Management, review Submit to UCDP.** Review for users who should manually trigger UCDP submission for UAD 3.6 orders. Only works for orders that have a delivered appraisal.

7	**Save the user profile.**
8	**Repeat for all users who need these permissions.**

Note: *All users can view the Investigate section regardless of the Submit to Review permission setting. The permission controls the ability to manually submit only.*

✓ **You're done when:** All users have the correct permissions. Users responsible for fees, UCDP, and review can access the relevant modules.

1.2 Property Characteristics

Overview

UAD 3.6 does not have named products for loan types like 203k, HomeStyle Renovation, or Reverse Mortgage. Instead, you add these as custom Property Characteristics that order originators can select.

Note: Enable the property characteristics field by adding a green checkmark to the Show column

For example: a legacy 1004 FHA 203k is now ordered as Valuation Method = Traditional Appraisal, Property Type = Single Family, with a Property Characteristic of "203k". The fee add-on for 203k is then configured in your fee plan.

Before you begin:

- ☐ User Profiles (1.1) is complete.

What you'll need:

- ☐ A list of custom characteristics your team uses today that aren't covered by standard UAD 3.6 fields (e.g., 203k, HomeStyle, Reverse Mortgage, Construction-to-Perm, Mixed-Use, Investment).

Secure (Mercury Network Admin)

Navigate to: Preferences → VMP Client Order Setup → Configure Order Form

1	**Navigate to Preferences → VMP Client Order Setup → Configure Order Form.**
2	**Locate the Property Information section.**
3	**Find the Prop Characteristics row.**
4	**Click the Constraints icon on that row.**
5	**Add each custom characteristic your organization uses.** Examples: 203k, HomeStyle, Reverse Mortgage, Construction-to-Perm, Mixed-Use.
6	**Save the configuration.**

Note: *The new UAD 3.6 fields added to the Residential Appraisal order form (Property Type, Valuation Method, etc.) are NOT configurable at this time. Only Property Characteristics supports custom options.*

✓ **You're done when:** All custom order characteristics (203k, HomeStyle, etc.) appear in the Property Characteristics field on the UAD 3.6 order form.

Phase 2 Fees & Products

Configure how orders are priced and what instructions go to your vendors. Fees must be set up before products can be finalized.

2.1 Fee Administration

Overview

UAD 3.6 fees are no longer tied to a form number. Instead, each order's fee is calculated from: base fee (by product and value tier) + add-on fees (Rush, Construction Method, ADU, Rent Schedule, etc.).

You will set up fees in three stages: (1) define value tiers, (2) create vendor fee plans, (3) create client price plans. Please reference Appendix A of this Configuration Guide.

Before you begin:

- ☐ Phase 1 (Foundation) is complete.
- ☐ You have reviewed Appendix B of this guide.
- ☐ You have decided how many value/complexity tiers you need (e.g., 3 tiers: $0 – $200k / $200k – $500k / $500k+).
- ☐ You have reviewed the Legacy Form → UAD 3.6 mapping document provided by Cotality. This is located in Appendix A of this document.

What you'll need:

- ☐ Your fee schedule by Cotality UAD 3.6 product and geography.
- ☐ Your add-on fee amounts (Rush, Construction Method, ADU count, Rent Schedule, Mortgage Type, etc.).
- ☐ The list of clients or client groups each fee plan applies to.
- ☐ A list of vendors whose fee plans differ from the standard fees.
- ☐ Have Appendix B of this guide readily available for review.

Secure (Mercury Network Admin)

Navigate to: Preferences → Fees

1	**Step A — Define Value Tiers first.** Navigate to Preferences → Fees → Value Tier Management. Add a new tier and enter a value in the Maximum Value field. • The system automatically creates a final tier that ranges from the previous limit to "infinity" • You can define up to ten tiers for your account Click Save Changes

2	**Step B — Create Vendor Fee Plan(s).**
	Navigate to Preferences → Fees → Vendor Fee Plans → Create New Plan → Bulk Upload
	• Enter a name in the **Fee Plan Name** field
	• Select **Default Plan** if this will be your default Fee Plan. You must always have one default plan.
	• Choose your **Base Fees** methodology for the plan:
	  ◦ **Use Vendor default fees** – Uses the assigned provider's standard rates as configured in their vendor profile.
	  ◦ **Set fees as a percentage of the client price** – Calculates fees based on a percentage of the client fee that is calculated for the order. To utilize this approach, you must establish a Client Price Plan.
	  ◦ **Manually add fees** – Allows the user to specify custom fees for different kinds of orders. User will need to enter base fees and add-on for all applicable products and geographies.
	• Click **Next**
	• In the **Upload Plan Details** section, click on the **Instructions** to view the file requirements
	  ◦ Download the appropriate template for either **Clients** or **Client Groups**.
	  ◦ **NOTE:** You may create as many additional fee plans as necessary. Each fee plan applies strictly to either **Clients** or **Client Groups**, not both. Each **Client** or **Client Group** can exist in only one fee plan outside the default plan.
	• Populate the fee plan spreadsheet. On the **Plan** tab, include your pricing per product, geographic area, Value Tier, and add-on fees. On the **List** tab, list the specific **Clients** or **Client Groups** this plan applies to.
	• Upload and Save your fee plan spreadsheet.
	• Monitor your spreadsheet upload status and confirm the plan passed validation.

3	**Step B (optional) — Vendor Exception Plans.**
	Preferences → Fees → Vendor Exception Fee Plans → Create New Plan → Bulk Upload
	• Enter a name in the **Fee Plan Name** field
	• Choose your **Base Fees** methodology for the plan:
	    • **Use Vendor default fees** – Uses the assigned provider's standard rates as configured in their vendor profile.
	    • **Set fees as a percentage of the client price** – Calculates fees based on a percentage of the client fee that is calculated for the order. To utilize this approach, you must establish a Client Price Plan.
	    • **Manually add fees** – Allows you to specify custom fees for different kinds of orders. You will need to enter base fees and add-on for all applicable products and geographies.
	• Click **Next**
	• In the **Upload Plan Details** section, click on the **Instructions** to view the file requirements
	    • Download the **Vendor Exceptions** template.
	• Populate the fee plan spreadsheet. On the **Plan** tab, include your pricing per product, geographic area, Value Tier, and add-on fees. On the **List** tab, list the specific **Vendor(s)** this plan applies to. These fees will override the default plan for the specified **Vendors**.
	• Upload and Save your fee plan spreadsheet.
	• Monitor your spreadsheet upload status and confirm the plan passed validation.

4	**Step C — Create Client Price Plan(s).** Preferences → Fees → Client Price Plans → Create New Plan → Bulk Upload • Enter a name in the **Fee Plan Name** field • Click **Next** • In the **Upload Plan Details** section, click on the **Instructions** to view the file requirements • Download the **Client Price Plan** template. • Populate the fee plan spreadsheet. On the **Plan** tab, include your pricing per product, geographic area, Value Tier, and add-on fees. • Monitor your spreadsheet upload status and confirm the plan passed validation. • **NOTE:** If you need to specify different fees for specific Clients or Client Groups, be sure to cover step 5, "Step D (optional) – Create Client Exception Plan(s)"

5	**Step D (optional) – Create Client Exception Plan(s).**
	Preferences → Fees → Client Exception Price Plans → Create New Plan → Bulk Upload
	• Enter a name in the **Fee Plan Name** field
	• Click **Next**
	• In the **Upload Plan Details** section, click on the **Instructions** to view the file requirements
	    • Download the appropriate template for either **Clients** or **Client Groups**.
	    • **NOTE:** You may create as many additional fee plans as necessary. Each fee plan applies strictly to either **Clients** or **Client Groups**, not both. Each **Client** or **Client Group** can exist in only one fee plan outside the default plan.
	• Populate the fee plan spreadsheet. On the **Plan** tab, include your pricing per product, geographic area, Value Tier, and add-on fees. On the **List** tab, list the specific **Clients** or **Client Groups** this plan applies to. These fees will override the default plan for the specified **Client(s)** or **Client Group(s)**.
	• Upload and Save your fee plan spreadsheet.
	• Monitor your spreadsheet upload status and confirm the plan passed validation.

