

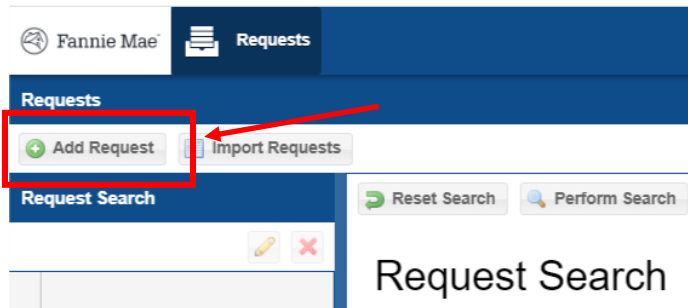
## Value Management System User Guide

Follow the steps below to perform basic tasks in the Valuation Management System (VMS).

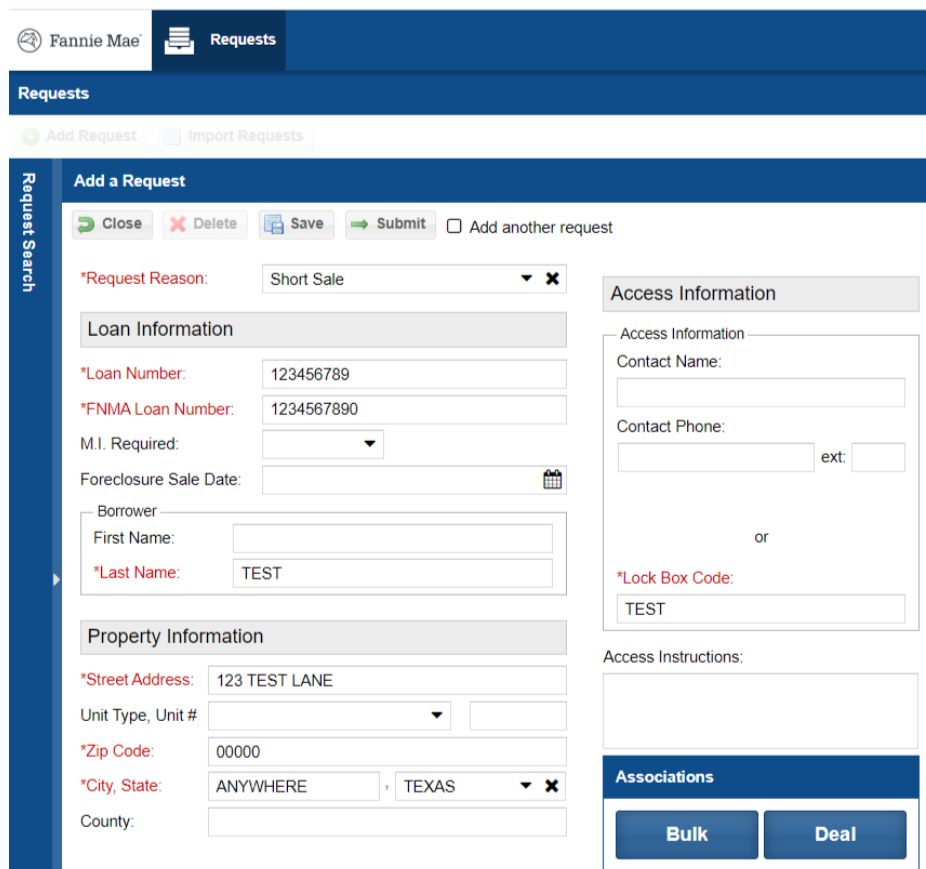
### Valuation Request Input

#### Single Request

“Add Request” will allow you to input a single request.



Simply fill out the required fields on the form and you can Submit the request to Fannie Mae. Depending on the reason for your request, there will be different information **\*Required**.



