

Valuation Modernization

Mercury Network Implementation Overview v1.2

Why do our Valuation Platforms Need to be Updated?

- The new dynamic Appraisal URAR moves us from a form-centric fulfillment process to a data-centric process, where data that describes the subject property drives the appraisal report, not a form.
- Many of the features and functions in our valuation platforms today differentiate behavior by appraisal form number.
- The MISMO XML structure, which contains all appraisal data points, is changing from version 2.6 to version 3.6, resulting in a new set of data points and corresponding validations. The UAD 3.6 accepted appraisal file format will not be an .ENV or MISMO XML file, but instead a UAD 3.6 Zip file that contains MISMO 3.6 XML, photos, and the appraisal PDF.
- Each platform will be integrated with the new UCDP portal for UAD 3.6.
- Our automated rules and review solution will be redesigned for UAD 3.6 appraisals.

[Click here to subscribe](#) to receive release notes and announcements in your email inbox. Stay up-to-date on feature release dates for both UAT and Production at our [Cotality Release Notes](#) website.

Impacted Features and Functions

This information is subject to change as we continue to update Mercury Network. A document version history is available at the end of this document.

Tag Definitions

Ready in UAT	These items are ready in UAT (after UAT testing opens in February 2026)
Configuration	These items require configuration for UAD 3.6 order fulfillment, and will be included in the UAD 3.6 migration plan.

Note: UAD 3.6 updates do not impact legacy forms (current state) process flow. Mercury will continue to support the legacy forms process flow as it is today.

Place Order

As we transition away from appraisal form numbers, we will rely instead on several property characteristics to define the scope of work. To achieve this, we have updated the data points captured at order creation and added new APIs to support additional features such as Property Details Collaboration.

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

Two of the primary UAD 3.6 data points —Property Valuation Method and Property Type —serve as the basis for our UAD 3.6 appraisal product list. This list also includes the Completion Report and Restricted Appraisal Update reports.

- **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**
- **Completion Report**
- **Restricted Appraisal Update**

We have also introduced a new concept that allows us to link orders for the same loan together. When a second order is placed for the same loan (a second appraisal for a jumbo loan or a Completion report, for example), customers will provide the Mercury platform with the Tracking ID or Tracking Number for the first “parent order”. This enables Mercury to connect these orders so they are all visible in one place during UCDP submission.

Note: UAD 3.6 Completion reports and Update reports can only be placed as child orders; the parent appraisal's Tracking ID or Tracking Number is required.

LOS API

Ready in UAT

There are several components involved in this process (order placement, order updates, communication between the LOS and the platform throughout the lifecycle, and the new product collaboration feature, among others). An updated API guide is now available, highlighting the primary areas of change:

Lenders /
LOS



New Order Request



Order Update and Changes

Product Order Detail Collaboration



Order Collaboration Decision

File Upload (Appraisal)

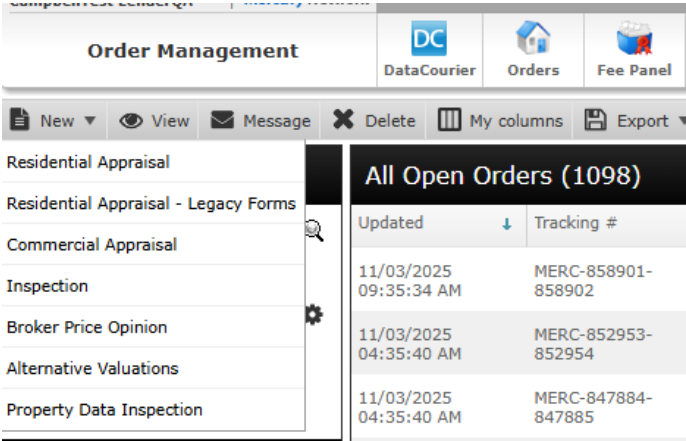


File upload (Appraisal)

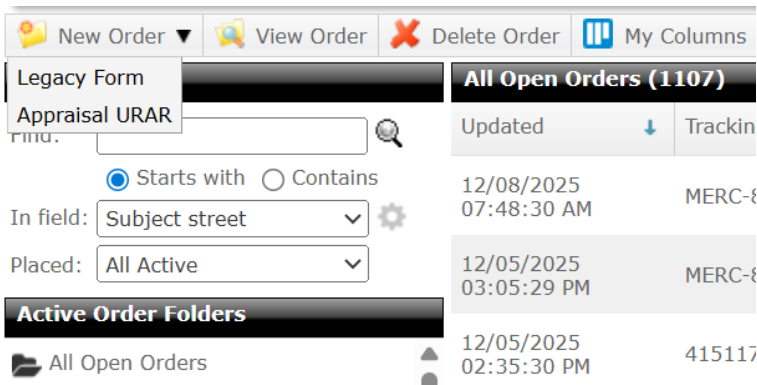
Providers
&
Third Party
Systems

When placing a manual order, Mercury users will now select whether the order pertains to a legacy form or a UAD 3.6 URAR/Completion Report/Update Report.

On Secure: To place a UAD 3.6 order, users should choose **Residential Appraisal**. Alternatively, selecting **Residential Appraisal - Legacy Forms** displays the existing manual form for placing a legacy appraisal order.



On VMP Client: To place a UAD 3.6 order, users should choose **Appraisal URAR**. Alternatively, selecting **Legacy Form** displays the existing manual form for placing a legacy appraisal order.



When **Residential Appraisal/ Appraisal URAR** is selected, a new order form will appear with additional fields needed to place your order. These new UAD 3.6 fields are designed to outline the scope of work as we transition away from legacy appraisal forms.

You'll notice a few important changes:

- There is no **Form/type** selection in the Assignment Information section. For UAD 3.6 orders, the product is derived from the **Valuation Assignment Method** and **Property Type** fields located in the Property Information section. Standard UAD 3.6 products are listed at the beginning of this document.

Property type* (None Selected)
Prop Attachment (None Selected)
Project Legal Structure (None Selected)
Construction Method (None Selected)
Living Unit*
Excluding ADU
ADU Count
PUD ☐
Land Owned in Common ☐
Directions
Characteristics ☐ Golf Course ☐ Rural Area
☐ test 1 ☐ Test 2

Property* (None Selected)
Valuation Method

- There are several new fields added to the order form to describe the property characteristics:
 - Prop Attachment
 - Property Type
 - Living Unit Excluding ADU
 - Property Valuation Method
 - Project Legal Structure
 - ADU Count
 - Construction Method
 - Rent Schedule Indicator
 - PUD Indicator
 - Land Owned in Common Indicator
 - Property Usage
 - Order Type
 - Mortgage Type
 - Valuation Assignment Type
 - Parent Tracking Number

Secure:

Required fields are indicated. Please complete as much order information as possible.

Next

Property information

Address *		Property type *	(None Selected)
Unit type	None Selected	Prop Attachment	(None Selected)
City *		Project Legal Structure	(None Selected)
State *	(None Selected)	Construction Method	(None Selected)
Zip code *		Living Unit Excluding ADU *	
County		ADU Count	
Sq ft		PUD	☐
Site size		Land Owned in Common	☐
Prop rights	(None Selected)	Directions	
Legal desc		Characteristics	☐ Golf Course ☐ Rural Area ☐ test 1 ☐ Test 2
Property Usage *	(None Selected)		

Assignment information

☐ Rush Order		Property *	(None Selected)
☐ Complex		Valuation Method	
Order Type *	(None Selected)	Loan # *	
Mortgage Type *	(None Selected)	Parent Tracking Number	
Valuation *	(None Selected)	File #	
Assignment Type *		Sales price	
Vendor due *		FHA case #	
Closing date		DU Case File ID	
Other ref #		LPA Key	
Ordered by		Disclosure	
Order group	Edit order groups	Assigned to	CampbellTest LenderQA
Inspection type	(None Selected)	Value conditions	☐ As is ☐ As stabilized ☐ As completed ☐ Retrospective
Rent Schedule	☐		

VMP Client:

Next

Fields with red asterisks (*) next to them are required. However, please fill out as much information as possible. Doing so will eliminate delays caused by us having to contact you for additional information.

Order Type *	(None Selected)	Client Group	(None Selected)
Intent to Proceed	☐	Received Date	
Early appraisal consent	☐	Closing Date	
Property Information			
Address *		Property Type *	(None Selected)
Unit Type	None Selected	Prop Attachment	(None Selected)
City *		Project Legal Structure	(None Selected)
State *	(None Selected)	Construction Method	(None Selected)
Zip Code *		Living Unit Excluding ADU *	
Prop Rights	(None Selected)	ADU Count	
Legal Desc		PUD	☐
Property Usage *	(None Selected)	Land Owned in Common	☐
Site Size		Directions	
		Characteristics	☐ Dream ☐ Dreams ☐ Golf Course ☐ it twas the night BF ☐ Rural Area ☐ test 1 ☐ Test 2 ☐ None
Assignment Information			
Due Date *	12/17/2025	Order Mode *	☒ Appraisal Order ☐ Quote Request
Other Ref #		Loan #	
Property Valuation Method *	(None Selected)	Parent Tracking Number	
Mortgage Type *	(None Selected)	File #	
Valuation Assignment Type *	(None Selected)	Sales Price	
Ordered By		Loan Amount	
Account Exec.	(None Selected)	Estimated Value	
Disclosure Date		FHA #	
Rent Schedule	☐	DU Case File ID	
		LPA Key	
		Value Conditions	☐ As is ☐ As stabilized ☐ As completed ☐ Retrospective

There are also several fields present on the legacy forms order form but absent from the UAD 3.6 **Residential Appraisal/Appraisal URAR** order form. Several of these fields are replaced with fields that house similar information.

- Form/type
- Loan Type
- Loan Purpose
- Prop Type
- Occupancy

VMP Client: **Order Type** has been renamed to **Order Mode** on the **Appraisal URAR** order form. There is a new field called **Order Type**, which captures different information.

Quote Request

Specific changes are TBD.

Review-Only Order

Specific changes are TBD.

Prepare Order Features

Today, many workflow configurations within the platform are based on the appraisal form number. These configurations now incorporate UAD 3.6 property characteristics data points, which will dictate how specific orders with specific characteristics behave.

Fee management in Mercury has been upgraded, allowing users with appropriate permissions to create and manage complex fee plans directly in the user interface. At this time, the new module is used only to manage UAD 3.6 fee plans; however, it is on the roadmap to extend the module to manage legacy form fees as well. These plans will be handled separately to accommodate distinct configuration data points for each. Clients will establish UAD 3.6 fee plans using a forms matrix that maps legacy forms to a specific set of UAD 3.6 data points.

Please see Appendix A for additional details.

«

Vendor Fe...

Vendor Ex...

Client Pric...

Client Exce...

Value Tier ...

Vendor Fee Plans

Fee plans allow you to pre-set the recommended fees paid to the vendor for any geographical area for any service.

Fee Plans ⓘ

Plan Name ⬆	# of
4Case4MilitaryFees	1
fixing issue1	0

Vendor Selection Settings
Customize the Intelligent Selection System rules for selecting vendors and whether to use double-blind communication.

Product Requirements
Specify custom instructions to your vendors, required forms, vendor license designations, and add documents to send to your vendors each time a product is ordered.

Connection Settings
Set up account information to enable direct connections with other software companies and portals, such as UCDP.

Review Settings
Configure settings to personalize the review tools to fit your company's needs.

VMP Client Order Setup
Configure your online order form, your products and fee tables, your compliance certificate, and other items specific to your VMP Client order form.

Fees
Configure your vendor fees and client prices, all in one flexible module. Applies to UAD 3.6 products only.

«

Vendor Fe...

Vendor Ex...

Client Pric...

Client Exce...

Value Tier ...

Vendor Fee Plans

Fee plans allow you to pre-set the recommended fees paid to the vendor for any geographical area for any service.

Fee Plans ⓘ

History Log

Create New Plan

Plan Name ⬆	Status ⬆	# of Clients ⬆	# of Client Groups ⬆	
4Case4MilitaryFees		0	1	View FeesDelete
testint6041c	⚙	0	0	View FeesDelete
testint6041b	⚙	0	0	View FeesDelete
testint6041	⚙	0	0	View FeesDelete
sidplan3july64		1	0	View FeesDelete

Feedback

Help

Product Requirements under the Preferences menu has been updated to split residential appraisals into two tabs, **Residential Appraisal** (UAD 3.6 products) and **Residential Appraisal - Legacy Forms**. The **Residential Appraisal** tab list differs from the current screen in two ways:

- It does not display the fee because it is no longer stored in the Product Requirements module, and the fee calculation extends beyond the product.
- It does not allow you to show/hide products on the order form. UAD 3.6 products are derived from a combination of order data points and are not represented by one field on the order form.

While the configurations for legacy forms will remain unchanged, preferences for UAD 3.6 products must be configured during a client's UAD 3.6 migration. The **Product Requirements** screen at the individual UAD 3.6 product level looks a little different from the legacy forms:

- The **Required Forms** section is not available for UAD 3.6 products because the requirements will be primarily dictated by the scope of work defined for the service provider and the applicable sections on the new URAR dynamic appraisal form.
- The **Designations** section is unchanged.
- The **Order Options** section no longer has a place to enter fees; UAD 3.6 fees are managed in the Preferences → Fees module.

Completion Report

Comments / Special Instructions

Enter any comments or special instructions you would like the vendor to see. Instructions you enter here will be sent with every order for this type of product.

Designations

☒ Do not use.

☐ Prefer vendors with this license or designation.

☐ Require vendors to have this license or designation.

☒ Certified General Appraiser License

☐ Certified Residential Appraiser License

☐ Licensed Residential Real Estate Appraiser

☐ Provisional Real Estate Appraiser License

☐ Appraiser Trainee

☐ FHA Roster

☐ General Accredited Appraiser (GAA)

☐ Residential Accredited Appraiser (RAA)

☐ Member Appraisal Institute (MAI)

☐ Senior Residential Appraiser (SRA)

☐ IFA

☐ Green Trained Appraiser

☐ Solar Trained Appraiser

Use of designation requirements should be used with caution. Choosing to require vendors to have particular designations when placing orders for this product will cause the system to ignore any vendors who has not specified that they have this

Order Options

Attached Documents

Drop files to attach, or

Upload documents

Statement of Engagement

(None Selected)

My Product Fee

To see your fees, please navigate to Preferences -> Fees

Salient Information

☐ Request salient info on completion.