Note: *All UAD 3.6 fees are managed under Preferences → Fees – they are not managed anywhere else.*

✓ **You're done when:** Value tiers are defined. At least one Vendor Fee Plan and one Client Price Plan are saved, covering your active products and geographies.

2.2 Engagement Letter Content

Overview

UAD 3.6 orders use different data points than legacy forms, so they require a separate engagement letter template. Mercury Network ships a default UAD 3.6 template, but most lenders will want a customized version. All existing templates have been automatically classified as Legacy Forms.

Before you begin:

- ☐ Product Requirements (2.2) is started — you can apply the template as part of that step.

What you'll need:

- ☐ Your engagement letter language for UAD 3.6 appraisals.
- ☐ Decisions on which UAD 3.6 merge fields to include (Property Type, Valuation Method, Construction Method, ADU Count, etc.).

Secure (Mercury Network Admin)

Navigate to: Preferences → Product Requirements → Engagement Letter Templates → Create New

1	Navigate to Preferences → Product Requirements → Engagement Letter Templates.
2	Click Create New.
3	Enter a name (e.g., "UAD 3.6 Standard Engagement Letter").
4	**Set template Type to Products.** This is the UAD 3.6 classification. It unlocks UAD 3.6-specific merge fields in the Order Fields dropdown. Selecting Legacy Forms here would not include UAD 3.6 fields.
5	Click OK to open the template editor.
6	**Insert UAD 3.6 merge fields using the Order Fields dropdown.** New fields available: Property Type, Property Valuation Method, Construction Method, ADU Count, PUD Indicator, Valuation Assignment Type, Mortgage Type, Prop Attachment, Rent Schedule Indicator, and more.
7	**Draft and style your engagement letter body.** Use the Design view for visual editing or HTML view for direct markup.
8	Click Save.
9	**Apply the template to UAD 3.6 products.** Go back to Preferences → Product Requirements → Residential Appraisal, open each product, and in Order Options select this template from the Statement of Engagement dropdown.

Note: *Do not apply a Legacy Forms template to UAD 3.6 products. The Legacy Forms templates do not include UAD 3.6 data fields, so those fields will appear blank in the engagement letter.*

✓ **You're done when:** At least one UAD 3.6 Products engagement letter template is saved and applied to your UAD 3.6 products in Product Requirements.

2.3 Product Requirements

Overview

Product Requirements is where you set per-product instructions, vendor designation requirements, and assignment behavior. For UAD 3.6, fees are no longer entered here — they live in the Fees module. You must configure each UAD 3.6 product you intend to use.

Before you begin:

- ☐ Fee Administration (2.1) is complete.
- ☐ You know which UAD 3.6 products your organization will use.

What you'll need:

- ☐ Any special instructions or required documents for each product type.
- ☐ Vendor designation requirements per product (if applicable).
- ☐ Decision on double-blind, auto-assignment, and unattended reassignment per product.

Secure (Mercury Network Admin)

Navigate to: Preferences → Product Requirements → Residential Appraisal tab

1	**Navigate to Preferences → Product Requirements.**
2	**Click the Residential Appraisal tab (UAD 3.6 products).** This tab lists all 26 standard UAD 3.6 products. Legacy forms remain under the Residential Appraisal – Legacy Forms tab, unchanged.
3	**Click a product to open its settings.** Start with your highest-volume product (e.g., Traditional Appraisal – Single Family).
4	**Comments / Special Instructions section:** These are sent with every order for this product. Use for scope-of-work notes, reporting requirements, or client-specific guidance.
5	**Designations section: set vendor qualification rules.** Options: Do not use, Prefer vendors with this designation, or Require vendors to have this designation. Select applicable appraiser designations.
6	**Order Options section: upload any required Attached Documents.** Also select the Statement of Engagement template. Note: UAD 3.6 engagement letter templates must be set up first (see Section 2.3). You can return to this step after completing 2.3.
7	**Assignment Options: configure automation settings.** Enable Double-blind Communication, Automatic Vendor Selection, Unattended Order Assignment, or Unattended Order Reassignment as appropriate for this product.
8	**Save and repeat for each UAD 3.6 product you use.**

Note: *The Required Forms section is not available for UAD 3.6 products. Requirements are dictated by the scope of work and the dynamic URAR form itself.*

✓ **You're done when:** All UAD 3.6 products your organization will use are configured with designations, instructions, and assignment options.

Phase 3 Vendors & Clients

Update who is eligible to receive orders and configure how those orders are submitted to UCDP. These settings depend on your fee plans and products being in place.

3.1 Vendor Profile Updates

Overview

Vendor profiles now include UAD 3.6 eligibility criteria. A vendor must have the applicable criteria checked before they appear eligible for orders with those characteristics.

UAD 3.6 products now appear under the Residential Appraisal tab in the vendor's Products Area. Legacy forms have moved to a Residential Appraisal – Legacy Forms tab.

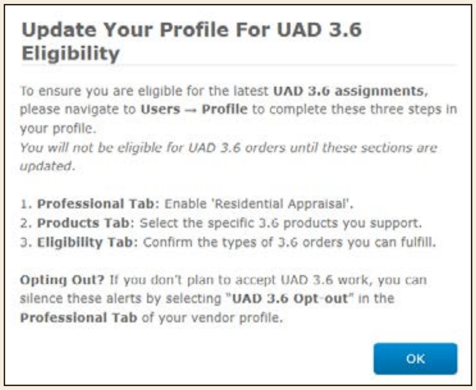
All vendors have been pre-loaded with Conventional Mortgage Type eligibility (read-only). All other new criteria require manual review.

Before you begin:

- ◻ You have reviewed the UAD 3.6 readiness report in the Vendor section to identify which vendors have not yet updated their profiles.

What you'll need:

- ◻ Your appraiser panel list.
- ◻ Cotality has sent communications to all appraisers asking them to update their profiles. Cotality is also notifying Vendors via a pop-up message when they log in to the vendor portal. See below for a screenshot of the message:



Secure (Mercury Network Admin)

Navigate to: Fee Panel → [Select Vendor] → Profile → Eligibility Tab

1	**Navigate to Fee Panel**
2	**Run the UAD 3.6 readiness report to see which vendors need updates.** This report is in the Fee Panel section of Mercury and lists appraisers not yet eligible for UAD 3.6 products.
3	**Open a vendor's profile and click the Eligibility tab.**
4	**Review and check Construction Method Type criteria.**
5	**Review and check the Mortgage Type criteria.** Conventional is pre-checked (read-only). Check additional types: FHA, VA, USDA Rural Development, Private, Other.
6	**Review and check Property Usage Type criteria.**
7	**Review and check the Valuation Assignment Type criteria.** Check all types this vendor accepts: Construction, DeedInLieu, HomeEquity, LoanModification, PortfolioEvaluation, Preforeclosure, Purchase, Refinance, REO, ShortSale, Other.
8	**Review and check Living Unit Excluded ADU Count criteria**
9	**Review and check Miscellaneous criteria**
10	**Save the vendor profile.**
11	**Click the Products tab → Residential Appraisal tab.** Check and manage each UAD 3.6 product this vendor covers.
12	**Repeat for all panel vendors.** Prioritize vendors who handle your highest-volume order types.