The screenshot shows the 'Add a Request' form. At the top, there are buttons for 'Close', 'Delete', 'Save', and 'Submit', along with a checkbox for 'Add another request'. The form is divided into several sections:

- \*Request Reason:** A dropdown menu with 'Short Sale' selected.
- Loan Information:**
  - \*Loan Number: 123456789
  - \*FNMA Loan Number: 1234567890
  - M.I. Required: A dropdown menu.
  - Foreclosure Sale Date: A date picker.
  - Borrower:**
    - First Name: A text input field.
    - \*Last Name: TEST
- Property Information:**
  - \*Street Address: 123 TEST LANE
  - Unit Type, Unit #: A dropdown menu.
  - \*Zip Code: 00000
  - \*City, State: ANYWHERE, TEXAS
  - County: A text input field.
- Access Information:**
  - Access Information: A section header.
  - Contact Name: A text input field.
  - Contact Phone: A text input field with an 'ext:' field.
  - or
  - \*Lock Box Code: TEST
- Access Instructions:** A large text input area.
- Associations:** A section header with two buttons: 'Bulk' and 'Deal'.

#### Request Import

When you have a spreadsheet of requests that you would like to import, choose “Import Requests” in the toolbar.



### VMS Order Form Example:

FNMA Loan Number	Borrower First Name	Borrower Last Name	Property Address	Unit #	Property City	Property State	Property Zip	Order Reason Code	Property Access Contact	Access Phone
1234567890		SMITH	123 MAIN ST		DALLAS	TX	75236	Short Sale		
2345678901		NA	124 MAIN ST		CHICAGO	IL	75236	Mortgage Release		
3456789912		THOMAS	125 MAIN ST		LOS ANGELES	CA	75236	Reserve Price Bid Instructions		

Fannie Mae Requests

Requests

Add Request Import Requests

Request Search Reset Search Perform Search

Request Search

Browse to find the file that you would like to import. Select “Automatically submit successfully imported Requests” otherwise all imported requests will be created as a draft. Click Continue.

Fannie Mae Requests

Requests

Add Request Import Requests

Request Search

Import Requests

Cancel Continue

Associations

Bulk Deal

Import Options

Select mapping configuration:

Automatically submit successfully imported Requests

File Options

File has headers

Upload Files

Select a file to upload (CSV, XLS, XLSX):

Browse...

Overrides

Request Reason:



Next, you will need to map each column from your spreadsheet to the appropriate field in VMS. Click any of the column headers in the “Map To” row to change it. Make sure to scroll to the right and review all columns.

**Choose Field Mappings**

Cancel Finish 8 records

Map from:	Servicer L...	FNMA Loan Nu	Borrower ...	Borrower ...	Property ...	Unit #	Pro
Map to:	Loan Num...	n Number	Borrower F...	Borrower L...	Address	Unit	City
	00007	[No Mapping]		VAN	129 MAIN ST		PAR
	00006	Access Contact		JONES	128 MAIN ST		CHE
	00005	Access Lockbox		PARIS	127 MAIN ST		AUS
	00004	Access Phone		WOOTEN	126 MAIN ST		BOS
	00003	Access Phone Ext		THOMAS	125 MAIN ST		LOS
	00002	Address		NA	124 MAIN ST		CHIC
	00001	Borrower First Name		SMITH	123 MAIN ST		DALI

Mapping Options

Do not save this map

Save as a new mapping

Name:

\*\*Hint: If your spreadsheet always has the same columns and column headers you can save the mapping the first time and skip this step next time you need to import.

Select “Finish” when you are finished and you will be taken to a confirmation screen of your import.

Select View Batch Status to view the status of cases imported

Your Request Import is being processed.

You may leave this screen by clicking one of the buttons below

**Import New Requests**  
Begin import process to add more requests.

**Perform a Requests Search**  
Enter search criteria to find requests.

**View Batch Status**  
Check batch processing results and details.

Batch status will show cases correctly imported, as well as those that have issues. Those with issues will need to be addressed before they are able to be placed.



