Lender Rotation Management

How to Setup a Controlled Rotation

As an Administrator, do you have appraisers that say they cover a certain area, but you don't necessarily want them to? With Appraisal Firewall, you can override an appraiser's service area with your own service area preferences and qualifications. Appraisal Firewall retains information on those appraisers that you have setup like this, but keeps other appraiser profiles that you haven't modified intact. You can pick and choose your appraisers' service areas to make sure the appraiser with the right expertise gets the orders you want.

Accessing My Rotation from Relationships Screen

You can enable **My Rotation** from your **Relationships** screen. Within your Administrator account, select **Relationships** along the left hand side. Navigate to the **My Appraisers** tab (Please note: If your company operates with multiple divisions, you can access the My Appraisers screen under the My Divisions tab and expanding the Appraisers toolbox associated with any division). By default, Appraisal Firewall displays your company's active appraiser panel. On the list of appraisers below the map, click the lock icon to access the **My Rotation** screen and modify a specific appraiser's area of coverage.

Green lock icons within an appraiser list indicate that you have already set a controlled rotation for the particular appraiser. Grey lock icons indicate that a controlled rotation is not in place and orders will be routed to the appraiser based on the coverage information entered in their profile.

Click the lock icon to view and modify an appraiser's controlled rotation.

When you open the **My Rotation** screen, the specifications window opens for the associated appraiser. When you override and define an appraiser's service areas, it is recommended that you define both Qualifications and Service Areas for proper routing.

Check any **Qualifications** checkboxes to have this appraiser receive these types of appraisal orders.

Click **Add** to enter service area preferences for this appraiser.

Allen Widmer   [Add] [Done]

When controlling the routing qualifications and service areas of an appraiser, both Qualifications and Service Areas sections must be specifically defined for proper routing

Qualifications
- ☑ FHA
- ☐ Waterfront
- ☐ Acreage
- ☐ Construction
- ☐ Condo
- ☑ Certified
- ☐ USDA
- ☑ Manufactured
- ☐ Rural
- ☑ Non-Owner Occupied
- ☑ 2-4 Unit
- ☐ Jumbo

Service Areas

State	County	Zip	
WA	Chelan		Remove
WA	Spokane		Remove
WA	Stevens		Remove

Your preferred Service Areas will display here. *Note – leave the Zip Code blank to have the appraiser cover the entire county.*

Click **Remove** to delete any service areas that you have entered for this appraiser.

To enter a coverage area that you would prefer this appraiser work in, click the **Add** button.
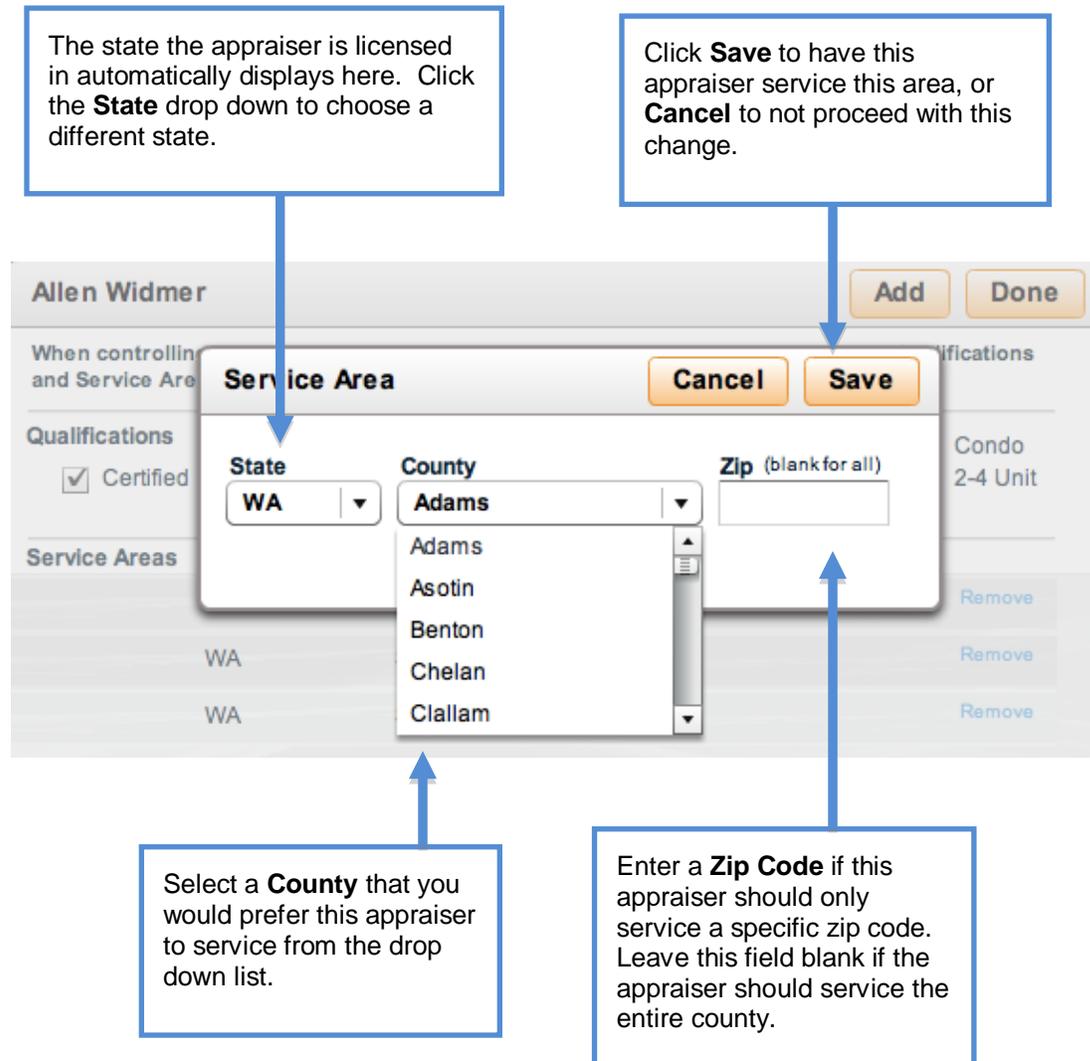
The state the appraiser is licensed in automatically displays here. Click the **State** drop down to choose a different state.

Click **Save** to have this appraiser service this area, or **Cancel** to not proceed with this change.

Select a **County** that you would prefer this appraiser to service from the drop down list.

Enter a **Zip Code** if this appraiser should only service a specific zip code. Leave this field blank if the appraiser should service the entire county.

- You can add as many counties and zip code coverage areas as you like.
- If you have an appraiser that services multiple zip codes, enter each one of the zip codes individually.
- Leave the Zip Code field blank for the appraiser to service the entire county.
- If you have marked checkboxes in the Qualifications section, you must also enter coverage areas in the Service Areas section for the qualifications to take effect.

Appraisal Firewall lets you choose if you want to override service areas for all of the appraisers in your panel, or only certain appraisers. You have the option to have a 'mixed' panel: a panel where you have specified service areas for certain appraisers, but kept the appraiser-entered service areas for others. How you prefer to set this up is up to you.