Assignment Options

☐ Double-blind Communication

Conceal the identities of all parties in the ordering transaction and restrict all communication between the parties to pre-written text.

☐ Automatic Vendor Selection

Uses configured Intelligent Selection Settings (ISS) to automatically select a vendor during order assignment.

☐ Unattended Order Assignment

VMP orders will be assigned to a vendor automatically, eliminating all manual involvement from the assignment process.

☐ Unattended Order Reassignment

Automatically reassign expired and declined orders using ISS rules.

☐ Stop and notify me after 3 attempts.

If you typically assign orders to an AMC, not all of these options will apply. However, we recommend you set your preferences in the event you assign an order to an appraiser instead of an AMC.

Engagement Letter Content

Configuration

Ready in UAT

Legacy forms and UAD 3.6 products have different data points available within the order, and the scope of work is described differently. For this reason, customers must maintain separate engagement letter templates for each type of order. Mercury Network now has a separate default Engagement Letter template for UAD 3.6 orders in addition to the existing default template for legacy forms.

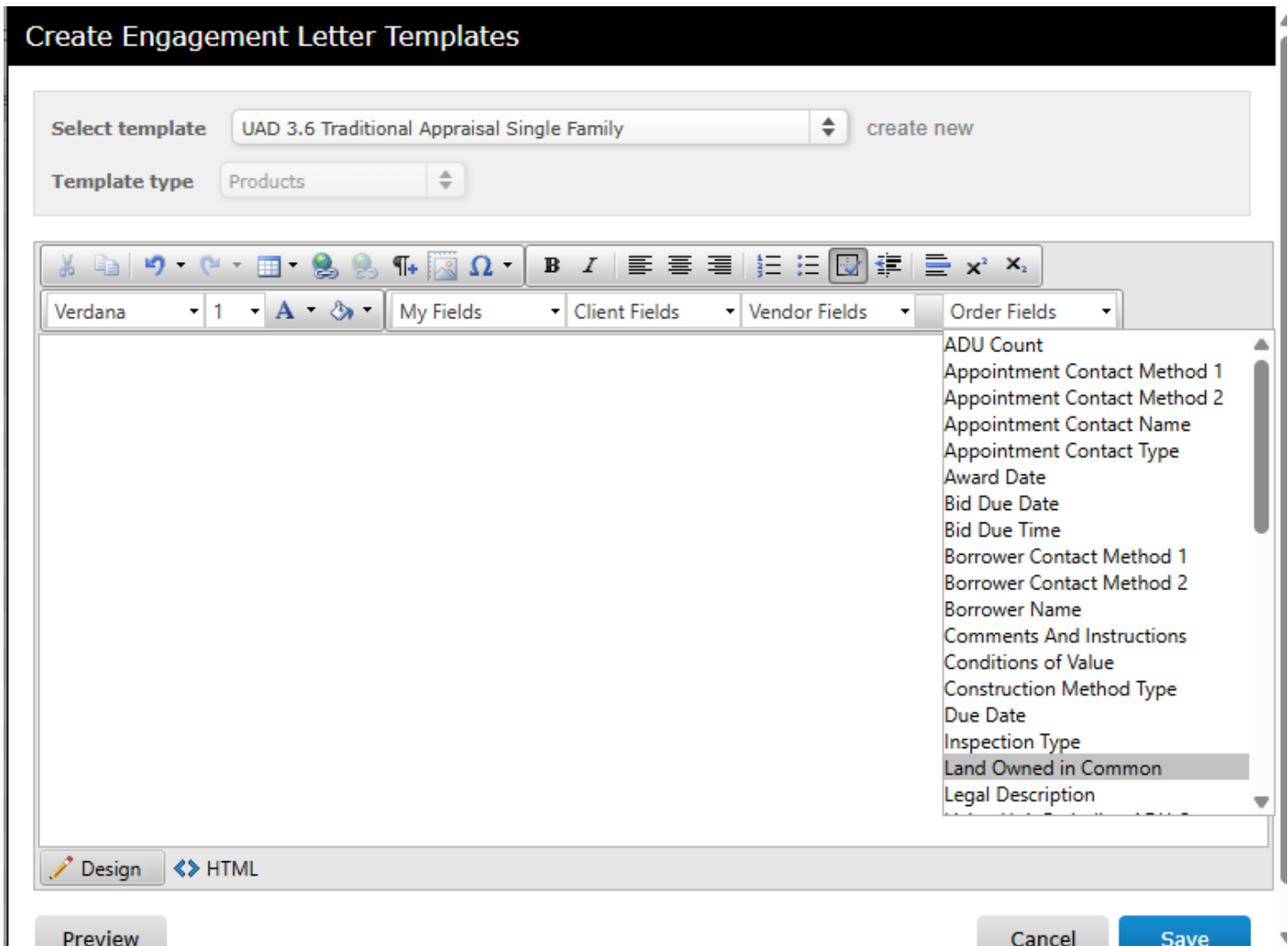
For customers creating custom Engagement Letter Templates, those templates must now be classified as either **Legacy Forms** or **Products (UAD 3.6)**. All existing Engagement Letter Templates

have been classified as **Legacy Forms**. When a user creates a new Engagement Letter Template, they must select the template type.

The screenshot displays the 'Create Engagement Letter Templates' window. At the top, there's a 'Select template' dropdown set to 'Commercial statement of engagement (Default)' with a 'create new' link. Below it, the 'Template type' is set to 'Legacy Forms'. The main area features a rich text editor with a toolbar (bold, italic, bulleted list, numbered list, link, unlink, etc.) and a font dropdown set to 'Verdana'. Below the toolbar are tabs for 'My Fields', 'Client Fields', 'Vendor Fields', and 'Order Fields'. The editor content includes placeholder fields like '\$Logo#', '\$CLIENTADDRESS1#', '\$CLIENTCITY#', '\$CLIENTSTATE#', '\$CLIENTZIP#', '\$VENDORCOMPANYNAME', '\$VENDORADDRESS1#', '\$VENDORCITY#', '\$VENDORSTATE#', and '\$VENDORZIP#'. A modal dialog titled 'Enter template name' is open, with a 'Template name' text input and a 'Template type' dropdown set to 'Products'. The dialog has 'Cancel' and 'OK' buttons. At the bottom of the main window are 'Preview', 'Cancel', and 'Save' buttons.

The selected template determines which fields are available to populate in the Engagement Letter Template. Additional fields available to use in UAD 3.6 **Products** templates include:

- Prop Attachment
- Property Type
- Living Unit Excluding ADU
- Property Valuation Method
- Project Legal Structure
- ADU Count
- Construction Method
- Rent Schedule Indicator
- PUD Indicator
- Land Owned in Common Indicator
- Property Usage
- Order Type
- Mortgage Type
- Valuation Assignment Type



Applying an Engagement Letter Template to a specific product is configured in the Product Requirements module.

User Profiles Configuration Ready in UAT

VMP Client

Client Notifications

Additional notifications will be added for new statuses introduced to Mercury Network. More details will be coming soon.

Client Users

Permissions that have been added or changed:

Manage UAD 3.6 Fees: This permission allows users to configure fees in the Preferences → Fees module.

Submit to Review: Today, this permission allows users to submit orders to RealView manually. For UAD 3.6 orders, this permission allows users to manually send the valuation product to the Investigate Review solution. The option to submit to Investigate will be available only for orders in a Completed status that have not already been sent to Investigate.

Submit to UCDP: Today, this permission allows users to manually submit an order to UCDP. This also now applies to manually submitting UAD 3.6 orders to UCDP. However, note that all users, regardless of this permission setting, can view our new Investor Submission section in the order workspace.

Contact Information			
Primary E-mail * (Note: This is also your username you use to sign in)			
Minnie.LendxQA@mercnet4.com			
Password			

First Name *		Last Name *	
Minnie		LenderQA	
Title			
Additional E-mail Addresses			
Phone	Ext	Fax	Mobile
(405) 555-5555			
Company Information			
Company Name			
Natalia Lending			
Address *			
501-D NE 122ND St			
Address (continued)			
City *			
Oklahoma City			
State *		Zip *	
Oklahoma		73114	
Average Number of Orders Per Month			
Choose...			
Website			
Notification Settings			
Order Notifications (My Orders)			
☒ E-mail			
Order Notifications (Managed Orders)			
☒ E-mail			
Daily Status Report			
The Daily Status Report is a summary of all your open orders in one report that is sent to you by e-mail.			
☐ E-mail			
Permissions			
Order Management			
☒ Place New Orders	☒ Edit/Update Orders	☒ Manage Orders by Product	☐ Manage Orders by Folder
☒ Selection Settings (Per Order)	☒ Required to Use Fee Panel	☐ View/Manage Other Users' Orders	☐ Submit to UCDP
☐ Compliance	☐ Manage QuickLists	☐ Cover Vendor's Transaction Fee	☒ Submit to FHA
☒ Auto Assignment Approval	☐ Submit to Review	☐ Rate Vendors	☒ Access Business Management
☐ Mark Orders as Paid			
Preferences Management			
☒ Order Product Requirements	☒ VMP Client Order Setup	☒ Vendor Selection Settings	☐ Manage UAD 3.6 Fees
☐ Review Settings			

Client Groups

- VMP Client Notifications
 - Additional notifications will be added for new statuses introduced to Mercury Network. More details will be coming soon.
- Details Tab
 - UAD 3.6 orders are not managed within the Client Group profile; they are handled in the new fees module.
- Automated Tab
 - Customers can now configure Sure Receipts for UAD 3.6 products and legacy forms.
 - A new permission has been added to control whether the “Use Pending Release” feature is enabled. Customers can use the Pending Release feature to control whether a UAD 3.6 order

transitions to the Pending Release status. The “Use Quality Control (QC) folders” setting does not apply to UAD 3.6 orders; however, customers can configure at the Client Group level whether an order transitions to the **Pending Release** status rather than automatically moving forward to the **Completed** status. This enables customers to perform any manual checks they need before moving the order to the **Completed** status.

- The existing UCDP settings do not apply to UAD 3.6 orders. To simplify and streamline UCDP submission settings, we now host a single set of customized UCDP submission plans in Preferences → Connection Settings. In each Client Group profile, customers will select which UAD 3.6 UCDP Submission Plan applies to that Client Group.

Vendor Assignment

Today, vendor assignment relies heavily on appraisal form numbers. Vendor profiles (which house eligibility criteria for order assignment) and the auto-assignment logic are updated to use UAD 3.6 data points to determine who is eligible for specific orders/scopes of work.

Vendor Profile Updates/Assignment Eligibility

Ready in UAT

Configuration

Vendor profiles have been revised to include new eligibility criteria. These criteria must be activated for a vendor to qualify for any order that features these specific values or characteristics.

- UAD 3.6 products (referred to as **Residential Appraisals**) added to Coverage Area.
 - Legacy appraisal forms are now under a tab called **Residential Appraisal - Legacy Forms**
- New Assignment Criteria:
 - Valuation Assignment Type
 - Mortgage Type
 - Construction Method Type (multi-select enumerations)
 - PUD (single checkbox)
 - Land Owned in Common (single checkbox)

- Living Unit Excluding ADU Count
- ADU (single checkbox indicating an ADU is present)
- Rent Schedule (single checkbox indicating a rent schedule is required)
- Rush
- Property Usage

Note: The MISMO 3.6 “Conventional” Mortgage Type has been added to all vendor profiles as read-only. All new vendors will automatically be eligible for UAD 3.6 orders with a “Conventional” Mortgage Type.

Service Providers must update their profiles to include coverage for these order characteristics as applicable. Customers must assess these criteria and determine vendor eligibility as needed.

Profile

Details

Professional

Products

Eligibility

Coverage

My Panels

Product Order Details Eligibility

Please check all applicable boxes to specify your coverage of the below property characteristics. By checking the box you are indicating that you accept work for properties with that particular characteristic.

Assignment Information

Valuation Assignment Type

☒ Construction

☒ DeedInLieu

☒ HomeEquity

☒ LoanModification

☒ PortfolioEvaluation

☒ Preforeclosure

☒ Purchase

☒ Refinance

☒ REO

☐ ShortSale

☒ Other

Mortgage Type

☐ Conventional

☒ FHA

☒ Private

☒ USDA Rural Development

☒ VA

☒ Other

☒ Rent Schedule

☒ Rush

Property Information

Property Usage

☒ Investment

☒ Primary Residence

☒ Second Home

☒ Other

Construction Method Type

☒ Container

☒ Manufactured

Profile

Details

Professional

Products

Eligibility

Coverage

My Panels

Default Products and Fees

1

Use the checkboxes to select payment methods you accept.

☒ ACH
☒ C.O.D.
☒ Check
☒ CC to Vendor
☒ Deferred CC
☒ Invoice
☒ Money order
☒ Net 30
☒ PayPal

2

Indicate which products you offer by entering a fee next to each product. Include an explanation of additional fees, along with your refund policies, in your fee notes.

Residential Appraisal

Residential Appraisal - Legacy Forms

Commercial Appraisal

Broker Price Opinion

Inspection

Product	Fee	Fee Notes
Completion Report	60	Note
Restricted Appraisal Update	50	Note
Desktop Appraisal - Condominium	20	Note
Desktop Appraisal - Cooperative	5	Note
Desktop Appraisal - Manufactured Home	6	Note
Desktop Appraisal - Other	5	Note
Desktop Appraisal - Single Family	77	Note
Desktop Appraisal - Two To Four Family	10	Note
Exterior Appraisal - Condominium	11	Note
Exterior Appraisal - Cooperative	11	Note
Exterior Appraisal - Manufactured Home	1	Note
Exterior Appraisal - Other	5	Note
Exterior Appraisal - Single Family	5	Note
Exterior Appraisal - Two To Four Family	5	Note
Hybrid Appraisal - Condominium	5	Note
Hybrid Appraisal - Cooperative	5	Note
Hybrid Appraisal - Manufactured Home	5	Note
Hybrid Appraisal - Other	5	Note
Hybrid Appraisal - Single Family	5	Note
Hybrid Appraisal - Two To Four Family	5	Note

Fee Panel

DC

Orders

Fee Panel

Clients

Users

Preferences

Reports

Account

Payments

Collateral Investigator

+

 Add

✕

 Remove

⊖

 Mark ineligible

✉

 Contact vendor

👤

 Order groups

🔧

 Build fee panel

⚙️

 Options

🔍

 Find

Vendor types: All

Fee panel

Natalia VendorQA

Appraiser/Agent fee panel

AMC/Firm fee panel

Candidate list

Ineligible vendors

Review documents*

States

All members (11)

Guam (1)

Oklahoma (10)

All members

Company name

Natalia Appraisals

Natalii Lending

Natalia Appraisals

AMP VMN Space

Anna Appraisals

Anastasia Appraisal Company

Nata Vendor

Natalia Appraisals

Natalia Appraisals

Natalia Appraisals

Anna Appraisals

Profile - Natalia VendorQA

General

Assignment

Products

Coverage

Eligibility

Statistics

Ratings

Notes

Approve the vendor's assignment eligibility for each product.