[Add Request](#) [Import Requests](#)

### Batch Reports

atches Since: 02/07/2020

atch Type: Request Import

Create Date/Time - User

#### In Progress

Fri Feb 07 @ 11:24:30 AM - Hall, Kr...

#### Error

Fri Feb 07 @ 11:19:06 AM - Hall, Kr...

### Batch Details

[Dismiss Notification](#) [Request IDs](#) [List Requests](#)

#### Batch Information

Batch ID: 10554  
 Batch Type: Request Import  
 Completed Date:  
 Create Date: Fri Feb 07 @ 11:24:30 AM  
 Created By: Hall, Kristen OBO Amoko, Stephen  
 File Name: Dummy 2-7.xls  
 Submitted / Total Records: -  
 Start Date: Fri Feb 07 @ 11:24:30 AM  
 Status: In Progress

25%

[Click to check progress](#)

Batch Details					
Batch Information					
Batch ID:	10554				
Batch Type:	Request Import				
Completed Date:	Fri Feb 07 @ 11:24:42 AM				
Create Date:	Fri Feb 07 @ 11:24:30 AM				
Created By:	Hall, Kristen OBO Amoko, Stephen				
File Name:	Dummy 2-7.xls				
Submitted / Total Records:	2 / 4				
Start Date:	Fri Feb 07 @ 11:24:30 AM				
Status:	Error				
Upload ID:	20075				
Row	Address	Loan Number	FNMA Loan Number	Sta...	Message
2	1254 FRIEND ST, CADILLAC, MI, 49601	125865	1234567894	✓	
3	5568 WESTERN CITY RD, KALAMAZOO, MI, 49009	345568	1234567895	⚠	In Draft Status
4	42563 SPECIAL ST, KLAMATH FALLS, OR, 97603	654822	1234567896	⚠	In Draft Status
5	35687 WAYBACK WAY, PELICAN RAPIDS, MN, 56572	125493	1234567894	✓	

You can right click on the screen to export the list of orders or you can search in Draft status for the ones that need corrections before proceeding to place the order.

## VMS Search Options

You may search for requests in a variety of ways.

“Current Status” allows you to search by the status of your request:

- Draft – Request has been entered but not submitted to Fannie Mae, or all required fields were not provided
- Submitted – Request has been submitted to Fannie Mae and is currently under review
- In Progress – The valuation(s) associated with this request are in progress
- In Review - The valuation(s) associated with this request are completed and is pending review
- Complete – The valuations associated with this request have been completed and your value will be available shortly
- Rejected – Fannie Mae determined that this request was not needed
- Cancelled – Fannie Mae has cancelled the request



Activity will allow you to search for requests by relative dates or a date range for Created, Last Modified, Notes Added, Expected Delivery and Dispute Resolved.

You can also select multiple Statuses, Reason Codes, and States from the drop-down search parameters on the search screen. This should allow you to pull more comprehensive searches and reporting. Don't forget that you can save your favorite/useful searches.

[Reset Search](#) [Perform Search](#)

## Request Search

**Request Information**

Customer:

Request ID(s):

Current Status(es): Draft Submitted In Progress Complete Rejected Cancelled In Review

Reason(s): Mortgage Release Reserve Price Bid Instructions Short Sale

Loan Number:

FNMA Loan Number:

**Request Activity**

Activity: Last Modified

Previous Status(es):

Time Frame  Date Range

From:

Until:

Request Action Required: Today

Action Required By:

Resolved

Requires Attention

**Unread Request Notes**

Created By:

Type:

Unsaved Search [Save As New](#) [New Search](#) [Modify Search](#)

Request Information: Current Status(es): Draft, 6 more... Reason(s): Mortgage Release, 2 more...

Request Activity: Activity: Created TimeFrame: Last Month

**Save Search**

Save this search as:

Share this search with my company:

[Save](#) [Cancel](#)

### Searching for Unread Notes

Searching under Unread Request Notes for "Action Required" will help you locate the requests where Fannie Mae needs a response. Select "Customer" in the "Action Required By" field and select "Requires Action" to see the list of requests that have action required notes.



