

Originator and Processor Users Frequently Asked Questions

Use this document to get more information on how the user assignment feature works for Rotation Managers, Originators and Processors in Appraisal Firewall.

Q: What is a “Processor” in Appraisal Firewall?

A: In AppraisalFirewall, a “Processor” is a type of user who works the front end of a request along side an “Originator” type of user. Processors can originate requests on behalf of originators, but are not Originator users. Each request will have one Originator and, optionally, one Processor. Both Originators and Processors are Managed Users under a Rotation Manager.

Q: Why is a Processor helpful to Lenders using AppraisalFirewall?

A: In some Lender offices, processors (Loan Processors, back office people) will work on loans after they are initiated by Originators (Loan Officers, sales people). In such instances, the Originator and Processor users work as a team on loan products. Sometimes, an Originator is only involved in initiating a request with a vendor and the Processor will take over from that point forward. In other cases, both the Originator and the Processor are equally involved in seeing an appraisal through to its completion.

Q: How is a user designated as a “Processor”?

A: When a Rotation Manager clicks the **My Users** button and opens their user list, they can add a new user. When they are adding a new user, they can select whether the user they are adding is an Originator or a Processor from the options below the User Name field. Once a Processor is added to the user list, all of the Originators already setup can add the Processor to an order.

Q: What kind of things can Processors do?

A: A Processor has equal rights to an Originator on any request they are assigned to. They both can place new appraisal orders, will see the same messages, get the same notifications, and be able to communicate to the same parties.

Q: Can a Processor communicate with the Appraiser?

A: If the Originator on a request is set up to initiate communications with the Appraiser in a managed fashion via the Rotation Manager, then yes. A Processor is limited to the same communication abilities as the Originator – per the Rotation Manager’s approved processes.

Q: Can a Processor initiate the appraisal order in AppraisalFirewall?

A: Yes. A Processor can initiate the appraisal process just like an Originator can – per the lender’s approved process. This order will be assigned to the Rotation Manager as the Originator by default. Once the order has been placed, the Processor can assign the order to another Originator that the Processor specifically chooses.

Q: Who can change the Originator or Processor assignments on an order?

A: Processors, Originators, and Rotation Managers can all change assignments. Any change in assignments will be logged on the **Communications** tab.

- ◆ If there is a Processor on an order, either the Rotation Manager or the Originator can assign a different Processor to an order.
- ◆ Either the Processor or the Rotation Manager can assign a different Originator to an order.
- ◆ At any time during the appraisal process, the Rotation Manager can change the Originator or the Processor.

Q: How does Appraisal Firewall handle assignment changes?

A: The prior user will no longer have access to the order. For example, if a Processor reassigns an order to a different Originator, the prior Originator will no longer have access to the order. This works the same way with changing the Processor on an order. The exception here is when the Rotation Manager is the Originator (this happens on orders placed by Processors) – because Rotation Managers can always see all orders by users beneath them.

Q: How is a Processor assigned to a request?

A: There are three ways to assign a Processor to a request:

1. The Processor can create a new request on behalf of an Originator. The Processor will be automatically assigned to this new request.
2. The Originator assigned to a request can view/modify the Processor assigned to the request by clicking the Processor button on an open order.
3. The Rotation Manager over a request can view/modify both the Originator and the Processor users aligned to a request by opening an order, clicking on the **Parties** button, then viewing the Originator and Processor tabs and using the **Change** button.

Contact your Appraisal Firewall representative with any questions at (800)452-1174 or AppraisalFirewall@SharperLending.com