✓ **You're done when:** All panel vendors have updated eligibility criteria and have UAD 3.6 products approved in their Products Tab.

3.2 Investor Submission Configuration

Overview

You must decide whether UCDP submission for UAD 3.6 orders will happen automatically or manually. This is a global setting. Then you create at least one UCDP Submission Plan that specifies your Business Unit, Seller Servicer numbers, and which products are eligible.

Client Groups reference these plans — so plans must be created before you configure Client Groups in the next step.

Before you begin:

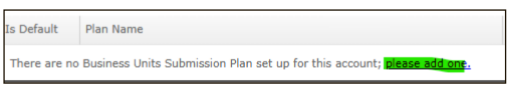
- ☐ You know whether UAD 3.6 UCDP submission should be automatic or manual for your organization.

What you'll need:

- ☐ List of any products you want to exclude from auto-submission.
- ☐ If you have multiple business units: one plan per BU.

Secure (Mercury Network Admin)

Navigate to: Preferences → Connection Settings

1	**Navigate to Preferences → Connection Settings.**
2	**Locate the UCDP Submission Settings section.**
3	**Set the Submission Type to Manual or Automatic.** Manual: a user with Submit to UCDP permission must submit each order. Automatic: eligible orders are submitted when they reach the trigger status. This applies globally to all UAD 3.6 orders.
4	**Under Business Unit Submission Plans.**  Click on "Please add one" to create a new plan.
5	**Enter Plan Name.** Cotality recommends that the plan name is descriptive, especially if multiple plans are needed.
6	**Enter the Business Unit name.**
7	**Select which GSE(s) to submit to: Fannie Mae, Freddie Mac, or both.**
8	**Click the Product Settings icon and deselect any products that should not be submitted.** All products are eligible by default.
9	**Check the Is Default box if this plan should apply to all client groups unless overridden.**
10	**Save the plan.**
11	**Repeat for additional Business Units if needed.**

Note: *If you select Manual submission, the product eligibility settings in the plan are ignored — any user with the Submit to UCDP permission can manually submit any UAD 3.6 product.*

✓ **You're done when:** Global submission type (Manual or Automatic) is set. At least one UCDP Submission Plan exists with valid Business Unit.

3.3 Client Groups — Automated Tab

Overview

The Client Group Automated Tab now has three UAD 3.6-specific settings: SureReceipts delivery for UAD 3.6 products, the Pending Release feature (a QC pause before Completed), and UCDP Submission Plan assignment. You need UCDP Submission Plans in place before completing this step.

Before you begin:

- ☐ Investor Submission Configuration (3.2) is complete — UCDP plans must exist.
- ☐ You have decided which client groups need a non-default UCDP plan.
- ☐ You have decided which client groups should use the Pending Release QC pause.

What you'll need:

- ☐ For each client group: which UCDP Submission Plan to assign.
- ☐ For each client group: whether to enable Use Pending Release.

Secure (Mercury Network Admin)

Navigate to: Clients → Client Groups → Manage Client Groups → [Select Group] → Automated Tab

1	**Navigate to Clients → Client Groups → Manage Client Groups.**
2	**Open the first client group to configure.**
3	**Click the Automated tab.**
4	**Locate SureReceipts Delivery.** Under "Customize Automated Delivery", set whether SureReceipts automatically send to borrowers for UAD 3.6 appraisals and when (immediately vs. after order is marked Complete).
5	**Locate the Use Pending Release checkbox.** Check this to enable a Pending Release status for UAD 3.6 orders in this group. When enabled, orders stop at Pending Release after UCDP submission / review rather than auto-completing. Pending Release is the UAD 3.6 equivalent of Quality Control (QC) Folders.
6	**Under UCDP Settings, set the Submission Plan.** Select the UCDP Submission Plan for this client group. If this group uses the same plan as the global default, you can leave this as "None Selected".
7	**Save the Client Group.**
8	**Repeat for all client groups.**

Note: *UAD 3.6 fees are NOT configured in the Client Group profile. The Details tab fee tables that exist today do not apply to UAD 3.6 orders. All UAD 3.6 fees are managed in Preferences → Fees.*

✓ **You're done when:** All client groups have SureReceipts, Pending Release option, and a UCDP Submission Plan set.

Phase 4 Workflow

Configure the automated rules that fire at appraisal upload and the QC hold that pauses orders before completion.

4.1 Investigate Critical Rule Firings (Coming Soon)

Overview

Mercury now runs three types of automated rules the moment a vendor uploads an appraisal: (1) virus scan and file validation, (2) UAD rules confirming the zip file meets UAD 3.6 schema (completeness check) requirements, (3) UCDP validations, and (4) review rules (Investigate customers only).

When a Fatal rule fires at any point in the validation process, the order moves to Revision – Correction Needed and the vendor automatically receives a revision request — without any manual action needed from your team.

Before you begin:

- ☐ You are an Investigate customer. If you are not, this section does not apply — skip to 4.2.
- ☐ You have reviewed the list of available review rules with your Cotality contact.

What you'll need:

- ☐ A list of review rules your organization wants to treat as Severe (blocking at upload).
- ☐ Decision on which products should bypass Investigate review entirely.
- ☐ Decision on whether any client groups need different review plans.

Secure (Mercury Network Admin)

Navigate to: Preferences → Review Settings → Investigate Tab

1	**Navigate to Preferences → Review Settings.**
2	**Click the Investigate tab.** (Coming Soon).
3	**Review the list of available review rules.** (Coming soon).
4	**Mark as Severe any rule that should block an order and require vendor correction at upload.** When a Severe rule fires, the order moves to Revision – Correction Needed and the vendor receives an automated revision request.
5	**Click Add Review Plan if you need to exclude certain products from review.** In the Product Settings for the plan, deselect products you do not want routed to Investigate.
6	**Assign different review plans to Client Groups if needed.** Open each relevant Client Group and select the appropriate Review Plan.
7	**Save your Review Settings.**

Note: *In a future release, you will be able to configure Mercury to consolidate vendor feedback across rule checks to reduce the number of revision requests. This feature is not yet available at initial launch.*

✓ **You're done when:** Fatal review rules are defined. Review plans are set up to include or exclude the right products. Client Groups with different review plans are configured.

Phase 5 Operational

5.1 Reporting – Coming Soon

Overview

We're getting ready to launch a major upgrade to your reporting experience. To support the industry-wide shift to **UAD 3.6**, we are introducing a new suite of standardized reports designed for deeper insights and automated delivery. This suite is designed to give you more direct control and deeper insights into your data.

We developed these powerful reports after analyzing usage patterns across our entire customer base to ensure you receive the most essential insights.