Reset Search Perform Search

# Request Search

Request Information

Customer:

Request ID(s):

Current Status(es):

Reason(s):

Loan Number:

FNMA Loan Number:

Address:

Zip Code:

City:

State(s):

County:

Request Activity

Activity:

Previous Status(es):

Time Frame

Date Range

From:

Until:

Request Action Required

Action Required By:

Resolved

Requires Attention

Unread Request Notes

Created By:

Type:

Request PDF to Custodian

Fulfilled

Unsaved Search Save As New New Search Modify Search

Unread Request ...  
Created By: Customer  
Type: All

Group By: No Grouping Sort By: No Sorting Delete

Status	Request & Loan IDs	Property Address	Reason	Order Timeline
<input checked="" type="checkbox"/> In Progress	1909017462 FNMA Loan #1672499647 Loan #1672499647	14779 EAGLES CROSSING DR ORLANDO, FL 32837	Short Sale	JAN 29 2020 - FEB 10 2020
<input type="checkbox"/> In Review	1909017461 FNMA Loan #1672385174 Loan #1672385174	300 INDEPENDENCE DR HAMBURG, PA 19526	Reserve Price ...	JAN 29 2020 - FEB 6 2020
<input type="checkbox"/> In Progress	1909013688 FNMA Loan #6565322314 Loan #444554465	1216 TEST STREET LEANDER, TX 78641 TRAVIS County	MI Termination...	DEC 16 2019 - DEC 19 2019
<input type="checkbox"/> Complete	1909013400 FNMA Loan #1700137767 Loan #1700137767	6338 BRIANNA CIR CORPUS CHRISTI, TX 78414	Short Sale	DEC 6 2019 - DEC 9 2019

Double click on the request you would like to view.

Go to the notes tab for each request to read the note and respond to Fannie Mae by clicking on the mailbox icon and adding your note.

Request 1909017462

Close Details Notes Attachments History

Notes

Export Refresh Sort by: Create Date

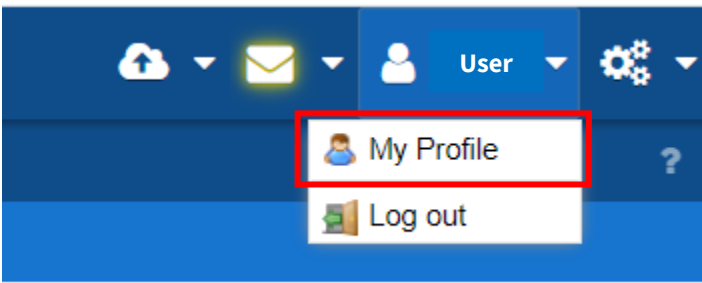
PUBLIC USE - Test Note to Request

01/30/2020 AT 11:08 AM



## VMS Notifications Subscription

VMS allows you to set up notifications on items for which you want to be informed. Within “My Profile” you can set up “Subscriptions” to receive these notifications.






You can be notified of any request that you created or were created for you by Fannie Mae. These notifications include when the request is created, updated, submitted, completed, a note is added, an attachment is added, or the status is changed.