Residential Appraisal

Residential Appraisal - Legacy Forms

Approved	Product	Vendor Fee
☒	Completion Report	60
☒	Restricted Appraisal Update	50
☒	Desktop Appraisal - Condominium	20
☒	Desktop Appraisal - Cooperative	5
☒	Desktop Appraisal - Manufactured Home	6
☒	Desktop Appraisal - Other	5
☒	Desktop Appraisal - Single Family	77
☒	Desktop Appraisal - Two To Four Family	10
☒	Exterior Appraisal - Condominium	11

Remove from fee panel

Cancel

Save

Automated Vendor Assignment Logic

Automated vendor assignment logic has been updated to account for all new eligibility criteria and correctly evaluate eligibility for legacy forms versus UAD 3.6 orders.

For customers using advanced automated assignment, we will work with you to update your existing logic.

Fulfillment Workflow

Property Details Collaboration

Ready in UAT

We are excited to introduce a new feature that allows service providers to submit modifications to property characteristics identified during their evaluation process. The appraiser or AMC can now send updates to the lender prior to the appraisal's completion. This enables the Secure user to either approve or decline the change and assess any potential impacts on the transaction and re-disclosure requirements.

This process facilitates quick communication between the service provider and their client. The Secure order is placed into a **Product Order Details Requested** status so that Mercury Secure users immediately know it needs their attention. Users with the appropriate permissions can approve or decline a request to revise order details via the Mercury user interface or the LOS integration, provided the LOS supports this functionality.

Service Provider View:

Order Details

Orders

Account

Users

Back

Edit Order

Send Message

Set Order Status

Attach Documents

Complete

Print

Get Help

Residential appraisal order details

Tracking

History (In Progress)

12/09/25 02:36 AM

Past Due Reminder Sent

12/07/25 02:35 AM

Past Due Reminder Sent

12/05/25 02:06 AM

Past Due Reminder Sent

12/03/25 02:06 AM

Past Due Reminder Sent

12/01/25 01:36 AM

Past Due Reminder Sent

11/29/25 01:35 AM

Past Due Reminder Sent

11/27/25 01:06 AM

Past Due Reminder Sent

11/25/25 01:05 AM

Past Due Reminder Sent

11/23/25 01:05 AM

Past Due Reminder Sent

11/21/25 12:35 AM

Past Due Reminder Sent

11/19/25 12:35 AM

Past Due Reminder Sent

11/17/25 12:05 AM

Past Due Reminder Sent

11/06/25 09:32 AM

Order accepted by Appraiser (Natalia VendorQA) and In Progress

11/06/25 09:31 AM

Awaiting acceptance by Natalia VendorQA

Inspection Scheduled

Inspection Complete

Request Modification

Product Details Request

Delayed

Resume

Revision Cancelled

Cancel

Order Details

Orders

Account

Users

Back

Edit Order

Send Message

Set Order Status

Attach Documents

Complete

Print

Get Help

Residential appraisal order details

Tracking #MERC-863254-863

History (In Progress)

12/09/25 02:36 AM

Past Due Reminder Sent

12/07/25 02:35 AM

Past Due Reminder Sent

12/05/25 02:06 AM

Past Due Reminder Sent

12/03/25 02:06 AM

Past Due Reminder Sent

12/01/25 01:36 AM

Past Due Reminder Sent

11/29/25 01:35 AM

Past Due Reminder Sent

11/27/25 01:06 AM

Past Due Reminder Sent

11/25/25 01:05 AM

Past Due Reminder Sent

11/23/25 01:05 AM

Past Due Reminder Sent

11/21/25 12:35 AM

Past Due Reminder Sent

11/19/25 12:35 AM

Past Due Reminder Sent

11/17/25 12:05 AM

Past Due Reminder Sent

11/06/25 09:32 AM

Order accepted by Appraiser (Natalia VendorQA) and In Progress

11/06/25 09:31 AM

Awaiting acceptance by Natalia VendorQA

Notes: Opportunity expires at 11/07/2025 09:31 AM Central time.

Client Information

Name

CampbellTest LenderQA

Phone

800-252-6633

Company

CampbellTestLenderQA

Fax

Address

1234 Gorman St

E-mail

CampbellTestLenderQA@

Oklahoma City, OK 73134

Vendor Information

Name

Natalia VendorQA

Phone

405-555-5556

Company

Natalia Appraisals

Fax

Address

501-D NE 122ND St

E-mail

Natalia.VendorQA@merc

Oklahoma City, OK 73114

Assignment Information

Product

Traditional Appraisal - Single Family

Order Type

Appraisal URAR

Loan #

Auto99

Order Fee

\$

Mortgage Type

Trans Fee

\$18.50

Valuation

Purchase

Due Date

11/16/2025 (Rush)

Assignment Type

Other Ref #

987654

File #

654321

Internal Order #

Property Valuation

TraditionalAppraisal

Product Details Request

Request a change to one or all of these product details. The client will have the opportunity to review the request and accept/decline the modification request.

Current Value

Proposed Value

Property Type

Single Family

Single Family

Project Legal Structure

Condominium

Condominium

Construction Method

Site Built

Site Built

Land Owned in Common

Yes

Yes

PUD

Yes

Yes

Living Unit Excluding ADU

2

2

ADU Count

8

8

Notes

Cancel

OK

Lender View:

Order Details

DataCourier

Orders

Fee Panel

Clients

Users

Preferences

Reports

Account

Payments

Collateral Investigator

←

✎

✉

Message

📶

Get status

📎

Attach

📄

Add note

📄

Duplicate

🖨

Print

📧

Send to Review

?

There are multiple orders for this property. [View info](#)

Residential appraisal order details

Tracking #MERC-862478

Documents, Maps, & Stats

Product Details Request

	Original Value	Requested Change Value	I agree to requested modification	Update VMP Client
Property Type	Condominium	Manufactured Home	☐	☐
Project Legal Structure		Condom	☐	☐
Construction Method		Other	☐	☐
Land Owned in Common	No	Yes	☐	☐
PUD	No	Yes	☐	☐
Living Unit Excluding ADU	1	3	☐	☐
ADU Count		6	☐	☐

Comments to vendor

OK

History (Product Order Detail Requested)

10/29/25 10:21 PM CT Product Order Detail Requested by AMC (Natali AMC)
Notes: Neighborhood Housing Type: Manufactured Home; Project Legal Structure: Condom; Construction Method: Other; Land Owned In Common: Yes; PUD Indicator: Yes; Living Units (Excl ADU): 3; Accessory Dwelling Units

Assignment ratings

Use the stars below to rate the quality of the report and the professionalism you experienced with the vendor during this assignment.

Quality

☆☆☆☆☆
Rated: 0 stars

Professionalism

☆☆☆☆☆
Rated: 0 stars

Comments

Clear

Save

Order Documents

Document Type

Date Uploaded

Order Documents

Statement of Engagement

10/29/2025

Details and Tools

📁

📄

🔒

🔍

🗑

Get Zillow® report for this address

Appraisal Delivery

Ready in UAT

The only acceptable file format for a UAD 3.6 appraisal is a .zip file. PDFs and MISMO XML are not acceptable. Service providers cannot upload a .zip file to legacy form orders, and they cannot upload anything other than a .zip file for the appraisal on a UAD 3.6 order.

Note: When a vendor uploads an appraisal report, the order is temporarily locked to prevent a second file from being uploaded. The "Attach Documents" and "Complete" buttons will remain disabled until the zip file has been fully uploaded to Mercury.

Critical Rule Firings

Ready in UAT

Configuration

Mercury Network has implemented new automated rules that run the moment an appraisal is uploaded. This allows customers to catch completeness and compliance issues immediately—before the file even hits a reviewer’s desk. We run several different types of rules:

- Basic virus scan and file validation to ensure the file is well-formatted.
 - If a rule fails, a Document Failed status is returned. The secure user will receive a system alert indicating that a product upload was attempted, failed, and that the vendor has been asked to reupload the file.
- UAD Rules to confirm that the zip file meets basic UAD guidelines for successful upload to UCDP
 - If a rule fails, the order will move to a **Revision - Correction Needed** status, and the vendor will receive a revision request to correct the issue.
- Review rules that check for compliance and risk factors (Investigate Customers Only)
 - Investigate customers can configure which review rules they want to categorize as **Severe**. If a **Severe** review rule fires upon appraisal upload, the order will move to a **Revision - Correction Needed** status, and the vendor will receive a revision request to correct the issue.

Review Rule Firings Override

Ready in UAT

- When an appraisal triggers a critical review rule but must proceed anyway, users with the necessary permissions can override the critical rule firing exception. This action allows the order to bypass the required correction step, moving it immediately from the **Revision - Correction Needed** status to

Automated Revision Requests Ready in UAT

Several processes within the UAD 3.6 workflow may automatically initiate a revision request to the service provider, outlining the specific issue(s) that need to be addressed.

In addition to the critical rules scenarios outlined above, automated revision requests will be generated when a fatal UCDP submission finding is detected. UCDP Fatal findings that require an appraisal modification will automatically trigger a revision request to the service provider, detailing the issue(s) to be resolved. Clients can view the requested revisions and their contents in the Investor Submission workspace. The Investor Submission workflow is detailed in the Investor Submission section later in this document.

Investor Submission

Investor Doc File ID:
28008HE581

Business Unit:
M2P48521

Fannie Seller Servicer Number:
275410004

Freddie Seller Servicer Number:
0442736

Feedback

Help

Summary

Product	Sequence	Document ID	Fannie Mae	Freddie Mac
Traditional Appraisal - Single Family	1	20250409-0091-1	Successful	Revision Requested

Initial Submission: 04/09/2025 07:55:51 AM

Last Submission: 04/09/2025 07:55:51 AM

Fannie Mae

Successful

CU Risk Score: 999

View SSR

Freddie Mac

Revision Requested

LCA Quality Risk Score:

LCA Valuation Risk Score:

Fatal Warning

FRE43590

The appraisal report effective date is either missing, improperly formatted, a future date, or exceeds the one-year limit.

Fatal Warning

FRE76020

UCDP Document Status is not successful. Please review the Freddie Mac Proprietary Findings for additional information.

View SSR

View Appraisal Report

Download Appraisal Zip

Note: In the future, clients will be able to configure Mercury to consolidate vendor feedback across the various rule checks to reduce the number of automated revision requests.

Revision Request Formatting Ready in UAT

Revision requests are now better formatted and easier to read. You can view revision requests in three places:

- The order's history log
- The Investor Submission section of the workspace (Secure only, and only if the revision is the result of a fatal finding at appraisal upload or investor submission)
- A PDF will be added to the order's document repository detailing the revision request.

Revision Request Details

Order Details

Loan Number:	123LoanNumber	Product:	Appraisal URAR
Tracking ID:	TrackingId123	Revision Request Date:	10/14/2025

Revisions Requested

Rule ID:	123RuleId
Rule Description:	Lorem ipsum
Comment:	Lorem ipsum dolor sit amet consectetur adipiscing elit. Quisque faucibus ex sapien vitae pellentesque sem placerat. In id cursus mi pretium tellus dui convallis. Tempus leo eu aenean sed diam urna tempor. Pulvinar vivamus fringilla lacus nec metus bibendum egestas. laculis massa nisl malesuada lacinia integer nunc posuere. Ut hendrerit semper vel class aptent taciti sociosqu. Ad litora torquent per conubia nostra inceptos himenaeos.
Rule ID:	456RuleId
Rule Description:	Lorem ipsum
Comment:	Lorem ipsum dolor sit amet consectetur adipiscing elit. Quisque faucibus ex sapien vitae pellentesque sem placerat. In id cursus mi pretium tellus dui convallis. Tempus leo eu aenean sed diam urna tempor. Pulvinar vivamus fringilla lacus nec metus bibendum egestas. laculis massa nisl malesuada lacinia integer nunc posuere. Ut hendrerit semper vel class aptent taciti sociosqu. Ad litora torquent per conubia nostra inceptos himenaeos.

Investor Submission

Mercury will use a modernized module to manage UCDP submissions for UAD 3.6 orders. Legacy form orders will continue to use the current process flow. Users will have access to training videos and articles to learn how to use all aspects of the new Investor Submission module.

Investor Submission Workspace

Ready in UAT

The Investor Submission Workspace is a new section within the order workspace for managing UAD 3.6 UCDP submissions. In this workspace, clients can:

- Manage all products associated with the same GSEDocFileID in one convenient location.
- Easily check the status of each submission or automated revision requests sent to the vendor due to fatal findings.
- Create manual revision requests.
- Access the SSR.
- Review a history log specifically for investor submissions.
- Download the zip file, and much more.

Investor Submission

Feedback Help

Investor Doc File ID:	Business Unit:	Fannie Seller Servicer Number:	Freddie Seller Servicer Number:
28008HE609	MZP48521	275410004	0442736

Summary

	Product	Sequence	Document ID	Fannie Mae	Freddie Mac
▼	Traditional Appraisal - Single Family	1	20250409-0090-1	Successful	Not Successful

Investor Submission

Feedback Help

Investor Doc File ID:
28008HE609

Business Unit:
M2P48521

Fannie Seller Servicer Number:
275410004

Freddie Seller Servicer Number:
0442736

Summary

	Product	Sequence	Document ID	Fannie Mae	Freddie Mac
^	Traditional Appraisal - Single Family	1	20250409-0090-1	Successful	Not Successful

Initial Submission: 04/09/2025 02:47:31 PM
Last Submission: 04/09/2025 02:47:31 PM

Fannie Mae

Successful

CU Risk Score: 999

View SSR

Freddie Mac

Not Successful

LCA Quality Risk Score: LCA Valuation Risk Score:

Fatal Warning

FRE43590

The appraisal report effective date is either missing, improperly formatted, a future date, or exceeds the one-year limit.

