

# DataTree<sup>®</sup> ACADEMY

## PROPERTY OWNERSHIP VALUATION REPORTS

Rev. 20201015



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**Overview**

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

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

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

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

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

## Available Reports

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

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

Available Reports as of May 2017:

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

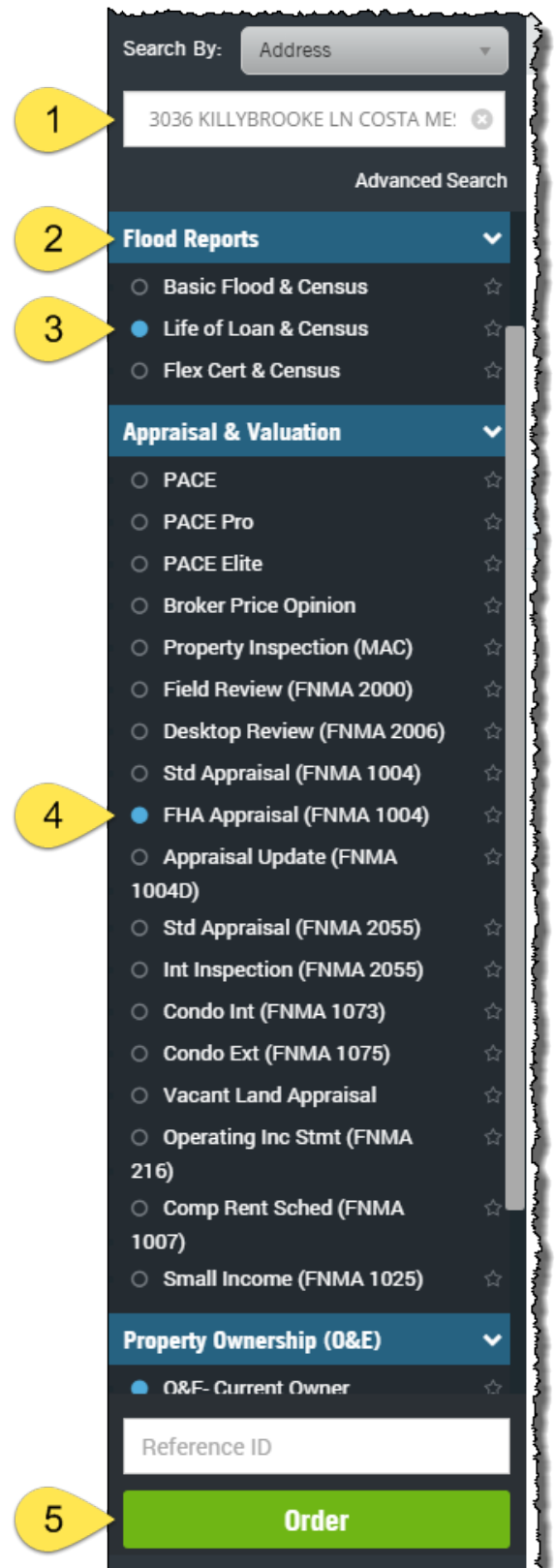
## Ordering Reports

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

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

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

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



## Order Portal

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

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

ORDER PORTAL

**6** **NEW ORDER**  
PLACE A SINGLE PROPERTY ORDER

**NEW BATCH ORDER**  
PLACE A MULTI-PROPERTY ORDER

**VIEW ALL ORDERS**  
VIEW ALL RECENT ORDER ACTIVITY

Select **7** Enter Property

**8** **FLOOD REPORTS**

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

**8** **PROPERTY OWNERSHIP (O&E)**

- O&E- Current Owner
- O&E- Two Owner
- Enhanced O&E

3036 KILLYBROOKE LN COSTA MESA CA 92626 AND/OR Orange 141-163-05

Owner/Borrower First Name Owner/Borrower Last Name OR BANK LASALLE NATION...