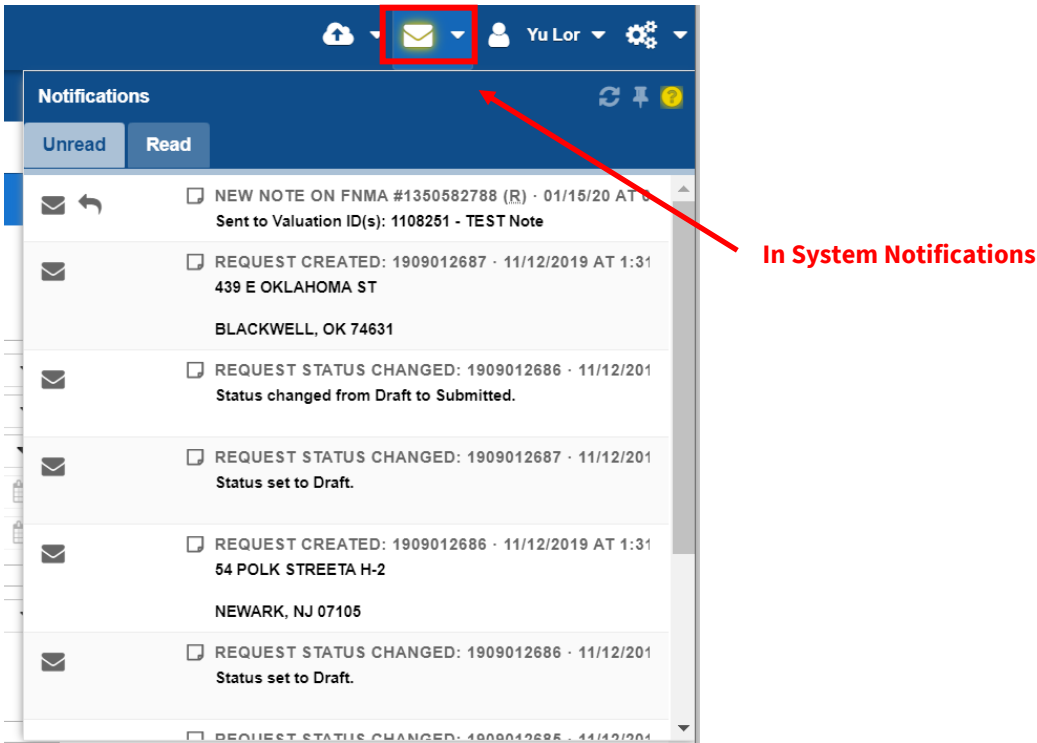
**My Profile**

Contact Information Subscriptions Change Password Refresh


Requests


**When I am the Creator...**

Subscription Method	 In-system Notification	 1442@example.com	 test.stage1@stage.com
Request Attachment Added	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Created	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File Request Completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File Request Created	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Import Saved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
except if created by me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Resolved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Note Created	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
except if Public or Internal Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
except if created by me	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
except if action note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Status Changed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Submitted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Details Changed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Valuation Failed Creation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



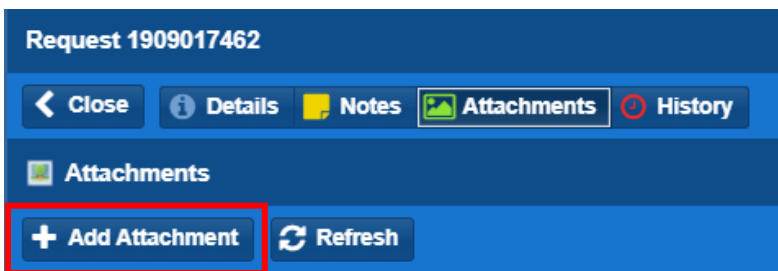
You can also choose to have your notifications sent to your email address or have them sent to the In-System Notifications (or both). View your In-System Notifications by clicking the Notifications button at the top of your screen.

To clear the system notification in the Notification Module you can click on 

To reply to the system notification in the Notification Module you can click on 

## Adding Attachments

Users can add attachments to the request by clicking on the Attachments tab.



Click on Add Attachment and browse for the file you would like to add.





Attach File

Select the file that you would like to attach:

Browse...

Select the description of the attachment:

↓

- Affidavit CA
- AI Ready File
- Ancillary Doc
- Appraisal File
- Appraisal Form
- APR
- BPO
- BPOForm Cover Page
- Contract
- Damage Photo 1
- Damage Photo 10
- Damage Photo 2
- Damage Photo 3

From the drop-down under the description, you can select the type of file you are adding and select Attach.