Fatal Warning

FRE76020

UCDP Document Status is not successful. Please review the Freddie Mac Proprietary Findings for additional information.

View SSR

View Appraisal ReportDownload Appraisal Zip

Request Revision

Investor Submission

Feedback Help

Investor Doc File ID:
28008HE581

Business Unit:
M2P48521

Fannie Seller Servicer Number:
275410004

Freddie Seller Servicer Number:
0442736

Summary

	Product	Sequence	Document ID	Fannie Mae	Freddie Mac
^	Traditional Appraisal - Single Family	1	20250409-0091-1	Successful	Revision Requested

Initial Submission: 04/09/2025 07:55:51 AM
Last Submission: 04/09/2025 07:55:51 AM

Fannie Mae

Successful

CU Risk Score: 999

View SSR

Freddie Mac

Revision Requested

LCA Quality Risk Score: LCA Valuation Risk Score:

Fatal Warning

FRE43599

The appraisal report effective date is either missing, improperly formatted, a future date, or exceeds the one-year limit.

Fatal Warning

FRE76020

UCDP Document Status is not successful. Please review the Freddie Mac Proprietary Findings for additional information.

View SSR

View Appraisal ReportDownload Appraisal Zip

History Log

Revision Request

History Log

Revision Request

Brittany Severhill 04/09/2025 at 02:49 PM

Freddie Mac Submission Not Successful

SYSTEM 04/09/2025 at 07:59 AM

Fannie Mae GSE Submission Successful

SYSTEM 04/09/2025 at 07:59 AM

Investor DocFileID Received

SYSTEM 04/09/2025 at 07:56 AM

Show Less

Investor Submission

Feedback Help

Investor Doc File ID:
28008HE584

Business Unit:
M2P48521

Fannie Seller Servicer Number:
275410004

Freddie Seller Servicer Number:
0442736

Summary

	Product	Sequence	Document ID	Fannie Mae	Freddie Mac
^	Traditional Appraisal - Single Family	1	20250409-0091-1	Successful	Successful
^	Restricted Appraisal Update	1	20250409-0091-2	Successful	Successful
^	Completion Report	1	20250409-0091-3	Successful	Successful
^	Traditional Appraisal - Single Family	2	20250409-0091-4	Successful	Successful

Investor Submission

[Feedback](#) [Help](#)

Investor Doc File ID: 28008HE581 Business Unit: MZP48521 Fannie Seller Servicer Number: 275410004 Freddie Seller Servicer Number: 0442736

Summary

Product	Sequence	Document ID	Fannie Mae	Freddie Mac
Traditional Appraisal - Single Family	1	20250409-0097-1	Successful	Successful
Initial Submission: 04/09/2025 09:45:51 AM Last Submission: 04/09/2025 09:45:51 AM				
Fannie Mae CU Risk Score: 999 View SSR		Freddie Mac LCA Quality Risk Score: LCA Valuation Risk Score: 99 View SSR		
View Appraisal Report Download Appraisal Zip				
History Log Freddie Mac GSE Submission Successful SYSTEM 04/09/2025 at 09:49 AM Show More				
Restricted Appraisal Update	1	20250409-0097-2	Successful	Successful

Automated Revision Requests Ready in UAT

UCDP Fatal findings that require an appraisal modification will automatically trigger a revision request to the service provider, detailing the issue(s) to be resolved. Clients can view the requested revisions and their contents in each GSE section and in the history log.

Investor Submission

[Feedback](#) [Help](#)

Investor Doc File ID: 28008HE581 Business Unit: MZP48521 Fannie Seller Servicer Number: 275410004 Freddie Seller Servicer Number: 0442736

Summary

	Product	Sequence	Document ID	Fannie Mae	Freddie Mac
^	Traditional Appraisal - Single Family	1	20250409-0091-1	Successful	Revision Requested
Initial Submission: 04/09/2025 07:55:51 AM					
Last Submission: 04/09/2025 07:55:51 AM					
Fannie Mae Successful CU Risk Score: 999 View SSR		Freddie Mac Revision Requested LCA Quality Risk Score: LCA Valuation Risk Score: Fatal Warning FRE43590 The appraisal report effective date is either missing, improperly formatted, a future date, or exceeds the one-year limit. Fatal Warning FRE76020 UCDP Document Status is not successful. Please review the Freddie Mac Proprietary Findings for additional information. View SSR			
View Appraisal Report Download Appraisal Zip					
History Log Revision Request Brittany Severhill 04/09/2025 at 02:49 PM Freddie Mac Submission Not Successful SYSTEM 04/09/2025 at 07:59 AM Fannie Mae GSE Submission Successful SYSTEM 04/09/2025 at 07:59 AM Investor DocFileID Received SYSTEM 04/09/2025 at 07:56 AM Show Less					

Investor Submission Configuration Configuration Ready in UAT

Each customer will decide whether the UCDP submission for UAD 3.6 orders will be triggered manually or automatically. This is a global setting that applies to all UAD 3.6 orders.

Administrative configurations must be set up to define UCDP Submission Plans. Clients can use a single default plan or create multiple plans and specify which UCDP Submission Plan to apply to each Client Group. Each plan specifies:

- Business unit and Seller Servicer #s

- The GSE entity(ies) to submit to
- Which products are eligible and not eligible for UCDP submission.

If a customer chooses manual submission, the configuration defining which products are eligible and not eligible for submission do not apply. Any user with the proper permissions can manually submit a UAD 3.6 product to UCDP.

UCDP Submission Settings

Submission Type

Manual Submission: By default, UCDP submission type is set to Manual, requiring a user to manually submit each eligible order to UCDP.

Automatic Submission: Orders eligible for UCDP submission based on your system settings will be automatically submitted to the UCDP portal. Submission to Fannie Mae and/or Freddie Mac is controlled by the business unit associated to the order.

Automatic

Business Unit Submission Plans

Accounts with multiple business units will need to select one default business unit submission plan. If a business unit and at least one Seller/Service # are not specified at order creation, the system will apply the business unit submission plan associated to the order's client group.

The submission settings plan for each client group is selected within the Client Group profile. If no plan is selected within the Client Group profile, the plan marked as "default" below will be applied.

Is Default	Plan Name	Business Unit	Fannie Mae	Freddie Mac	Product Settings
☒	Test Plan	NPE45174	☒	☐	UpdateCancel
☐		select...	☐	☐	

Customers can configure within the Client Group Profile which Investor Submission plan should be used for orders associated with that client group. This is necessary only if the client group requires a different submission plan from the global plan(s).

secure.mercurypoint.com/Admin/ClientManagement/Contacts.aspx

Mercury Network

Contacts

Automated Client Group

SureReceipts Delivery

For this client group, **always** automatically send the selected appraisal products to the borrower **immediately** after the order is marked complete.

SureReceipts is an easy-to-use tool for delivering the completed appraisal report to your borrower(s) in a safe, secure, and compliant manner.

☒ Include co-borrower when present

☐ Cancel scheduled delivery when revision or reconsideration of value is requested

☐ Use this group's company name for SureReceipts delivery

[Customize automated delivery](#)

[Attach ROV Disclosure](#)

Client Group Requirements

Instructions

Enter custom instructions here...

☐ Use these instructions instead of Product Requirements

☒ Use Quality Control (QC) folders

☐ Use Pending Release

☒ Additional recipients receive ALL notifications

☐ Additional recipient notifications match client

Documents

☐ Automatically attach a custom document to new orders placed in this group. [Upload](#)

Legacy Form UCDP Settings

☐ Automatically submit to UCDP **the first time** an order's status changes to **Completed**

Business Unit **(None Selected)**

Submit to **(None Selected)**

☐ Automatically share UCDP submission results

Aggregator ID **107624**

[Customize automated submission](#)

UCDP Settings

Submission Plan **Test Plan**

FHA Electronic Appraisal Delivery Portal

☐ Automatically submit to FHA **the first time** an order's status changes to **Completed**

Business Unit **(None Selected)**

[Customize automated submission](#)

Invoicing Options

Configure automatic creation or attachment of invoices to orders placed in this group.

☒ Create invoice when new order is placed

☒ Attach invoice when credit card is charged

☒ Attach invoice when order is marked complete

☐ Include the vendor's fee on the invoice

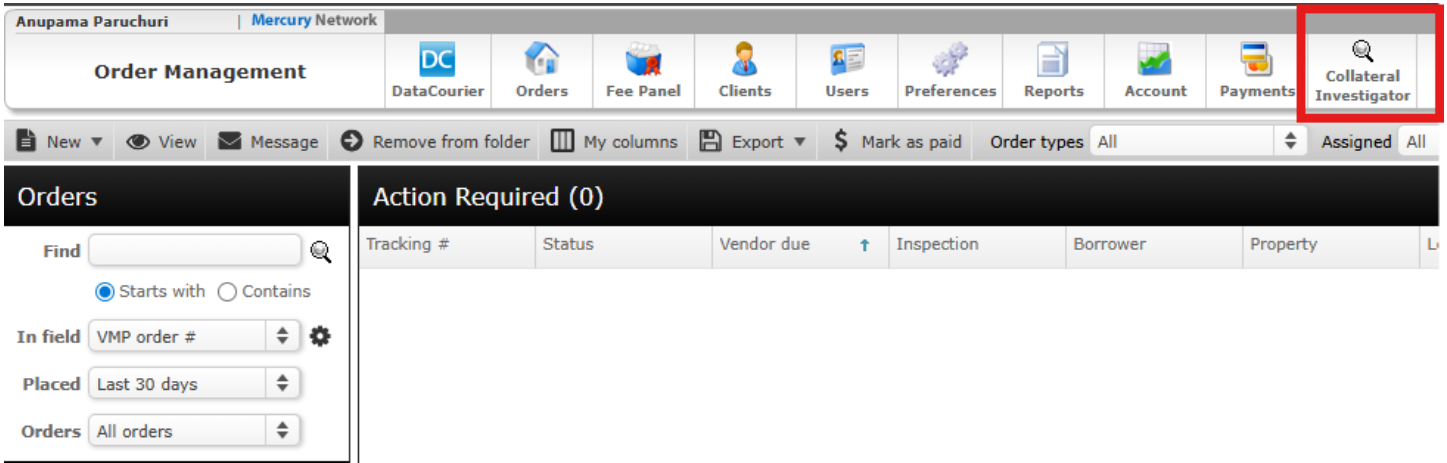
[Customize your invoice number and due date options](#)

Advanced Investor Submission Features

In 2026, the new workspace will also allow clients to perform advanced actions on files within the UCDP portal, such as deleting and repositioning.

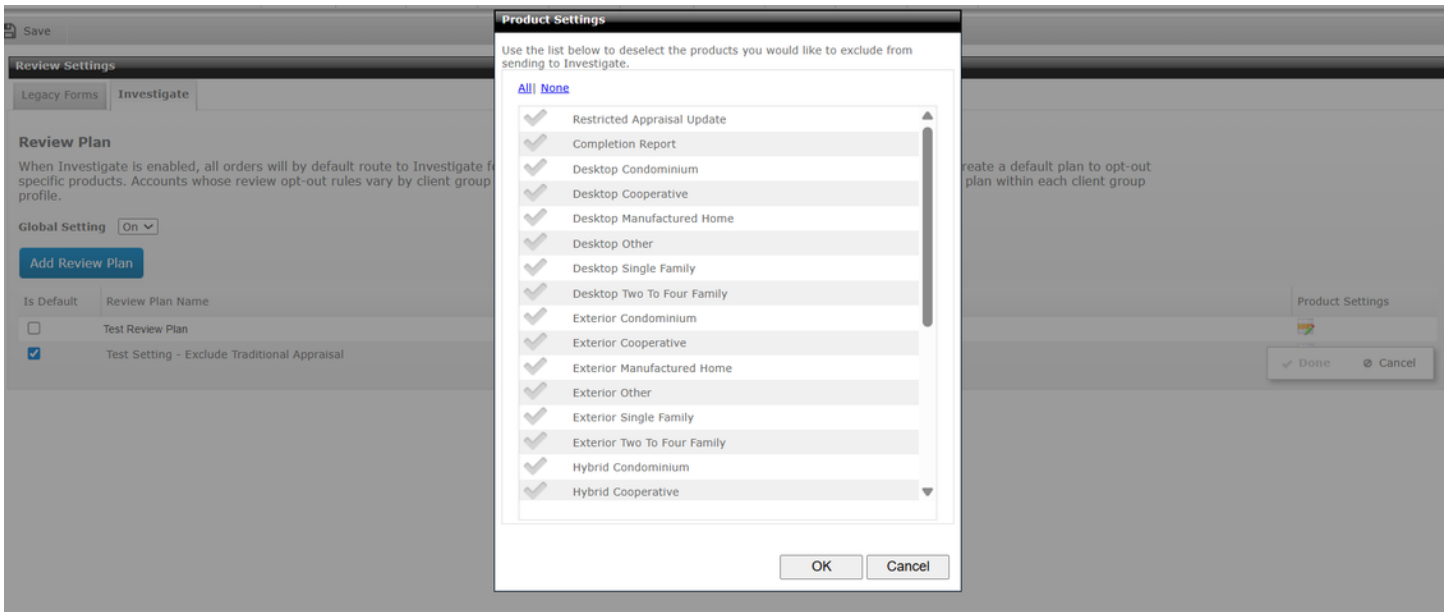
Review

We are excited to introduce a brand new review tool called **Investigate**. This new tool replaces **RealView** for UAD 3.6 orders and will revolutionize your review process. Information and user guides for the Investigate solution will be covered in a separate document.



For customers under contract for our review solution, all orders will flow to review by default after they have passed the automated rules and investor submission is successful (if applicable).

Customers can configure review submission plans to bypass review for specific products, and assign different review plans to each client group if necessary.



Pending Release Status

Configuration

Ready in UAT

UAD 3.6 orders will not flow through the QC folders; however, customers can still “pause” orders for manual review before releasing them to a **Completed** status. A new administrative configuration allows customers to choose whether orders are set to **Completed** status or stop in a **Pending Release** status first. Customers who choose to stop the order in the **Pending Release** status must manually move it to **Completed** once their manual processes are complete.