Key Features:

- **Run On-Demand:** Access and run any report at any time, whenever you need immediate data.
- **Automate Your Insights:** Set up **subscriptions** to schedule specific reports. Choose the interval that works best for you and have the data **automatically distributed** to the email addresses you provide.
- **Choose your parameters:** Configure each report to ensure it includes exactly what you need.

While we finish the final touches, now is the time to review your **downstream systems**. Because UAD 3.6 will use these new standardized reports rather than legacy or custom reports, your internal data ingestion tools may need to be updated.

Your "Stay Ready" Checklist:

1. **Review Downstream Ingestion:** Once you start placing UAD 3.6 orders, you will receive data via these new reports. Custom reports are not supported for UAD 3.6. Ensure your systems are ready to ingest new formats.
2. **Legacy Coverage:** Don't worry—your custom-managed reports will continue to support your legacy forms pipeline.
3. **Watch for Updates:** To ensure you have the most up-to-date information, please subscribe to the Mercury Network release notes.

5.2 VMP Client Status Mapping

Overview

Seven new major statuses have been introduced for UAD 3.6. Review each one and configure whether you want it synced to VMP Client orders. This is only needed if your team uses VMP Client and needs order status reflected there.

Before you begin:

- ☐ Your LOS or VMP Client integration is active.

What you'll need:

- ☐ A decision on statuses that should sync to the Client and statuses that should sync to the Vendor automatically.

Secure (Mercury Network Admin)

Navigate to: Preferences → VMP Client Order Setup → Configure Status Mapping

1	**Navigate to Preferences → VMP Client Order Setup → Configure Status Mapping.**
2	**Review the five new UAD 3.6 statuses:** • 203015 – Product Order Detail Requested • 704100 – Review in Progress • 704103 – Review Completed
3	**Enable the sync toggle for each status you want mapped to VMP Client orders.**
4	**Save your configuration.**

✓ **You're done when:** All desired new UAD 3.6 statuses are mapped.

5.3 Status Mapping — Action Required Folder

Overview

The Action Required folder surfaces orders that need user attention. With the introduction of the Product Details Requested status, you can update this folder's configuration so your team is immediately alerted when a vendor submits a property details modification request.

Before you begin:

- ◻ VMP Client Status Mapping (5.2) is complete.

What you'll need:

- ◻ Decision on you want to catch the Product Order Detail Requested event in your Action Required folder.

Secure (Mercury Network Admin)

Navigate to: Order Management → Action Required folder → Gear icon

1	**Navigate to the Order Management screen.**
2	**Click the gear icon next to the Action Required folder.**
3	**Locate the new event: Product Details requested by vendor.** Enable this event to surface orders where an appraiser has submitted a property modification request — these require a decision before the order can proceed.
4	**Review and enable any other new events relevant to your workflow.**
5	**Set your day range (e.g., last 7 days).**
6	**Click Save.**

✓ **You're done when:** The Action Required folder is updated to surface Product Details Requested events. Your team will see these orders immediately when they need a decision.

Go-Live Checklist

Use this final checklist to confirm everything is in place before processing live UAD 3.6 orders.

Phase	Configuration Items (check off as you complete each one)
Phase 1 Foundation	☐ User Profiles ☐ Property Characteristics
Phase 2 Fees & Products	☐ Fee Administration ☐ Product Requirements ☐ Engagement Letter Content
Phase 3 Vendors & Clients	☐ Vendor Profiles ☐ Investor Submission Config ☐ Client Groups

Phase	Configuration Items (check off as you complete each one)
Phase 4 Workflow	☐ Critical Rule Firings ☐ Pending Release Status
Phase 5 Operational	☐ Reporting ☐ VMP Client Status Mapping ☐ Action Required Folder

Note: *Even after go-live, remember to monitor the UAD 3.6 readiness report in the Vendor section to track any appraisers who have not yet updated their profiles for UAD 3.6 eligibility. Subscribe to Cotality Release Notes to stay current on Advanced Investor Submission features (2026) and other upcoming updates.*

Questions? Contact your Cotality Client Delivery Manager or visit the Cotality Release Notes website.

Appendix A
Legacy Forms to UAD 3.6 Mapping Matrix™

This appendix is designed to help you navigate the transition from legacy static forms to the dynamic, data-driven UAD 3.6 reporting standard. This matrix is your primary reference for understanding how the new UAD 3.6 data points correspond to the legacy forms you use today. Use these sheets as a reference point for transitioning your fee structures, vendor eligibility, and more. Because UAD 3.6 is a dynamic data standard rather than a fixed "form," this sheet helps you bridge the gap between old-world appraisal reports and new-world data requirements.

How to use this appendix

Sheet 1 — Product Matrix:

Purpose: This matrix defines which collection of UAD 3.6 data points describes the scope of work represented by each legacy form today. Because UAD 3.6 is a dynamic data standard, the subject property and assignment characteristics now drive the report layout, rather than a static form number. This matrix defines which collection of UAD 3.6 data points describes the scope of work represented by each legacy form today.

- **Structure:**
  - **Rows:** Each row represents a specific data field (e.g., Property Type, Valuation Method, Construction method).
  - **Columns:** Each column represents a legacy form and UAD 3.6 product equivalent.
- **Configurations:** Reference this matrix when setting up the following in Mercury Network:
  - **Fees:** Ensure fee plans are using the correct UAD 3.6 data combinations.
  - **Vendor Eligibility:** Align your appraiser eligibility requirements with the specific datapoints that define the scope of the assignment.
  - **Order Form Requirements:** Standardize your Operating Procedures (SOPs) for order creation to ensure all necessary fields are captured upfront.
- **Important Note:** The GSEs (Fannie Mae and Freddie Mac) have moved away from legacy forms to allow for a more flexible scope of work. Because of this dynamic nature, there is not always a 1:1 correlation between legacy forms and the possible combinations of UAD 3.6 fields.

Sheet 2 — Mercury Product Mapping: This table maps the legacy Mercury product name to its equivalent UAD 3.6 property data points. This includes Property Valuation Method, Property Type, and any additional criteria needed (rent schedule, REO, investment, etc.).

Purpose: This table provides a direct lookup for a legacy Mercury Product Name to find its equivalent UAD 3.6 property data set.

Primary Use: This serves as your primary reference for developing your UAD 3.6 Fee Plan strategy and determining which vendors are eligible for specific UAD 3.6 assignments based on their profile and expertise.

Sheet 1 – Product Data Point Matrix

		Uniform Residential Appraisal Report	Individual Condominium Unit Appraisal Report	Mfg Home Appraisal	Small Residential Income Property	Individual Cooperative Interest Appraisal							
Legacy Form		**1004/70 URAR**	**1004 Desktop**	**1004 Hybrid**	**2055/20 Ext. Insp**	**1073/465 Cond**	**1073/ 465D Condo Desk**	**1073/465H Condo Hybrid**	**1075/466 Ext Cond**	**1004C/ 708 Mfg Home**	**1025/72 2-4 Unit**	**2090 COOP**	**2095 Ext. Coop**
UAD 3.6 Product		**Traditional Appraisal Single Family**	**Desktop Appraisal Single Family**	**Hybrid Appraisal Single Family**	**Exterior Appraisal Single Family**	**Traditional Appraisal Condominium**	**Desktop Appraisal Condominium**	**Hybrid Appraisal Condominium**	**Exterior Appraisal Condominium**	**Traditional Appraisal Mfg Home**	**Traditional Appraisal 2-4 Family**	**Traditional Appraisal Cooperative**	**Exterior Appraisal Cooperative**
Valuation Assignment Type (Mercury New: ValuationAssignmentType)													
	Construction / Cperm												
	DeedInLieu												
	HomeEquity / HELOC												
	LoanModification / Mod												
	Other / Other												
	PortfolioEvaluation												
	Preforeclosure / PreFor												
	Purchase / Purc	X	X	X	X	X	X	X	X	X	X	X	X
	Refinance / Refi	X	X	X	X	X	X	X	X	X	X	X	X
	REO / REOLS												
	ShortSale												
Mortgage Type (Mercury New: MortgageType)													
	Conventional	X	X	X	X	X	X	X	X	X	X	X	X
	FHA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	VA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	USDA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Other	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Property Usage Type (Mercury New: PropertyUsageType)													
	Primary / PR	X	X	X	X	X	X	X	X	X	X	X	X
	Secondary / SH	X	X	X	X	X	X	X	X	X	N/A	X	X
	Investment / INV	X	X	N/A	X	X	X	N/A	X	N/A	X	X	X