Attach File

Select the file that you would like to attach:

C:\fakepath\4009597519.PDF Browse...

Select the description of the attachment:

Other

\*The purpose type of "Other" requires a custom description:

Legal Description

Attach Cancel

Once the attachment has been added, please also add a new note to notify Fannie Mae of the document.

## Value Retrieval

When the valuation request is in Complete status you can pull the approved Fannie Mae value from the Loss Mitigation Valuation application. Follow the link under the VMS request status.



**Request 1800094192**

Close | Details | Notes | Attachments | Request History

**Request:** 1800094192  
**Reason:** Short Sale  
**Submitted:** 07/25/2014  
**Assigned To:** Daisha Board

**Status:** Complete as of 07/29/2014 [Request the PDF](#)

**Expected Delivery:**  
 Your value request is currently under Internal Review by Fannie Mae. Expected delivery is within 3 business days. Once your value has been approved, you may retrieve it [here](#).

**Loan Information**

**Loan Number:** 1757341029  
**FNMA Loan Number:** 1713312028  
**Borrower First Name:** Not specified  
**Borrower Last Name:** Arapi

**Property Information**

**Address:** 15 WILLOW AVE  
**Unit:** Not specified

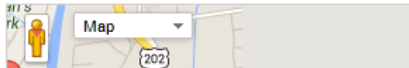
**Valuations**

**BPO: 105643** Status: Closed as of 07/28/2014  
**APR: 105642** Status: Cancelled as of 07/29/2014

**Dismissals**

No dismissed issues to display.

**Map**



For detail search criteria's for LMV please refer to the [LMV User Guide](#).

### How to request for a valuation PDF

1. In the Request window input Fannie Mae Loan Number
2. Click on "Perform Search" button

Reset Search | Perform Search

### Request Search

**Request Information**

Customer: [dropdown] x  
 Request ID(s): [text]  
 Current Status(es): [dropdown] x  
 Assigned To: [dropdown]  
 Reason(s): [dropdown] x  
 Loan Number: [text]  
 FNMA Loan Number: [text]  
 Address: [text]  
 Zip Code: [text]  
 City: [text]  
 State(s): [dropdown]  
 County: [text]

**Request Activity**

Activity: [dropdown]  
 Previous Status(es): [dropdown]  
 Time Frame [dropdown]  
 Date Range From: [calendar] Until: [calendar]

**Request Action Required**

Action Required By: [dropdown] x

Resolved  
 Requires Attention  
 Read  
 Unread

**Request PDF to Customer**

Fulfilled  
 Unfulfilled

3. Once the search is performed, you will be routed to the Detail screen for that loan number. In the top right-hand corner of the Detail screen, click on the "Request the PDF" button.



**Request 1800094192**

Close | Details | Notes | Attachments | Request History

<b>Request:</b> 1800094192	<b>Status:</b> Complete as of 07/29/2014 <a href="#">Request the PDF</a>
<b>Reason:</b> Short Sale	<b>Expected Delivery:</b>
<b>Submitted:</b> 07/25/2014	Your value request is currently under Internal Review by Fannie Mae. Expected delivery is within 3 business days. Once your value has been approved, you may retrieve it <a href="#">here</a> .
<b>Assigned To:</b> Daisha Board	

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**Loan Information**

<b>Loan Number:</b>	1757341029
<b>FNMA Loan Number:</b>	1713312028
<b>Borrower First Name:</b>	Not specified
<b>Borrower Last Name:</b>	Arapi

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**Property Information**

<b>Address:</b>	15 WILLOW AVE
<b>Unit:</b>	Not specified

---

**Map**

\*\*\*This will send a notification to FNMA to fulfill the PDF request. Please allow 24-48 hours before you will see the PDF in the Attachment screen\*\*\*

- Once the request is fulfilled you can retrieve the PDF in the Attachment screen.