1 Owner/Borrower Phone **9**

PLACE ORDER

Clear all and start over

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

1 9255551212

PLACE ORDER

## Order Status

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

<b>NEW ORDER</b> PLACE A SINGLE PROPERTY ORDER	<b>NEW BATCH ORDER</b> PLACE A MULTI-PROPERTY ORDER	<b>VIEW ALL ORDERS</b> VIEW ALL RECENT ORDER ACTIVITY
✓ <b>SUCCESS!</b> Your order was successfully placed. Orders will be delivered individually in the <a href="#">View All Orders</a> tab. <span style="float: right;">✕</span>		

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## Checking on Orders

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

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

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

Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address	City	State	Cycle	+ Details
Completed	11/04/2016	1	911917	11/04/2016	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	+
Completed	11/04/2016	1	911914	11/04/2016	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	+
Processing	11/04/2016	1	911916	11/04/2016	Pace		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	+
Processing	11/04/2016	1	911915	11/04/2016	Std Appraisal FNMA 1004		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	+
Completed	11/04/2016	TEST - DEL...	911913	11/04/2016	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	+
Completed	11/03/2016	TVR Report	2220	11/03/2016	Totalview Report					0.25 h	+
Completed	11/03/2016	All Subord ...	2219	11/03/2016	All Subordinations					0.25 h	+
Completed	11/03/2016	All Assignm...	2218	11/03/2016	All Assignments					0.25 h	+
Completed	11/03/2016	Latest Assi...	2217	11/03/2016	Latest Assignment					0.25 h	+
Completed	11/03/2016	File for Up...	2216	11/03/2016						0.25 h	+

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

This close-up shows a job record expanded from the table. It displays a list of status changes with timestamps and descriptions. Red arrows point to the right, indicating the expansion of the record.

Status	Status Date	Ref # / Batch Name	+ Details
Completed	11/04/2016	1	+
	11/04/2016 10:12 AM	Submitted	
	11/04/2016 10:12 AM	Processing Request Submitted	
	11/04/2016 10:13 AM	Completed	
Completed	11/04/2016	1	+
	11/04/2016 10:11 AM	Submitted	
	11/04/2016 10:11 AM	Processing Request Submitted	
	11/04/2016 10:11 AM	Completed	

This close-up shows the table header and the plus signs used to expand records.

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

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

## Downloading Completed Jobs

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

The screenshot shows the DataTree interface with a table of jobs. The table has columns for Product, APN, Address, City, State, and Cycle. The first two rows are highlighted in grey. A yellow callout '1' points to the 'Completed' status and download icon in the first row. A yellow callout '2' points to the 'Download' link at the bottom left of the table. Below the table, there are two 'Save As' dialog boxes. The first dialog box shows the file name '1442878.pdf' and the save type 'Adobe Acrobat Document'. The second dialog box shows the file name '1442881.pdf' and the save type 'Adobe Acrobat Document'. The background shows a summary of 16 orders, with 13 completed and 0 errors.

Status	Status Date	Product	APN	Address	City	State	Cycle	+ Details
<input checked="" type="checkbox"/>	Completed	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
<input checked="" type="checkbox"/>	Completed	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
<input type="checkbox"/>	Processing	Pace		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
<input type="checkbox"/>	Processing	Std Appraisal FNMA 1004		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
<input type="checkbox"/>	Completed	Basic Flood & Census		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	
<input type="checkbox"/>	Completed	Latest Assignment					0.25 h	
<input type="checkbox"/>	Completed	Open Lien Report					0.25 h	

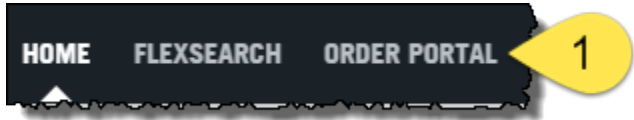
DataTree will prompt you for the location to save the file. If you selected multiple jobs to download, there will be multiple Save As dialog boxes.

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



# Workflow Options

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



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

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

For additional information on the Batch Order Service, please see the document “DataTree Batch Ordering” on the DataTree Support Site. (<http://www.datatree.com/academy>).