Legend

X	Applicable to this legacy form / UAD 3.6 product combination
N/A	Not applicable to this combination
	Not specified / dependent on order characteristics

Sheet 1 – Product Data Point Matrix *(continued)*

		Uniform Residential Appraisal Report	Individual Condominium Unit Appraisal Report	Mfg Home Appraisal	Small Residential Income Property	Individual Cooperative Interest Appraisal							
Legacy Form		1004/70 URAR	1004 Desktop	1004 Hybrid	2055/20 Ext. Insp	1073/465 Cond	1073/ 465D Condo Desk	1073/465H Condo Hybrid	1075/466 Ext Cond	1004C/ 708 Mfg Home	1025/72 2-4 Unit	2090 COOP	2095 Ext. Coop
UAD 3.6 Product		Traditional Appraisal Single Family	Desktop Appraisal Single Family	Hybrid Appraisal Single Family	Exterior Appraisal Single Family	Traditional Appraisal Condominium	Desktop Appraisal Condominium	Hybrid Appraisal Condominium	Exterior Appraisal Condominium	Traditional Appraisal Mfg Home	Traditional Appraisal 2-4 Family	Traditional Appraisal Cooperative	Exterior Appraisal Cooperative
Property Valuation Method Type													
	DesktopAppraisal	N/A	X	N/A	N/A	N/A	X	N/A	N/A	N/A	N/A	N/A	N/A
	ExteriorAppraisal	N/A	N/A	N/A	X	N/A	N/A	N/A	X	N/A	N/A	N/A	X
	HybridAppraisal	N/A	N/A	X	N/A	N/A	N/A	X	N/A	N/A	N/A	N/A	N/A
	TraditionalAppraisal	X	N/A	N/A	N/A	X	N/A	N/A	N/A	X	X	X	N/A
Order Type (Mercury New: Order Type)													
	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR	URAR
Property Type (Mercury New: PropertyType / NeighborhoodHousingType)													
	SingleFamily	X	X	X	X	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Two to Four Family	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X	N/A	N/A
	Condominium	N/A	N/A	N/A	N/A	X	X	X	X	N/A	N/A	N/A	N/A
	Manufactured Home	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X	N/A	N/A	N/A
	Cooperative	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X	X
	Other												
Project Legal Structure Type													
	Cond				X	X	X	X	X4	X	N/A	N/A	
	Coop	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X4	X	X	X
	Condop	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X	X
PUD Indicator													
	Yes / NX3	X3	X3	X3	N/A	N/A	N/A	N/A	X4	N/A			
Attachment Type													
	Attached	N/A	N/A	N/A	N/A	X	X	X	X	X	X	X	X
	Detached	X	X	X	X	X	X	X	X	X	N/A	X	X
Land Owned in Common Indicator (*Only applies to detached condos)													
	Boolean – Yes or No	Yes[2] or No	Yes[2] or No	Yes[2] or No	Yes[2] or No	Yes	Yes	Yes	Yes	Yes or No	Order	Yes	Yes

Sheet 1 – Product Data Point Matrix *(continued)*

		Uniform Residential Appraisal Report	Individual Condominium Unit Appraisal Report	Mfg Home Appraisal	Small Residential Income Property	Individual Cooperative Interest Appraisal							
Legacy Form		**1004/70 URAR**	**1004 Desktop**	**1004 Hybrid**	**2055/20 Ext. Insp**	**1073/465 Cond**	**1073/ 465D Condo Desk**	**1073/465H Condo Hybrid**	**1075/466 Ext Cond**	**1004C/ 708 Mfg Home**	**1025/72 2-4 Unit**	**2090 COOP**	**2095 Ext. Coop**
UAD 3.6 Product		**Traditional Appraisal Single Family**	**Desktop Appraisal Single Family**	**Hybrid Appraisal Single Family**	**Exterior Appraisal Single Family**	**Traditional Appraisal Condominium**	**Desktop Appraisal Condominium**	**Hybrid Appraisal Condominium**	**Exterior Appraisal Condominium**	**Traditional Appraisal Mfg Home**	**Traditional Appraisal 2-4 Family**	**Traditional Appraisal Cooperative**	**Exterior Appraisal Cooperative**
Accessory Dwelling Unit (ADU) Total Count													
	ADU Count: total structures on property with a living unit (excl. outbuildings)	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1	0 or 1
Living Unit Excluding ADU Count													
	Number of living units in subject property, excluding ADUs	1	1	1	1	1	1	1	2	1	2, 3, or 4	1	1
Construction Method Type													
	Container	X	X	X	X	X	X	X	X	N/A	X	X	X
	Manufactured	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X	N/A	N/A	
	Modular	X	X	X	X	X	X	X	X	N/A	X	X	X
	OnFrameModular	X	X	X	X	X	X	X	X	N/A	X	X	X
	SiteBuilt	X	X	X	X	X	X	X	X	N/A	X	X	X
	3D Printing Technology	X	X	X	X	X	X	X	X	N/A	X	X	X
	Other												
Rent Schedule Indicator													
	Boolean — Yes or No	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	X[5]	N/A	N/A

Footnotes

1 Utilize Loan Purpose to define Single Family using SFR (Attached) or SFRD (Detached).
2 Land Owned in Common only applies to detached condos.
3 Utilize PUD Indicator to indicate a Single Family structure is located in a PUD.
4 Utilize if a Manufactured Home is in a Condo, Co-op, or PUD.
5 Utilize Rent Schedule Indicator when rental income is required to qualify for the mortgage (replaces 1007).