Note: All UAD 3.6 secure orders will now move to a Delivered status once the service provider uploads the appraisal. If your system is configured to sync the **Pending Quality Review** status to your

client order, the client order will move to **Pending Quality Review** when the secure order is in a **Delivered** status.

Order Management and Reporting

Order Details Workspace

Ready in UAT

The following fields are now visible on UAD 3.6 orders.

- Prop Attachment
- Property Type
- Living Unit Excluding ADU
- Property Valuation Method
- Project Legal Structure
- ADU Count
- Construction Method
- Rent Schedule Indicator
- PUD Indicator
- Land Owned in Common Indicator
- Property Usage
- Order Type
- Mortgage Type
- Valuation Assignment Type
- Parent Tracking Number (this will only be populated on Completion Reports and Restricted Update Reports) *VMP Client view only. On Secure orders, this information is available in the new Investor Submission section.*

GSE Doc File ID has been renamed to Investor Doc File ID.

There are also several fields present on legacy forms orders but not on UAD 3.6 **orders**. Several of these fields are replaced with fields that house similar information.

- Form/type
- Loan Type
- Loan Purpose
- Prop Type
- Occupancy

The document repository has been updated for better usability.

- Customers can now download files directly without first opening them.
- For appraisal files, users can view or download the PDF, download the XML, or download the entire Zip file.

Order Documents

Document Type	Date Uploaded
▼  Completed Report (Current)	
 Appraisal Report	09/29/2025
 Report PDF	09/29/2025
 MISMO XML	09/29/2025

Details and Tools



Document Name	Appendix D-1 SF1_Appraisal_8....
Uploaded On	09/29/2025 06:01:50 AM
Uploaded By	Nataliia Vendor QA

VMP Client View

BackSend MessageAttach DocumentsOther ActionsPrint

Appraisal Order Details

Tracking #: HIRC-832735

History (4)

2425 NW 20th st
Oklahoma City, OK 73107
Borrower: Automationtest Borrower

Appraised Value:
Order Date: 6/29/2012
Intent to Proceed Received Date: [6/6](#)
Order Type: Completion Report
Property Valuation Method: Traditional Appraisal
Due Date: 1/13/2026 (Rush)
Closing Date: [6/6](#)
Fee: \$159.00
Payment Type: [Invoice](#)
Estimated Value: \$100,000
Loan Number: Automation123456
Parent Tracking Number: 654321
File Number: [123-567890](#)
DUI Case File ID: [6/6](#)
LPA Key: [6/6](#)
PDAPI Key:
BACE Submission ID:
Property Data ID:
Other Ref #: 987654
Vendor Name: *Appraiser
Assigned AE: WESTERN TPO OC (562) 681-9529 Fax: (714) 882-7395 CampbellTestLenderQA@corelogic.com
Ordered By: Test OrderedBy
Lender: Test Client
Lender Address: 1234 Client Address Suite 1 Oklahoma City, OK 73134
Appraisal Date:
Mortgage Type: Conventional
Valuation Assignment Type: Purchase
Product: Completion Report
Disclosure Date: [5/9/2017](#)
Rent Schedule: No
Neighborhood:
Sale Price: \$100,001
Prior Date:
Prior Price:
Property Type: Single Family
Property Rights: Fee Simple
Property Usage: Primary Residence
Prop Attachment: Attached
Property Legal Structure: Condominium
Construction Method: Site Built
Living Unit Excluding 2 ADU
ADU Count: 8
PUD: Yes
Land Owned in Common: Yes
Lease Description:

Satellite

Documents

Document Type	Date Uploaded
Order Documents	
Lease	01/07/2026

Details and Tools

Document Name

Express 5.pdf

Uploaded On

01/07/2026 01:31:38 PM

Uploaded By

Time: 4/16/2025 1:59 PM CST
Event: Order Changed by WESTERN TPO OC
Actions: [View Changes](#)

Time: 1/6/2025 5:59 PM CST
Event: Appraiser assignment expired
Notes: The order was not accepted by Clinton Weaver

Time: 1/3/2025 7:42 AM CST
Event: Order assigned to AMC by VMP Client ()
Notes: AMC selected by the VMP Client

Time: 1/3/2025 7:42 AM CST
Event: In Progress

This is your audit trail.

For compliance exams, every order event is recorded here for your protection.

Secure View

Property information

Address 7012 East Street Oklahoma city, OK 73115	Property Type Condominium
County Oklahoma	Property Attached Attachment
Sq ft 8000	Project Legal Condop Structure
Site size 5000	Construction Site Built Method
Prop Fee Simple rights	Living Unit 8 Excluding ADU
Legal Test Legal Description desc	ADU Count 2
Property Primary Residence Usage	PUD Yes
Directions Test Direction	Land OwnedIn Yes Common

Assignment information

Product Desktop Appraisal - Condominium		
Order Type Appraisal URAR	Loan # KNTINT070126	Vendor fee 1
Client due 1/29/2026	Disclosure Edit	Client fee Edit
Property Valuation Method Desktop Appraisal	Mortgage Type Conventional	Other ref # KANTH Test
Amount due 1	File #	Pay method Check
FHA case #	Sales price 600,000	Lender
Appraised 491,000	Lender addr	FHA Doc File ID Edit
Vendor due 1/29/2026	Valuation Assignment Type Purchase	Ordered by KNTH
Assigned to Nataliia LenderQA	QC Reviewer Edit	DU Case File ID Edit
LPA Key Edit	Fannie Mae Submission ID 666666	Freddie Mac Submission ID 8888
Order group	Issue as bid No	VMP order #
Vendor Invoice #	Vendor Invoice Amt	Rent Schedule No

Additional Changes to Secure View Only:

- We have added a new Investor Submission section for UCDP submissions. This is discussed in detail in the **Investor Submission** section of this document.
- The Start to Review button is now labeled Send to Review, since it triggers the order to be sent to our new Investigate review solution.
- Once an order is sent to Investigate, users can use the **Message** button to create a message that will be sent to the reviewer.

Business Management View:

Assignment Information

Due Date	1/22/2026	Client File #	MercEPC010726
Order Type	AppraisalURAR	Job Type	Traditional Appraisal - Condominium
Other Ref #		Sales Price	\$350,000
Mortgage Type	Conventional	Loan Amt	\$280,000
Valuation Assignment Type	Purchase	Est Value	\$350,000
Ordered By	Kelly Langdon	Client Price	
Lender	EPC Testing Client Group - Not 1264	Payment Method	Invoice
FHA #		LPA Key	
DU Case File ID		Freddie Mac Submission ID	
Fannie Mae Submission ID		Sale Date	
Order Date	1/8/2026	Priority	
Refinance		Loan # or Lender Case #	MercEPC010726
Internal Ord. #	e1b37c0a-20c3-4488-b212-2550b3b603f8	Investor Doc File ID	
Disclosure Date			
Appraised Value			
Intent to Proceed	Edit		
Received Date			
Rent Schedule	False		

Property Information

Address	999 Sunshine Dr.	Property Type;	Condominium
City	Mustang	Prop Rights	Fee Simple
State	OK	Legal Desc	
Zip Code	73064	Directions	
APN		County	Canadian
R.E. Taxes		Neighborhood	
Year Built		Tax Year	
		Special Amenities	
Sq Ft		Total Rooms	
Site Size		Bedrooms	
Characteristics		Bathrooms	
Property Usage	PrimaryResidence	Living Unit Excluding ADU	1
		ADU Count	0
		PUD	False
		Land Owned in Common	False
		Property Attachment	
		Project Legal Structure	Condominium
		Property Valuation Method	TraditionalAppraisal
		Construction Method	

Order Search/Order List View

Ready in UAT

We have added new folders to the active order folder list:

- Product Details Requested - The service provider has requested a change to the property details, and the order requires the user to make a decision before proceeding in the lifecycle.
- Under the Review Folder:
 - In Progress - The order is currently being reviewed by a reviewer in Investigate
 - Needs Reconciliation - The reviewer has indicated a second appraisal order is needed.
- Appraisal Delivered
- Pending Release

NewViewMessage

Orders

Find

Starts withContains

In fieldVMP order #

PlacedLast 30 days

OrdersAll orders

Active Order Folders

Product Details Requested62

Inspection Scheduled7

Inspection Complete7

Due Today0

Past Due2354

Override Requested0

Alternative Valuations

Inspection Ordered0

Inspection Scheduled0

Inspection Complete0

On Hold0

Awaiting Completion0

Appraisal Delivered35

In Quality Control (QC)17

In QC - Level One17

In QC - Level Two0

In QC - Level Three0

Revised Reports0

Revision - Not Requested0

UCDP

UCDP Submitted0

UCDP Failed4

UCDP Not Accepted53

Review

In Progress0

Needs Reconciliation0

FHA

FHA Submitted0

FHA Failed0

Action Required Folder Updates

Action required

Please select the orders that should be included in your Action Required folder.

Order Events: Select [All](#) | [None](#)

- ☒ Requires assignment
- ☒ Declined orders
- ☒ Conditionally declined orders
- ☒ Order not accepted in hours
- ☒ Product Details requested by vendor
- ☒ Modification requested by vendor
- ☒ No inspection scheduled in hours
- ☒ Delayed by vendor

Include orders with these events from the last day(s)

[Learn more](#)

Cancel

Save

Users can filter between legacy forms and UAD 3.6 appraisals.

The screenshot shows the Mercury Network Order Management interface. The top navigation bar includes links for Tools, Documentation, Appraisal Scope, Oxford, DG, Employee, Mercury, Appraisal Mod, and Personal. The main menu on the left includes Order Management, DataCourier, Orders, Fee Panel, Clients, Users, Preferences, Reports, Account, Payments, and Investigate. The main content area displays a table of orders with columns for Order date, Tracking #, Loan #, Status, Appraisal type, Property, Client group, Borrower, Vendor, VMP, and Payment type. The table is filtered to show 'All Open Orders (495)'. The 'Investigate' button is highlighted in the top navigation bar.

Order date	Tracking #	Loan #	Status	Appraisal type	Property	Client group	Borrower	Vendor	VMP	Payment type
01/07/2026	MERC-870296	KNTNT07012605	Pu	Residential Appraisal - Legacy Forms	7230 6th Street Oklahoma city, OK 73115			Natalia VenderOa		Direct Deposit
01/07/2026	418901-870293	KNTNT07012604	Pu	Conventional	7012 East Street Oklahoma city, OK 73115			Natalia VenderOa	✓	Check
01/07/2026	418901-870271	KNTNT07012602	Pu	Other	7012 East Street Oklahoma city, OK 73115			Natalia VenderOa	✓	Check
01/07/2026	418901-870261	KNTNT07012601	De	Commercial Appraisal	7012 East Street Oklahoma city, OK 73115			Natalia VenderOa	✓	Check
01/07/2026	418901-870257	KNTNT070126	De	Broker Price Opinion	7012 East Street Oklahoma city, OK 73115			Natalia VenderOa	✓	Check
01/06/2026	MERC-870238-870239	TEST2251270991	Re	OptVal AVM Cascade	801 Main St Oxford, MS 38655		Nita100 Story100		✓	Invoice
01/06/2026	MERC-870229	112233	De	RealCondition Report	78 New line Oklahoma City, OK 73103		Jimmy	Natalia VenderOa		Direct Deposit
01/02/2026	418901-870091	234	Pending Release	Hybrid Appraisal - Manufactured Home	458 NW 12th Street Oklahoma City, OK 73104	BenaTestUAD2Order	Bob Firstimer	Natalia VenderOa	✓	Check
01/02/2026	418901-870089	123	Pending Release	Desktop Appraisal - Manufactured Home	501 NE 122nd-O Oklahoma City, OK 73104	BenaTestUAD2Order		Natalia VenderOa	✓	Check
01/02/2026	MERC-870081	907890	Requires assignment	Uniform Residential Appraisal (FNMA 1004)	Test 123 street Newyor, NY 10006					Direct Deposit
01/02/2026	MERC-870078	8989	Declined	Desktop Appraisal - Cooperative	458 NW 12th Street Oklahoma City, OK 73104					Direct Deposit
01/02/2026	MERC-870077	907890	Requires assignment	Uniform Residential Appraisal (FNMA 1004)	Test 123 street Newyor, NY 10006					Direct Deposit

We have added an Investigate launch button to the menu at the top of the screen.

The screenshot shows the Mercury Network Order Management interface. The top navigation bar includes links for DataCourier, Orders, Fee Panel, Clients, Users, Preferences, Reports, Account, Payments, and Collateral Investigator. The 'Collateral Investigator' button is highlighted with a red box. The main content area displays a table of orders with columns for Tracking #, Status, Vendor due, Inspection, Borrower, and Property. The table is filtered to show 'All Open Orders (495)'. The 'Investigate' button is highlighted in the top navigation bar.

Tracking #	Status	Vendor due	Inspection	Borrower	Property
------------	--------	------------	------------	----------	----------

New Order Statuses

Ready in UAT

To better support the UAD 3.6 end-to-end workflow, we have introduced several new statuses.

Major Statuses:

203015 - Product Order Detail Requested	The service provider has determined one of the order details is incorrect and has requested a change to the order details. The order will stay in this exception status until a user approves or declines their requested changes.
203025 - Product Order Detail Accepted	A secure user has approved the service provider's requested property details update.
203035 - Product Order Detail Declined	A secure user has declined the service provider's requested property details update.
301035 - Delivered	The product has been delivered by the service provider.
704100 - Review in Progress	Investigate review is in progress.
704103 - Review Complete	Investigate review has been completed.
300100-Pending Release	If a customer has our new Use Pending Release feature enabled, the order will move to the Pending Release status instead of immediately transitioning to Completed after UCDP submission and/or Investigate for review. A user must manually move the order to the Completed status once their manual activities are complete.

Minor Statuses:

202003 - Document Upload Failed	The vendor has uploaded a zip file that failed the file validation rules check.
700050 - Fannie Mae Submission Successful	The UCDP submission to Fannie Mae was successful.
700055 - Fannie Mae Submission Not Successful	The UCDP Submission to Fannie Mae encountered a fatal finding.
700065 - Freddie Mac Submission Successful	The UCDP submission to Freddie Mac was successful.
700060 - Freddie Mac Submission Not Successful	The UCDP Submission to Freddie Mac encountered a fatal finding.
704101 - Review Platform - Message	A message was sent from the Mercury Network platform to Investigate.
700001- UCDP Submission Error	The submission to UCDP has encountered an unknown error.

Note: All UAD 3.6 secure orders will now move to a Delivered status once the service provider uploads the appraisal. If your system is configured to sync the **Pending Quality Review** status to your client order, the client order will move to **Pending Quality Review** when the secure order is in a **Delivered** status.

Reporting

Configuration

We're excited to announce a new suite of **standardized reports** specifically designed for customers who have migrated to **UAD 3.6!**

These powerful reports were developed after **extensive analysis** of the reporting utilized across our entire customer base, ensuring you get the essential insights you need.

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.

The new reporting suite gives you simplified, targeted access to the key metrics that drive your business.

The Standard Reports section will display a list of approximately 30 standard reports that apply to all pipelines, both legacy and UAD 3.6. From this section, you can run a report on demand, or you can set up a subscription for the report.

- **Run Now:** The user will be presented with the parameters applicable to that report. Once the parameters are complete, the report will run immediately and become available for download.

Running Report

Accounting - Credit Card Activity

Configure report parameters

Select Parameters

Time Frame *

Select Time Frame

Number of Days, Weeks, or Months

Number of Days, Weeks, or Months

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

As-Of Date

mm/dd/yyyy

States to Include *

Select States to Include

Cancel

Run Now

- **Subscription:** The user will be presented with the parameters applicable to that report.

Anton LenderQA

Mercury Network

Standard Reports

DataCourier

Orders

Fee Panel

Clients

Users

Preferences

Reports

Account

Payments

Investigate

Help

Contact Support

What's New

Terms of Use

Sign Out

Standard Reports

Help

Reports allow you to see data on order management, accounting and performance

Search by Report Name, Description

Report Name	Description	Subscribed
Accounting - Credit Card Activity	-	Run Now Subscription
User Detail Report	-	Run Now Subscription



New Subscription

Subscription Name	Modified by	Schedule	Last Run
No records available			

[+ Add New](#)

The screenshot shows the 'Accounting - Credit Card Activity' report configuration page. At the top, a progress bar indicates three steps: Step 1 'Select Subscription' (completed with a checkmark), Step 2 'Parameters' (active with a blue circle), and Step 3 'Schedule'. Below the progress bar, the title 'Accounting - Credit Card Activity' is followed by the instruction 'Configure report parameters'. A text input field for 'Subscription Name' contains the placeholder 'Enter subscription name'. Below this is a 'Select Parameters' section with several fields: 'Time Frame' (a dropdown menu showing 'Select Time Frame'), 'Number of Days, Weeks, or Months' (a text input with the same placeholder), 'Start Date' (a date input with the format 'mm/dd/yyyy' and a calendar icon), 'End Date' (a date input with the format 'mm/dd/yyyy' and a calendar icon), 'As-Of Date' (a date input with the format 'mm/dd/yyyy' and a calendar icon), and 'States to Include' (a text input with the placeholder 'Select States to Include'). At the bottom of the form, there are three buttons: 'Cancel', 'Previous', and 'Schedule'.

- The user will then be asked to set up when and how often the report should run, as well as the recipients.

Step 1
Select Subscription

Step 2
Parameters

Step 3
Schedule

Accounting - Credit Card Activity

Set up your periods and parameters

Select your repeating period

Repeat every

1

week

on

M

T

W

T

F

S

S

Start date

05/27/2026

Start time

7:00 PM

Email to send to

Enter Email

Cancel

Previous

Submit

Standard Reports Include:

Category	Report Name
Order Pipeline	Open Orders
Users	VMP Clients
Accounting	Credit Card Activity
Order Pipeline	New Orders
Order Pipeline	Completed Orders
Order Pipeline	Cancelled Orders
Order Pipeline	On Hold
Order Pipeline	Rush
Order Pipeline	Order Sources
Order Pipeline	Bid Orders
Order Pipeline	All Orders
TurnTime	Vendor Turntime
TurnTime	Staff Turntime
Users	User Permissions
Vendor/Fee Panel	Vendor Contacts
Vendor/Fee Panel	Vendor Coverage Area
Vendor/Fee Panel	Vendor Statistics and Ratings
Vendor/Fee Panel	Vendor Order Groups
Vendor/Fee Panel	Vendor Products
Vendor/Fee Panel	Vendor Audit Report
Vendor/Fee Panel	Ineligible Vendors
Vendor/Fee Panel	Signing Appraisers – out of dtUploadCounter_Info
Order Pipeline	Sure Receipts
Order Pipeline	ROV
Accounting	RealView Delivery
Accounting	Optival
Accounting	Real Condition
Accounting	Appraisal Payments
Accounting	Unpaid Orders

Other Administrative Configurations

VMP Client Status Mapping

Ready in UAT

Configuration

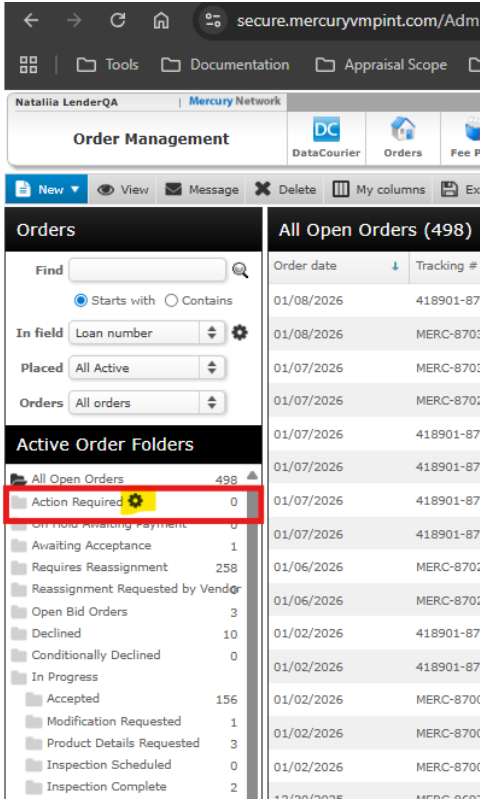
Customers should review the newly added statuses and, if desired, configure them to sync with VMP Client orders.

Status Mapping to Action Required Folder

Ready in UAT

Configuration

Customers will need to update configurations to map new statuses to the **Action Required** folder if desired.



Property Characteristics

Configuration

Ready in UAT

Customers who currently differentiate certain order characteristics by product will need to use additional data points for UAD 3.6 orders. For instance, there is no product specific to 203k, HomeStyle renovation, or Reverse mortgage.

For a legacy form 203k, you order the Uniform Residential Appraisal FHA 203k product.

For UAD 3.6 203k, you place an order with a **Valuation Method** of Traditional Appraisal, **Property Type** of - Single Family and a **Property Characteristic** of 203k.

In this way, customers can use the **Property Characteristics** field to create custom characteristics that differentiate fees or requirements that must be specified for the vendor and are not accounted for in any standard order fields.

Customers should review whether they need additional options in their Property Characteristics and add them via the Configure Order Form feature.

Order Form Configuration

Ready in UAT

Configuration

Customers should review whether they need additional options in their Property Characteristics and add them via the Configure Order Form feature.

Note: The additional fields added to the UAD 3.6 Residential Appraisal order form are not configurable at this time.

Configure Order Form

☒ Allow clients to enter fee

☐ Enable global login

☐ Require clients to select AMC/Firm

☐ Provide disclosure tracking

☐ Require sales contract

Order Requirements

Acceptable Payment Methods

☒ ACH

☒ C.O.D.

☒ Check

☒ Credit Card

☒ CC to Vendor

☒ Deferred CC

☒ Invoice

☒ Money order

☒ Net 30

☐ PayPal

Require Credit Card Payments for Clients

Edit Required List

☐ Require for all clients.

☐ Require for all new clients.

Show	Require	Section / Field	Custom Label	Default Text	Constraints
☒		Broker Contact Info	Broker Contact Info		Set Defaults
		Payment Information			
☒	☒	First Name	First Name		
☒	☒	Last Name	Last Name		
☒		Street Address	Street Address		
☒		City	City		
☒		State	State		
☒	☒	Zip	Zip		
☒		E-mail	E-mail		
		Property Information			
☒		Prop Type	Prop Type		☐
☒		Prop Rights	Prop Rights		☐
☒		Legal Desc	Legal Desc		
☒		Directions	Directions		
☒		Square Footage	Square Footage		
☒		Prop Characteristics	Characteristics		☐

User Guide Documentation

We are excited to introduce our new User Guide documentation tool. We are implementing a new article-based user guide repository, along with an integrated widget that will enable users to ask questions and search for information across our user guide articles from any screen in Mercury Network.

Sunset Features/Features Not Available for UAD 3.6

VMP Client Order Form Configuration

Preferences → VMP Client Order Setup → Configure Order Form. At launch, customers will not be able to configure newly added UAD 3.6 fields.

VMP Client Product Naming

Ready in UAT

Configuration

For UAD 3.6 orders, customers cannot customize the names of available products.

Product Information	
Default VMP Client Products	Mercury Network Product
✓ Appraisal Update/Inspection of Repairs & Recertification Report (FNMA 1004D)	Appraisal Update/Inspection of Repairs & Recertification Report (FNMA 1004D)
✓ Appraisal Update/Inspection of Repairs (FNMA 1004D)	Appraisal Update/Inspection of Repairs (FNMA 1004D)
✓ Appraisal Update/Recertification (FNMA 1004D)	Appraisal Update/Recertification (FNMA 1004D)
✓ Commercial Appraisal Report	Commercial Appraisal Report
✓ Commercial Appraisal Review	Commercial Appraisal Review
✓ Construction Inspection Report	Construction Inspection Report
✓ Conventional Conversion Appraisal Update	Conventional Conversion Appraisal Update
✓ FHA Appraisal (FNMA 1004)	FHA Appraisal (FNMA 1004)
✓ Multi-Family Appraisal (FNMA 1025)	Multi-Family Appraisal (FNMA 1025)
✓ Multi-Family Investment (FNMA 1025 and 216)	Multi-Family FHA Investment (FNMA 1025 and 216)
OptiVal	OptiVal AVM Cascade
OptiVal+	OptiVal+
RealCondition Report	RealCondition Report
✓ Single Family FHA Investment (1004, 1007, and 216)	Single Family FHA Investment (1004, 1007, and 216)
✓ Testing6075	Condo Appraisal (1073 Desktop)
✓ Uniform Residential Appraisal (FNMA 1004)	Uniform Residential Appraisal (FNMA 1004)
✓ Uniform Residential Appraisal FHA 203k (FNMA 1004)	Uniform Residential Appraisal FHA 203k (FNMA 1004)
✓ URAR 1004 UAD	Uniform Residential Appraisal (FNMA 1004)

Vendor Fees in the Client and Client Group Profiles

With the addition of our new fees module to manage UAD 3.6 vendor fees and client prices, customers will still be able to differentiate vendor fees and client prices by client and client group. However, these settings are all managed through the administrative module; you will no longer specify fees within the client and client group profiles.

Business Management Features

Vendor Fees: All UAD 3.6 fees are configured through the administrative module. Fee tables set up by client group in Business Management do not apply to UAD 3.6 orders.

Order Placement: UAD 3.6 orders cannot be placed through the Business Management module.

Order Updates: Due to low utilization of the Business Management feature, the newly added 3.6 fields are not available in the Business Management “Edit Page” screen.

UCDP Doc File ID: This field has been renamed to Investor Doc File ID and cannot be edited for UAD 3.6 orders.

Product Ordering Customization at the Client Group Level

Due to the massive changes in how appraisals are now ordered through a collection of data points and not an appraisal form number, there is currently no way to specify which UAD 3.6 products are available to order at the client group level.

Bulk Ordering

For our initial launch, bulk ordering will not be available for UAD 3.6 appraisals. We do not yet have a timeline for when/if we will add this feature.

UCDP Manual/Automated Submission Settings by Client Group

For UAD 3.6, there is one global setting for whether UCDP submission is manual or automated. This is not currently configurable at the client group level.

PDF and XML Appraisals

All UAD 3.6 appraisals must be submitted using the UAD zip file, which includes the MISMO 3.6 XML. An appraisal PDF or XML alone is not accepted.

Standalone Completion Reports and Update Reports

Completion Reports and Update Reports attached to a UAD 3.6 appraisal can only be placed as a child order; the appraisal's parent order tracking number is required. These can continue to be ordered as stand-alone products for legacy forms.

Require Sales Contract on Purchases by Product - Encompass EPC

For UAD 3.6 EPC orders, customers can enable or disable the requirement for purchase orders; either the purchase contract is required for all products on purchases, or it is not. This only affects UAD 3.6 orders placed through the Encompass EPC integration.

QC Folders and WorkBench Rules

All valuation review activities are now managed within the Investigate Review solution, including custom workflow rules. Workbench review rules will continue to function as usual for legacy forms, but some will not be available for UAD 3.6 orders. Further details will be coming soon.

Appendix A

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 collectively describe the scope of work, replacing 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

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.

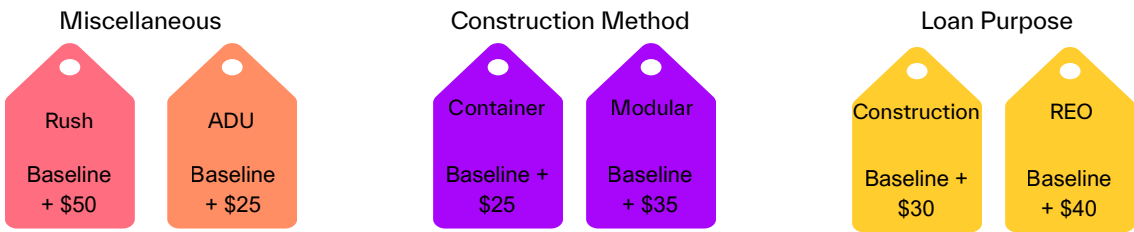
For Example*:

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.