Sheet 2 – Mercury Product Mapping

Mercury Legacy Product Name	UAD 3.6 Valuation Method	UAD 3.6 Property Type	Legacy Form	Additional Criteria
Co-op Appraisal (FNMA 2090)	Traditional Appraisal	Cooperative	2090	Add conventional mortgage type
Co-op Investment (2090, 1007, and 216)	Traditional Appraisal	Cooperative	2090	Add rent schedule indicator; add conventional mortgage type
Co-op Investment w/ Comparable Rent Schedule (2090 and 1007)	Traditional Appraisal	Cooperative	2090	Add rent schedule indicator; add conventional mortgage type
Co-op Investment w/ Operating Income Statement (2090 and 216)	Traditional Appraisal	Cooperative	2090	
Exterior Only Co-op Appraisal (FNMA 2095)	Exterior Appraisal	Cooperative	2095	
Uniform Residential Appraisal (FNMA 1004)	Traditional Appraisal	Single Family	1004/70	
FHA Appraisal (FNMA 1004)	Traditional Appraisal	Single Family	1004/70	
HomeStyle Renovation (FMNA 1004)	Traditional Appraisal	Single Family	1004/70	
Single Family Investment (1004, 1007, and 216)	Traditional Appraisal	Single Family	1004/70	Add rent schedule
Single Family Investment w/ Comparable Rent Sch (1004 and 1007)	Traditional Appraisal	Single Family	1004/70	Add rent schedule
Single Family Investment w/ Operating Income Statement (1004 and 216)	Traditional Appraisal	Single Family	1004/70	
Uniform Residential Appraisal Report (1004 + 1007 ADU Only)	Traditional Appraisal	Single Family	1004/70	Add rent schedule; add ADU
Uniform Residential Appraisal w/ REO (FNMA 1004)	Traditional Appraisal	Single Family	1004/70	Add REO in Valuation Assignment Type
Uniform Residential Appraisal Report Desktop (1004 Desktop/70D)	Desktop Appraisal	Single Family	1004/70	
Uniform Residential Appraisal Report Hybrid (1004 Hybrid/70H)	Hybrid Appraisal	Single Family	1004 Hybrid/70H	
Uniform Residential Appraisal Report Hybrid (70 Hybrid)	Hybrid Appraisal	Single Family	1004 Hybrid/70H	
Drive by Appraisal (Legacy 2055)	Exterior Appraisal	Single Family	2055/20	
Exterior Only Residential Report (FNMA 2055)	Exterior Appraisal	Single Family	2055/20	
Exterior Only Residential Report w/ Comparable Photos (FNMA 2055)	Exterior Appraisal	Single Family	2055/20	
Exterior Only Residential Report w/ REO (FNMA 2055)	Exterior Appraisal	Single Family	2055/20	Add REO in Valuation Assignment Type
Exterior Only Investment (2055, 1007, and 216)	Exterior Appraisal	Single Family	2055/20	Add rent schedule indicator
Exterior Only Investment w/ Comparable Rent Schedule (2055 and 1007)	Exterior Appraisal	Single Family	2055/20	Add rent schedule indicator
Manufactured Home (FNMA 1004C)	Traditional Appraisal	Manufactured Home	1004/78	
Manufactured Home Investment (FNMA 1004C, 1007, and 216)	Traditional Appraisal	Manufactured Home	1004/78	Add investment in Property Usage; add rent schedule
Manufactured Home Investment w/ Comparable Rent Schedule (FNMA 1004C and 1007)	Traditional Appraisal	Manufactured Home	1004/78	Add investment in Property Usage; add rent schedule
FHA Manufactured Home (FNMA 1004C)	Traditional Appraisal	Manufactured Home	1004C/708	Add investment in Property Usage; add rent schedule
FHA Manufactured Home Investment (FNMA 1004C, 1007, and 216)	Traditional Appraisal	Manufactured Home	1004C/708	Add investment in Property Usage; add rent schedule
FHA Manufactured Home Investment w/ Comparable Rent Schedule (FNMA 1004C & 1007)	Traditional Appraisal	Manufactured Home	1004C/708	Add investment in Property Usage; add rent schedule
FHA Manufactured Home Investment w/ Operating Income Statement (FNMA 1004C & 216)	Traditional Appraisal	Manufactured Home	1004C/708	
FHA Manufactured Home Reverse Mortgage (FNMA 1004C)	Traditional Appraisal	Manufactured Home	1004C/708	Add Reverse Mortgage Property Characteristic

Sheet 2 — Mercury Product Mapping *(continued)*

Mercury Legacy Product Name	UAD 3.6 Valuation Method	UAD 3.6 Property Type	Legacy Form	Additional Criteria
Multi-Family Appraisal (FNMA 1025)	Traditional Appraisal	Two to Four Family	1025/72	
Multi-Family Appraisal w/ REO (FNMA 1025)	Traditional Appraisal	Two to Four Family	1025/72	Add REO in Valuation Assignment Type
Multi-Family FHA 203k (FNMA 1025)	Traditional Appraisal	Two to Four Family	1025/72	
Multi-Family Investment (FNMA 1025 and 216)	Traditional Appraisal	Two to Four Family	1025/72	
Exterior Only Multi-Family Appraisal (FNMA 1025)	Exterior Appraisal	Two to Four Family	1025/72	
Multi-Family Exterior Only (205GMF)	Exterior Appraisal	Two to Four Family	2055/20	
Condo Appraisal (FNMA 1073)	Traditional Appraisal	Condominium	1073/465	Add conventional mortgage type
Condo Investment (1073, 1007, and 216)	Traditional Appraisal	Condominium	1073/465	Add investment in Property Usage
Condo Investment w/ Comparable Rent Sch (1073 and 1007)	Traditional Appraisal	Condominium	1073/465	Add investment in Property Usage; add rent schedule indicator
Condo Investment w/ Operating Income Statement (1073 and 216)	Traditional Appraisal	Condominium	1073/465	Add investment in Property Usage
Condo Appraisal (1073 Desktop)	Desktop Appraisal	Condominium	1073/465D	Add conventional mortgage type
Condo Appraisal (1073 Hybrid)	Hybrid Appraisal	Condominium	1073/465H	Add conventional mortgage type
Exterior Only Condo Appraisal (FNMA 1075)	Exterior Appraisal	Cooperative	1075/466	
Exterior Only Condo Appraisal w/ REO (FNMA 1075)	Exterior Appraisal	Cooperative	1075/466	Add REO in Valuation Assignment Type
Exterior Only Condo Investment (1075, 1007, and 216)	Exterior Appraisal	Cooperative	1075/466	Add investment in Property Usage; add rent schedule
Exterior Only Condo Investment w/ Comparable Rent Schedule (1075 and 1007)	Exterior Appraisal	Cooperative	1075/466	Add investment in Property Usage; add rent schedule
Appraisal Update / Recertification (FNMA 1004D)	Completion Report or Restricted Appraisal Update		1004D	
Appraisal Update / Inspection of Repairs (FNMA 1004D)	Completion Report or Restricted Appraisal Update		1004D	
Appraisal Update / Inspection of Repairs & Recertification Report (FNMA 1004D)	Completion Report or Restricted Appraisal Update		1004D	

Appendix B
UAD 3.6 Fee Management

What's Changing with Fees?

Today, vendor fees are calculated based on multiple data points, with the appraisal form number being a primary factor. With UAD 3.6, the industry is transitioning away from using individual appraisal form numbers as a foundation for defining the scope of work for vendor fee calculation. Instead, we will use updated data requirements to understand the property characteristics. The data that describes the subject property drives the appraisal report, not a form. As a result, we must revisit how vendor fees are configured and calculated within our fulfillment platforms.

Moving From a Form-Centric Fulfillment Process to a Data-Centric Process

Several new data points work together to describe the scope of work in place of an appraisal form number. These new fields have been added to the order creation API and the manual order forms.