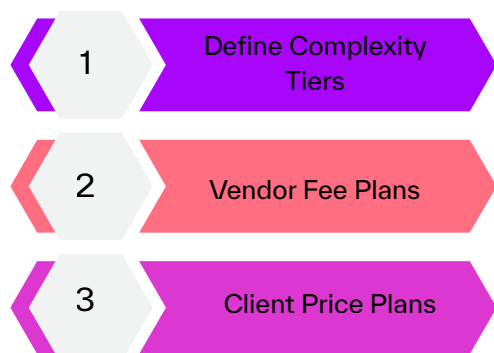
For UAD 3.6, you place an order with a **Valuation Method** of Traditional Appraisal, **Property Type** of - Single Family. and **Rent Schedule Indicator** field set to on/yes. The fee will be calculated as the base fee for a Traditional Appraisal - Single Family product plus the add-on fee for the rent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

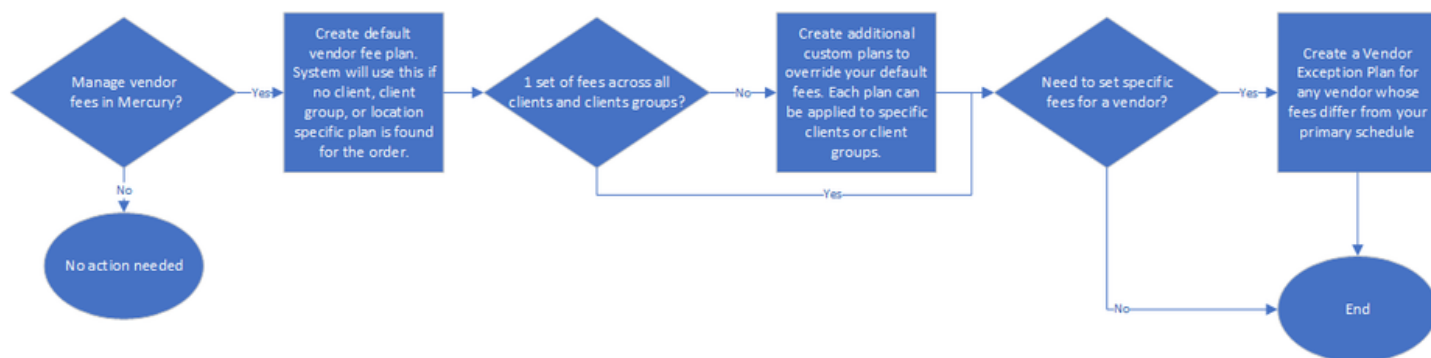
Which order data points can be used for add-on fees?

- 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

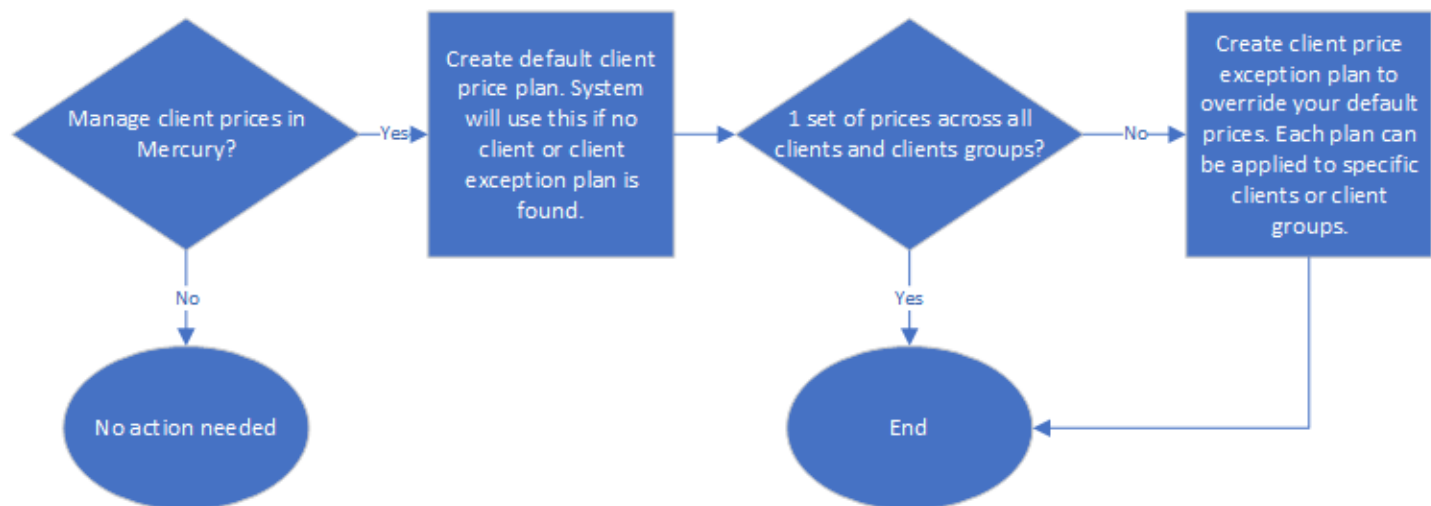
Creating Fee and Price Plans



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.

Create Fee Plan

Plan Details

Client

Client Group

Product Fees

Add Plan Details

Fee Plan Name

☐ Default Plan

Base Fees

☒ Use vendor's default fees

☐ Set fees as a percentage of the client price

☐ Manually add fees

Cancel

Next

Step 3: Select Clients or Client Groups

Specify all. Since this is your default plan, you want it to apply to everyone if no more specific plan exists.

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Clients

☐ Current clients

☐ Current and future clients

☒ Manually add clients

Available

Josh

☐ Select All

☐ Josh Sam

☐ Josh Hernandez

☐ Josh Kim

☐ Customer Name

☐ Customer Name

☐ Customer Name

☐ Customer Name

>

<

Selected

Cancel

Back

Next

Step 4: Select a product and geography combination, and add base fees (Only applicable to manually add fees method)

Select a product, and specify the locations where this product's fees will apply. Then specify the base fee for each tier. If a product has different fees in different locations, add it as a separate entry for each unique set of fees. You should continue adding product and location combinations until all products and locations in your service area are covered.

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

Desk

DesktopAppraisal - Single Family

DesktopAppraisal - Multi-Family

DesktopAppraisal - Condo

DesktopAppraisal - Manufactured

DesktopAppraisal - Cooperative

DesktopAppraisal - Other

ExteriorAppraisal - Single Family

\$

\$

\$

+ Add Another Product Fee

Cancel

Back

Save Plan

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

Search or select a product

Geographic Location *

+ Add Location

State	County	City	Zipcode	Delete
-------	--------	------	---------	--------

Base Fees *

Additional Fees

Value Tier 1 (\$0 - \$453,100)

\$

Value Tier 2 (\$453,100.01 - \$871,450)

\$

Value Tier 3 (\$871,450.01 - infinity)

\$

+ Add Another Product Fee

Cancel

Back

Save Plan

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

DesktopAppraisal - Single Family

Geographic Location *

+ Add Location

State	County	City	Zipcode	Delete
Alabama	All	All	All	
Alaska	All	All	All	
Arizona	All	All	All	
Arkansas	All	All	All	
California	All	All	All	
Colorado	All	All	All	
Connecticut	All	All	All	
Delaware	All	All	All	
Florida	All	All	All	
Georgia	All	All	All	

Show 10 of 125 locations

< Page 1 of 5 >

Base Fees *

Additional Fees

Value Tier 1 (\$0 - \$453,100)

\$ 500

Value Tier 2 (\$453,100.01 - \$871,450)

\$ 1,000

Value Tier 3 (\$871,450.01 - infinity)

\$ 1,500

+ Add Another Product Fee

Cancel

Back

Save Plan

Step 5: Define Add-on Fees (Only applicable to manually add fees method)

Specify add-on fees for any order data points that, when true for the order, increase the fee.

Add Product Fee

Product *

DesktopAppraisal - Single Family

Geographic Location *

+ Add Location

State <i>11</i>	County <i>11</i>	City <i>11</i>	Zipcode <i>11</i>	Delete
Alabama	All	All	All	
Alaska	All	All	All	
Arizona	All	All	All	
Arkansas	All	All	All	
California	All	All	All	
Colorado	All	All	All	
Connecticut	All	All	All	
Delaware	All	All	All	
Florida	All	All	All	
Georgia	All	All	All	

Show 10 of 125 locations

Base Fees *

Additional Fees

Construction Method Type

Container

\$

Manufactured

\$

Modular

\$

On Frame Modular

\$

Site Built

\$

3D Printing Technology

\$

Other

\$

Mortgage Type

Property Usage Type

Living Unit Excluding ADU Count

Valuation Assignment Type

Miscellaneous

+ Add Another Product Fee

Cancel

Back

Save Plan

Spreadsheet Upload Approach:

Step 1: Create New Plan:

Create a new default plan. Every customer needs a default vendor fee plan, and you can only have one. Provide a name, and check the “Default Plan” box.

Select the methodology (these options are the same as the ones described above in the manual creation section). Mark it as the default.

Vendor Fee Plans

[Feedback](#) [Help](#)

Fee plans allow you to pre-set the recommended fees paid to the vendor for any geographical area for any service.

Fee Plans

Search by plan, client or client group

History Log

Create New Plan

Bulk Upload

Plan Name <i>11</i>	Status <i>11</i>	# of Clients <i>11</i>	# of Client Groups <i>11</i>
---------------------	------------------	------------------------	------------------------------



Add Plan Details

Fee Plan Name

Enter plan name

☐ Default Plan

Base Fees

☒ Use vendor's default fees

☐ Set fees as a percentage of the client price

☐ Manually add fees

Step 2: Prepare the spreadsheet

Download the client group template and populate the template as needed.

Use Vendor Fees

When you create a plan using a “use vendor fees” or “set fees as a percentage of client price” methodology, the spreadsheet collects the list of products and geographic areas to which the plan applies.

Product	State	County	City	ZipCode	
Desktop Appraisal - Single Family	OK				
Desktop Appraisal - Single Family TX		Dallam County			
Desktop Appraisal - Single Family TX		Sherman County			
Desktop Appraisal - Single Family TX		Hansford County			
Desktop Appraisal - Single Family TX		Ochiltree County			
Desktop Appraisal - Single Family TX		Lipscomb County			
Desktop Appraisal - Single Family TX		Hartley County	Dalhart		
Desktop Appraisal - Condominiur	OK				
Desktop Appraisal - Condominiur TX		Dallam County			
Desktop Appraisal - Condominiur TX		Sherman County			
Desktop Appraisal - Condominiur TX		Hansford County			
Desktop Appraisal - Condominiur TX		Ochiltree County			
Desktop Appraisal - Condominiur TX		Lipscomb County			
Desktop Appraisal - Condominiur TX		Hartley County	Dalhart		

Use Manual Advanced Fees

When you create a plan using a “manual fee creation” methodology, the spreadsheet collects the list of products and geographic areas to which the plan applies. It also collects the base fees and add-on fees for each product.

Product	State	County	City	ZipCode	Tier 1 Fee	Tier 2 Fee	Tier 3 Fee	Tier 4 Fee	Tier 5 Fee	Tier 6 Fee	Tier 7 Fee	Tier 8 Fee	Tier 9 Fee	Container Fee	Manufactured Fee	Modular Fee	On Frame Modular Fee	Site Fee
Desktop Appraisal - Single Family OK					400	450	500										25	
Desktop Appraisal - Single Family TX		Dallam County			425	475	525										25	
Desktop Appraisal - Single Family TX		Sherman County			425	475	525										25	
Desktop Appraisal - Single Family TX		Hansford County			425	475	525										25	
Desktop Appraisal - Single Family TX		Ochiltree County			425	475	525										25	
Desktop Appraisal - Single Family TX		Lipscomb County			425	475	525										25	
Desktop Appraisal - Single Family TX		Hartley County	Dalhart		450	500	550										25	
Desktop Appraisal - Condominiur OK					390	440	490										25	
Desktop Appraisal - Condominiur TX		Dallam County			420	470	520										25	
Desktop Appraisal - Condominiur TX		Sherman County			420	470	520										25	
Desktop Appraisal - Condominiur TX		Hansford County			420	470	520										25	
Desktop Appraisal - Condominiur TX		Ochiltree County			420	470	520										25	
Desktop Appraisal - Condominiur TX		Lipscomb County			420	470	520										25	
Desktop Appraisal - Condominiur TX		Hartley County	Dalhart		445	495	545										25	

In both cases, after completing the “Plan” tab of the spreadsheet, navigate to the “List” tab. Enter an * under CClient Groups to indicate that this default plan applies to all clients.

Specifying Client Groups

F7				
	A	B		
1	Client Groups			
2	*			
3				
4				
5				

Step 3: Upload spreadsheet

After the spreadsheet template is filled out, upload it.



Upload Plan Details

NOTE: Required fields on the spreadsheet template have column headers highlighted in Red, while optional fields have column headers highlighted in Green. You must populate both the Plan and the List tab. Please click on the Instructions link below.

Important: Click on [Instructions](#) to view the file requirements.

Use the [1 - Vendor Fees with Clients.xlsx](#) to fill out your spreadsheet
Use the [1 - Vendor Fees with Client Groups.xlsx](#) to fill out your spreadsheet



Drop file here to upload

— or —

Browse file

We accept .xlsx
under 50 MB

1 - Vendor Fees - Advanced with Client Groups.xlsx 0%

0 KB of 22.24KB uploaded

Remove

Excel file "1 - Vendor Fees - Advanced with Client Groups.xlsx" added successfully

Cancel

Previous

Save Fee Plan

Click **Save Fee Plan**

Step 1
DetailsStep 2
Confirmation

Upload Plan Details

NOTE: Required fields on the spreadsheet template have column headers highlighted in Red, while optional fields have column headers highlighted in Green. You must populate both the Plan and the List tab. Please click on the Instructions link below.

Important: Click on [Instructions](#) to view the file requirements.

Use the [1 - Vendor Fees - Advanced with Clients.xlsx](#) to fill out your spreadsheet

Use the [1 - Vendor Fees - Advanced with Client Groups.xlsx](#) to fill out your spreadsheet


Drop file here to upload
— or —
[Browse file](#)
We accept .xlsx
under 50 MB

1 - Vendor Fees - Advanced with Client Groups.xlsx 0%

0 KB of 22.24KB uploaded

Remove

Saved Successfully

[Cancel](#)[Previous](#)[Save Fee Plan](#)

Once the plan has been uploaded and saved, the validation process begins. You must check the main screen to see the status of your spreadsheet upload and confirm that your plan passed the validation check and was created successfully. If the plan validation failed, the user who uploaded the spreadsheet will receive an email notification that the plan was not successfully created. In the UI, you will see an icon indicator in the status column. The validation failures will be documented in the history log.