Single Family 1004/70

- URAR
- Assignment Method
- Units Excluding ADU's: 1
- Site owned in common: No
- Property Project: No
- Project legal structure: No
- Construction method: Not Manufactured

Manufactured 1004C/70B

- URAR
- Assignment Method
- Units Excluding ADU's: 1
- Site owned in common: No
- Property Project: No
- Project legal structure: No
- Construction method: Is Manufactured

Manufactured 1004C/70B

- URAR
- Assignment Method
- Units Excluding ADU's: 1
- Site owned in common: Yes
- Property Project: Yes
- Project legal structure: Condo
- Construction method: Not Manufactured

Replacing Form Numbers as a Component of Fee Plans

To support UAD 3.6 orders, CMS® and Mercury Network have designed a set of "Products" to provide clients with a baseline to start from, like the list of form types/services you use today for legacy forms.

Two of the primary UAD 3.6 data points, Property Valuation Method and Property Type, provide the basis for our UAD 3.6 product list.

- Desktop Appraisal - Single Family
- Desktop Appraisal - Two to Four Family
- Desktop Appraisal - Condominium
- Desktop Appraisal - Manufactured Home
- Desktop Appraisal - Cooperative
- Desktop Appraisal - Other
- Exterior Appraisal - Single Family
- Exterior Appraisal - Two to Four Family
- Exterior Appraisal - Condominium
- Exterior Appraisal - Manufactured Home
- Exterior Appraisal - Cooperative
- Exterior Appraisal - Other

- Hybrid Appraisal - Single Family
- Hybrid Appraisal - Two to Four Family
- Hybrid Appraisal - Condominium
- Hybrid Appraisal - Manufactured Home
- Hybrid Appraisal - Cooperative
- Hybrid Appraisal - Other
- Traditional Appraisal - Single Family
- Traditional Appraisal - Two to Four Family
- Traditional Appraisal -Condominium
- Traditional Appraisal - Manufactured Home
- Traditional Appraisal - Cooperative
- Traditional Appraisal - Other
- Restricted Appraisal Update
- Completion Report

Fees Management Within the Mercury Platform

Our new Fees Module lets you save fee schedules that the system will use to automatically calculate the correct fees for each order. You can enter fees paid to service providers and fees charged to customers here, and then configure the system to apply these fees based on product type, geographic location, assigned vendor, client/client group, and other order characteristics.

Fee & Price Plans serve as **default fee schedules** that the system uses to automatically calculate the correct fee for an order. Mercury Network breaks fees into two main types:

- **Vendor Fee:** The amount paid to a service provider, such as an appraiser or Appraisal Management Company (AMC), for their work.
- **Customer Prices:** The fee that is charged to the broker or loan officer, or the interdepartmental charge for the appraisal department's services.

Fee plans can be created using a bulk spreadsheet upload or manually through the fee module user interface. The bulk upload process will be available first, with the manual plan creation made available shortly after.

When the system calculates the fee for an order, it looks up the plan that applies to that product, in that geographic area, for that client/client group, and then calculates the fee. The total vendor fee for an order is calculated by adding the base fee + any applicable add-on fees.

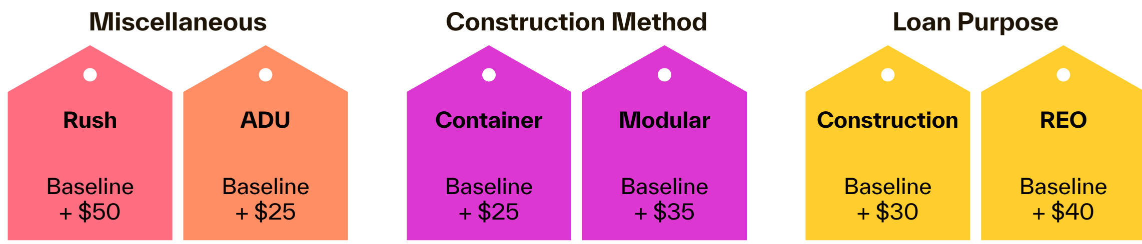
For Example*:

Product: Traditional Appraisal - Single Family in Dayton, OH

Base Fees:

Tier 1 ($0 – $XXX,XXX)	Tier 2 ($XXX,XXX – $XXX,XXX)	Tier 3 ($XXX,XXX – Infinity)
$100	$150	$200

Additional Fees*:



* **These fee amounts are for illustrative purposes only.**

Customers who currently differentiate certain order characteristics by product will need to use additional data points for UAD 3.6 orders. For example:

Today, you order a 1004 with 1007 product for a legacy form appraisal.

For UAD 3.6 you place an order with a **Valuation Method** of Traditional Appraisal, **Property Type** of – Single Family, and **Rent Schedule Indicator** field set to on/yes. The fee will be calculated as the base fee for a Traditional Appraisal – Single Family product plus the add-on fee for the rent schedule.

Customers may use the **Property Characteristics** field to create custom characteristics that differentiate fees and are not accounted for in any of the standard order fields.

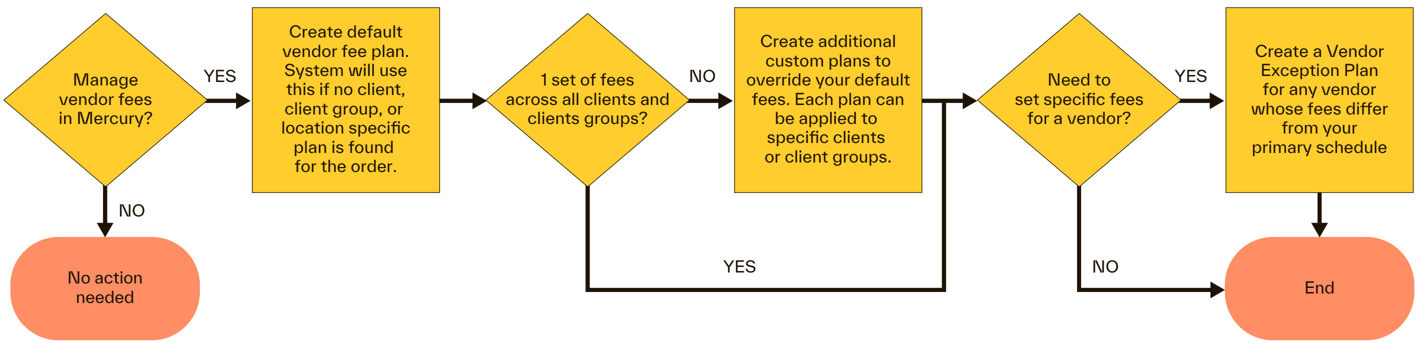
Which order data points can be used for add-on fees?

- UAD 3.6 Fee Plans have the following add-on fee options:
  - Rush
  - Construction Method Type
  - PUD Indicator
  - Land Owned in Common
  - Living Unit Excluding ADU Count
  - ADU Count
  - Rent Schedule Indicator
  - Mortgage Type
  - Property Usage Type
  - Valuation Assignment Type
  - Property Characteristics

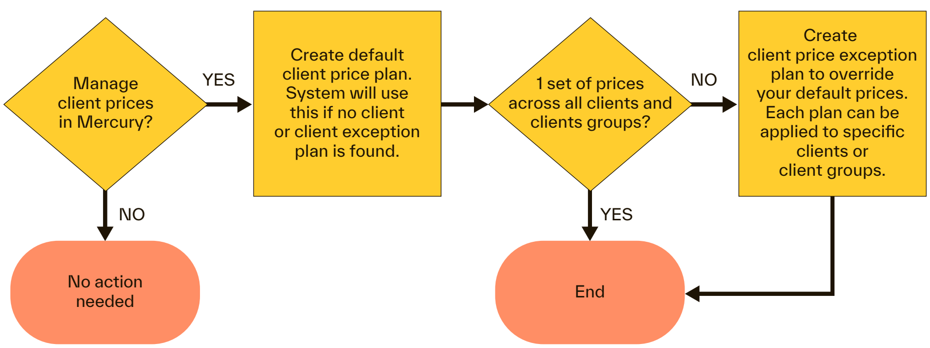
Creating Fee and Price Plans

1	Define Complexity Tiers
2	Vendor Fee Plans
3	Client Price Plans

What kind of vendor plans do I need?