Vendor Fee Plans

[Feedback](#) [Help](#)

Fee plans allow you to pre-set the recommended fees paid to the vendor for any geographical area for any service.

[Fee Plans](#)

Search by plan, client or client group					History Log		Create New Plan
Plan Name	Status	# of Clients	# of Client Groups				
JKDefault2		0	0		View Fees	Delete	
Brisbee		0	0		View Fees	Delete	

To edit a fee plan:

- Navigate to the fee plan, click View Fees, and then export the existing fee plan.
- Update the fee plan data as needed.

- From that same page, upload the updated spreadsheet. This will replace the existing fee plan with the new data from the updated spreadsheet.

[Back to Vendor Fee Plans](#)

JKVendCT3CGroups2

1 Client Group(s)

Bulk Upload

Export

Filters:

Products

Locations

Clear All

Product Name	Geographic Location				Base Fee									Construction Method Type			
	State	County	City	ZipCode	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	Tier 6	Tier 7	Tier 8	Tier 9	Container	Manufactured	Modular	On Frame Mo
Desktop Appraisal - Single Family	OK	ALL	ALL	ALL	\$400.00											\$25.00	
Desktop Appraisal - Single Family	TX	Dallas	ALL	ALL	\$425.00											\$25.00	
Desktop Appraisal - Single Family	TX	Sherman	ALL	ALL	\$425.00											\$25.00	
Desktop Appraisal - Single Family	TX	McLennan	Waco	ALL	\$450.00											\$25.00	
Desktop Appraisal - Condominium	OK	ALL	ALL	ALL	\$390.00											\$25.00	
Desktop Appraisal - Condominium	TX	Dallas	ALL	ALL	\$420.00											\$25.00	
Desktop Appraisal - Condominium	TX	Sherman	ALL	ALL	\$420.00											\$25.00	
Desktop Appraisal - Condominium	TX	McLennan	Waco	ALL	\$420.00											\$25.00	

Client or Client Group Specific Vendor Fee Plans



Step 1: Select Methodology

When creating a vendor fee plan, you will name it and define your vendor fee methodology. You can choose to use the assigned vendor’s default fees, calculate vendor fees as a percentage of the client prices, or create a custom advanced fee plan.

Create Fee Plan

Plan Details

Client

Client Group

Product Fees

Add Plan Details

Fee Plan Name

☐ Default Plan

Base Fees

☒ Use vendor's default fees

☐ Set fees as a percentage of the client price

☐ Manually add fees

Cancel

Next

Step 2: Select Clients or Client Groups

Specify which clients or client groups this plan applies to (not both).

Select One: You may assign a plan to a list of clients *or* client groups, but not both.

No Duplicates: Each client or group can only belong to one custom plan at a time.

The screenshot shows the 'Create Fee Plan' dialog box with a progress bar at the top indicating four steps: Plan Details (completed), Client (current step), Client Group, and Fees. The 'Add Clients' section is active, showing three radio button options: 'Current clients', 'Current and future clients', and 'Manually add clients' (which is selected). Below these options, there are two columns: 'Available' and 'Selected'. The 'Available' column contains a search bar with 'Josh' entered, a 'Select All' checkbox, and a list of client names with checkboxes: 'Josh Sam', 'Josh Hernandez', 'Josh Kim', and three 'Customer Name' entries. The 'Selected' column is currently empty. Navigation buttons at the bottom include 'Cancel', 'Back', and 'Next'.

Step 3: Select a product and geography combination. Add base fees (only applicable to manually add fees method).

Select a product, and specify the locations where this product's fees will apply. Then specify the base fee for each tier. If a product has different fees in different locations, add it as a separate entry for each unique set of fees. You should continue adding product and location combinations until all products and locations in your service area are covered.

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

Desk

DesktopAppraisal - Single Family

DesktopAppraisal - Multi-Family

DesktopAppraisal - Condo

DesktopAppraisal - Manufactured

DesktopAppraisal - Cooperative

DesktopAppraisal - Other

ExteriorAppraisal - Single Family

\$

\$

\$

+ Add Another Product Fee

Cancel

Back

Save Plan

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

Search or select a product

Geographic Location *

+ Add Location

State 11	County 11	City 11	Zipcode 11	Delete

Base Fees *

Additional Fees

Value Tier 1 (\$0 - \$453,100)

Value Tier 2 (\$453,100.01 - \$871,450)

Value Tier 3 (\$871,450.01 - infinity)

\$

\$

\$

+ Add Another Product Fee

Cancel

Back

Save Plan

Create Fee Plan

Plan Details

Client

Client Group

Fees

Add Product Fee

Product *

DesktopAppraisal - Single Family

Geographic Location *

+ Add Location

State <i>1</i>	County <i>1</i>	City <i>1</i>	Zipcode <i>1</i>	Delete
Alabama	All	All	All	
Alaska	All	All	All	
Arizona	All	All	All	
Arkansas	All	All	All	
California	All	All	All	
Colorado	All	All	All	
Connecticut	All	All	All	
Delaware	All	All	All	
Florida	All	All	All	
Georgia	All	All	All	

Show 10 of 125 locations

< Page 1 of 5 >

Base Fees * Additional Fees

Value Tier 1 (\$0 - \$453,100)

Value Tier 2 (\$453,100.01 - \$871,450)

Value Tier 3 (\$871,450.01 - infinity)

\$ 500

\$ 1,000

\$ 1,500

+ Add Another Product Fee

Cancel

Back Save Plan

Step 4: Define Add-on Fees (Only applicable to manually add fees method)

Specify add-on fees for any order data points that, when true for the order, increase the fee.

Add Product Fee

Product *

DesktopAppraisal - Single Family

Geographic Location *

+ Add Location

State <i>1</i>	County <i>1</i>	City <i>1</i>	Zipcode <i>1</i>	Delete
Alabama	All	All	All	
Alaska	All	All	All	
Arizona	All	All	All	
Arkansas	All	All	All	
California	All	All	All	
Colorado	All	All	All	
Connecticut	All	All	All	
Delaware	All	All	All	
Florida	All	All	All	
Georgia	All	All	All	

Show 10 of 125 locations

< Page 1 of 5 >

Base Fees * Additional Fees

Construction Method Type

Container

Manufactured

Modular

\$

\$

\$

On Frame Modular

Site Built

3D Printing Technology

\$

\$

\$

Other

\$

Mortgage Type

Property Usage Type

Living Unit Excluding ADU Count

Valuation Assignment Type

Miscellaneous

+ Add Another Product Fee

Cancel

Back Save Plan

Spreadsheet Upload Approach:

Step 1: Create New Plan:

Create a new plan. Provide a name, and select the methodology (these options are the same as the ones described above in the manual creation section).

Vendor Fee Plans

Feedback

Help

Fee Plans

Search by plan, client or client group

History Log

Create New Plan

Bulk Upload

Plan Name

Status

of Clients

of Client Groups

Create Fee Plan

Step 1
Details

Step 2
Confirmation

Add Plan Details

Fee Plan Name

Enter plan name

☐ Default Plan

Base Fees

☒ Use vendor's default fees

☐ Set fees as a percentage of the client price

☐ Manually add fees

Cancel

Next

Step 2: Prepare the spreadsheet

Read the instructions and download the appropriate template. Populate the template as needed.

Use Vendor Fees

When you create a plan using a “use vendor fees” methodology, the spreadsheet collects the list of products and geographic areas to which the plan applies.

Product	State	County	City	ZipCode
Desktop Appraisal - Single Family	OK			
Desktop Appraisal - Single Family	TX	Dallam County		
Desktop Appraisal - Single Family	TX	Sherman County		
Desktop Appraisal - Single Family	TX	Hansford County		
Desktop Appraisal - Single Family	TX	Ochiltree County		
Desktop Appraisal - Single Family	TX	Lipscomb County		
Desktop Appraisal - Single Family	TX	Hartley County	Dalhart	
Desktop Appraisal - Condominiur	OK			
Desktop Appraisal - Condominiur	TX	Dallam County		
Desktop Appraisal - Condominiur	TX	Sherman County		
Desktop Appraisal - Condominiur	TX	Hansford County		
Desktop Appraisal - Condominiur	TX	Ochiltree County		
Desktop Appraisal - Condominiur	TX	Lipscomb County		
Desktop Appraisal - Condominiur	TX	Hartley County	Dalhart	

Use Manual Advanced Fees

When you create a plan using a “manual fee creation” methodology, the spreadsheet collects the list of products and geographic areas to which the plan applies. It also collects the base fees and add-on fees for each product.

Product	State	County	City	ZipCode	Tier 1 Fee	Tier 2 Fee	Tier 3 Fee	Tier 4 Fee	Tier 5 Fee	Tier 6 Fee	Tier 7 Fee	Tier 8 Fee	Tier 9 Fee	Container Fee	Manufactured Fee	Modular Fee	On Frame Modular Fee	Site Fee
Desktop Appraisal - Single Family	OK				400	450	500										25	
Desktop Appraisal - Single Family	TX	Dallam County			425	475	525										25	
Desktop Appraisal - Single Family	TX	Sherman County			425	475	525										25	
Desktop Appraisal - Single Family	TX	Hansford County			425	475	525										25	
Desktop Appraisal - Single Family	TX	Ochiltree County			425	475	525										25	
Desktop Appraisal - Single Family	TX	Lipscomb County			425	475	525										25	
Desktop Appraisal - Single Family	TX	Hartley County	Dalhart		450	500	550										25	
Desktop Appraisal - Condominiur	OK				390	440	490										25	
Desktop Appraisal - Condominiur	TX	Dallam County			420	470	520										25	
Desktop Appraisal - Condominiur	TX	Sherman County			420	470	520										25	
Desktop Appraisal - Condominiur	TX	Hansford County			420	470	520										25	
Desktop Appraisal - Condominiur	TX	Ochiltree County			420	470	520										25	
Desktop Appraisal - Condominiur	TX	Lipscomb County			420	470	520										25	
Desktop Appraisal - Condominiur	TX	Hartley County	Dalhart		445	495	545										25	

In both cases, you can apply the plan to specific clients or specific client groups.

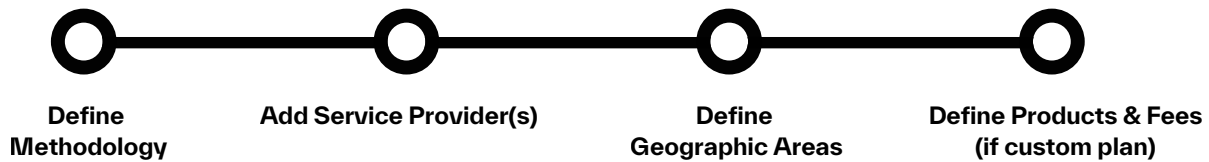
Specifying Clients

	A	B	C
1	First Name	Last Name	Email
2	John	Smith	john.smith@test.com
3	Jack	Johnson	jack.johnson@test.com
4	Sally	Jones	sally.jones@test.com
5	Jennifer	Roberts	jennifer.roberts@test.com
6			

Specifying Client Groups

	A	B
1	Client Groups	
2	HomeVantage - 1026	
3	HomeVantage - 1027	
4	HomeVantage - 1028	
5	HomeVantage - 1501	
6	HomeVantage - 2005	
7	HomeVantage - 5003	
8		

Vendor Exception Fee Plans



When needed, you can create exception plans that will override these **Fee Plans** for orders associated with specific vendors.

You create the plan in a similar way to creating vendor fee plans, but instead of selecting the client or client groups the plan applies to, you select the service provider(s). When the system calculates an order's fee, it checks whether a vendor exception fee plan is associated with the assigned service provider. If not, it will look for the standard vendor fee plan that applies to the order.

Client Price Plans



Creating client price plans is similar to creating a vendor fee plan.

Step 1: Select Methodology

Give your plan a name. Your only methodology option is manual feel creation (advanced fees).

Create Fee Plan ×

Step 1
Details

Step 2
Confirmation

Add Plan Details

Fee Plan Name

Harover Branch

Base Fees

☒ Manually add fees

Cancel

Next

Step 2: Specify clients/client groups

Step 3: Define Geography

Step 4: Define Products and Base Prices (Only applicable to advanced fee plans)

Step 5: Define Add-on Prices (Only applicable to advanced fee plans)

Specify add-on prices for any order data points that, when true for the order, increase the price.

Will Cotality Assist Us In Configuring UAD 3.6 Fee and Price 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 where 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.

Appendix B

Lender Panel Management for UAD 3.6

How will Cotality support me and my appraisers in confirming UAD 3.6 readiness?

Cotality is ready to assist you in determining appraiser readiness for UAD 3.6 appraisal delivery. We have developed a multi-pronged approach to communicating with your appraiser panel and confirming their readiness.



Outreach

- Letter to your appraiser panel as a step in your migration engagement with our client delivery team.
- "Opt Out" link enabling them to opt out of this update if they are not ready or do not plan to support UAD 3.6 appraisals.
- In-Product pop-ups/communication



Appraiser Training

- Appraisers will be armed with updated user guides for UAD 3.6 updates
- Appraisers using the a la mode software have access to detailed training on the dynamic URAR appraisal



Partnership with a la Mode

- Appraiser readiness score to assist in managing completion of training, software updates, etc.
- As appraisers complete their readiness and training attestation, their profile will automatically be updated for UAD 3.6 readiness.

Client Migration

As part of our migration activities, Mercury Network will send out communications and post in-product announcements to all appraisers using Mercury Network to remind them to update their vendor profile to reflect UAD 3.6 eligibility.

Additionally, the **Vendor** section of Mercury will feature a report to help users track panel appraisers who are not yet eligible for UAD 3.6 products. This report lists individual appraisers and their contact information.

Appraiser Training

As part of our appraiser readiness program, Cotality will be providing training and updated user guides to our appraisers.

Version Tracking

Version	Publish Date	Impacted Sections
Version 1	1/13/2026	
Version 1.1	2/12/2026	Added additional detail to Appendix Added screenshot to revision request formatting section Added UCDP Manual/Automated to Sunset Features section Updated Append A: Fees
Version 1.2	5/27/2026	Added additional detail to the Reporting section Added Ready in UAT tag to Revision Request Formatting, Automated revision requests, Pending Release status, and Property Characteristics.