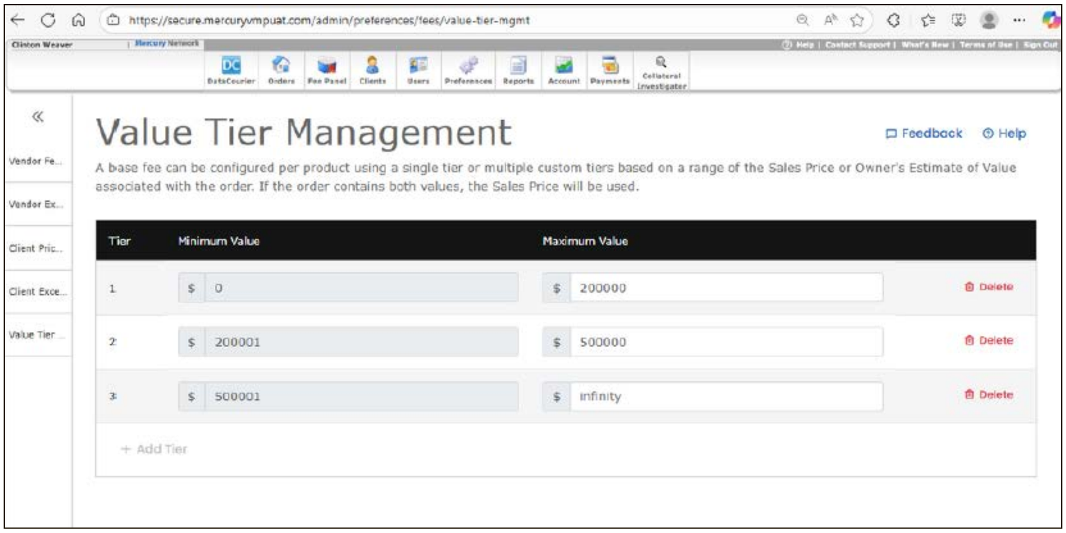
What kind of client price plans do I need?



Defining Complexity Tiers

Before you set up any manual fee or price plans, you need to define your organization's complexity tiers. Complexity tiers are defined based on the property's Sales Price or Owner's Estimate of Value.

When you create a fee plan, you will define a base fee/price for each product. If base fees vary by property complexity, you can define multiple base fees per product using complexity tiers.



Fee Plan Method Definitions

1. **Use vendor default fees** – Uses the assigned provider's standard rates as configured in their vendor profile.
2. **Set fees as a percentage of the client price** – Calculates fees based on a percentage of the client fee that is calculated for the order. To utilize this approach, you must establish a Client Price Plan.
3. **Manually add fees** – Allows the user to specify custom fees for different kinds of orders. User will need to enter base fees and add-on fees for all applicable products and geographies.

Default Vendor Fee Plan Definition

What is a Default Plan? This is your "catch-all" fee schedule. It applies to all clients and client groups unless an additional plan specific to the order's client or client group exists. To ensure seamless processing, it should cover all products and regions within your service area.

Fee/Price Plan Template Definitions

Vendor Fees

The amount paid to the vendor for a specific order. It is calculated from the assigned Fee Plan on the order's details.

Vendor Fees Template – Clients: For fee fee plans using "Use vendor fees" or "Use % of customer fee" methods. Designed for client-specific fee plan configurations. Users must populate the product, geographic locations, and the specific clients the plan applies to.

Vendor Fees Template – Client Groups: For fee plans using "Use vendor fees" or "Use % of customer fee" methods. Designed for client group-specific fee plan configurations. Users must populate the product, geographic locations, and the specific client groups the plan applies to.

Vendor Fees Template – Advanced with Clients: For fee plans using “Manually Add Fees” method. Designed for client-specific fee plan configurations. Users must populate the product, geographic locations, bse fees, add-on fees, and the specific clients the plan applies to.

Vendor Fees Template – Advanced with Client Groups: For fee plans using “Manually Add Fees” method. Designed for clent group-specific fee plan configurations. Users must populate the product, geographic locations, base fees, add-on fees, and the specific client groups the plan applies to.

Vendor Exception Fees

Fees paid to a vendor that override the standard Fee Plan. Use these for vendor-specific fee configurations; they apply to orders assigned to the specified vendors.

Vendor Exception Fees Template: For exception fee plans using “Use vendor fees” or “Use % of customer fee” methods. Users must populate the product, geographic locations, and the specific vendors the plan applies to.

Vendor Exception Fees Template – Advanced: For exception fee plans using “Manually Add Fees: method. Users must populate the product, geographic locations, base fees, add-on fees, and the specific vendors the plan applies to.

Client Prices

The specific amount calculated for an order and charged to the customers. This value is derived from teh assigned Price Plan based on teh order details.

Client Prices Template – Advanced: For price plans that apply to all clients and client groups. Users must populate the product, geographic locations, base prices, and add-on fees.

Client Exception Prices

Prices charged to a customer that override the standard Client Price Plan. Use these for client- or client group-specific pricing configurations; they apply to orders assigned to the specified clients or client groups.

Client Exception Prices Template – Clients: For price plans using that apply to all clients and client groups. Users must populate the product, geographic locations, base prices, add-on fees, and the specific clients the plan applies to. For exception price plans that apply to specific clients. Users must populate the product, geographic loacations, base prices, add-on fees, and teh specific clients the plan applies to.

Client Exception Prices Template – Client Groups: For price plans using that apply to all clients and client groups. Users must populate the product, geographic locations, base prices, add-on fees, and the specific clients the plan applies to. For exception price plans that apply to specific lients. Users must populate the product, geographic locations, base prices, add-on fees, and the specific client groups the plan applies to.

Will Cotality Assist Us In Configuring UAD 3.6 Fee Plans?

We acknowledge the burden of creating new fee plans for UAD 3.6 products during this industry-wide transition, especially when the methodology is likely to stay similar to your current fee plans for legacy forms. We are committed to helping automate these updates when possible. During your UAD 3.6 migration, you will be presented with a mapping document that describes how we are mapping legacy form numbers to a collection of UAD 3.6 data points. In as many cases as possible, we will automatically create fee plan templates for your UAD 3.6 products and geography combinations based on this mapping. You can then populate fees and review those fee plans to confirm they meet their needs and make any necessary adjustments.

Impacts to Legacy Forms Fees

Fees for legacy forms will remain in place and continue to be managed as they are today. Existing fee configuration options will only impact legacy forms fees, and will not impact UAD 3.6 order fees. It is on our roadmap to migrate fee management for legacy forms to the new fee module.

About Cotality

Cotality accelerates data, insights, and workflows across the property ecosystem to enable industry professionals to surpass their ambitions and impact society. With billions of real-time data signals across the life cycle of a property, we unearth hidden risks and transformative opportunities for agents, lenders, carriers, and innovators.

For more information, please visit www.cotality.com

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