

How to Order an Appraisal in MFSTPO

A step-by-step training guide for loan officers and brokers ordering conventional, FHA, and USDA appraisals through the Mortgage Financials TPO system. Follow this process for all new appraisals ordered on and after October 19th.

[LOAN OFFICERS & BROKERS](#)

[CONVENTIONAL · FHA · USDA](#)



Before You Begin: Eligibility Checklist

Not every loan type follows the same pre-ordering rules. Confirm the following before placing your appraisal order to avoid delays or compliance issues.

All Loans

You must have **Intent to Proceed** on file before collecting any payment from the consumer. Do not initiate the appraisal order until this is confirmed.

FHA Loans

A **case number must be issued** before you can order the appraisal. Ordering without a case number will result in processing errors.

VA Loans

VA appraisals are **not ordered through this workflow**. VA appraisal ordering continues through **Webology**. This TPO process does not apply.

 The **broker partner is responsible for payment**. Payment may be collected at closing or paid upfront by the broker office.

The screenshot displays the 'Additional Information' screen in the MFSTPO Connect application. The top navigation bar includes links for Home Page, Quick Pricer, Add New Loan, Pipeline, Esign, Resource Center, and Appraisal Request. The left-hand navigation panel lists various options, with 'Order Appraisal' highlighted. The main content area contains several input fields and dropdown menus for loan information.

Ken Customer
 10655 Birch St, Frisco, TX, 75033
 03 TPO Test KDH

Loan #: **9826028116**
 Total Loan Amt: **\$300,000.00**
 Loan Type: **Conventional**
 Loan Purpose: **Purchase**
 Interest Rate: **4.250%**
 LTV/Comb Lo...: **88.24% / 88.24%**
 Started: **Wh 1st**

Additional Information

Select Borrower Pair
 Ken N Customer

Agency Case No
 Lender Case No: **9826028116**
 Alternate Loan Number
 Collateral Tracking Number

Universal Loan ID
5493009F6BJDCZM27Y26982602811669

Application Date: **10 / 16 / 2026**
 Estimated Closing Date: **11 / 25 / 2026**
 Loan Documentation Type: **(F) Full Documentation**
 Closing Type: **Hybrid**

Freddie Mac Offering Identifier: **Select an Option**
 Freddie Mac Income Based Deed Restrictions: **Select an Option**
 Freddie Mac Community Land Trust Indicator: **Select an Option**
☐ HomeOne

Freddie Mac CHOICE Offering Type
☐ CHOICERenovation
☐ CHOICERenoExpress
☐ CHOICERenovationMortgageWithRecourse
☐ CHOICERenoExpressDTSArea
☐ CHOICEHome
☐ GreenCHOICE
☐ GreenCHOICEToPayOffOutstandingEnergyDebt

Step 1: Open the Appraisal Order Screen

Log into the loan file in Mortgage Financials TPO. On the **left-hand navigation panel**, locate and click **Order Appraisal**. The system will automatically sync all relevant loan data into the appraisal order screen — no manual re-entry required.

⚠ Starting **Monday the 19th**, two previously available ordering links will no longer be active. This is the new required process for all appraisal orders going forward.

What Syncs Automatically

- Borrower and property information
- Loan purpose and transaction type
- Loan amount and product details
- Key dates and documentation type

Step 2: Review & Add Contact Information

Once the order screen loads, review all contact information pulled from the loan file. The appraiser will need a contact to schedule property access — make sure this person is reachable.

If no suitable contact exists, click **Create New Contact** to add one manually.

Who to Add as a Contact

- Realtor or listing agent
- Seller contact
- Buyer contact

Required Information

- At least one phone number (cell preferred)
- Full name and role

☐ For **refinances**, the default primary contact is typically the customer. You can remove or change the default by clicking the **X** next to the contact name.

MORTGAGE FINANCIAL SERVICES WHOLESALE

Home Page Quick Pricer Add New Loan Pipeline Esign Resource Center FHA/USDA Appraisal Request Conventional Appraisal Request

Ken Customer
10655 Birch St, Frisco, TX, 75033
03 TPO Test KDH

Loan #: 9826028116
Total Loan Amt: \$300,000.00
Loan Type: Conventional
Loan Purpose: Purchase
Interest Rate: 4.250%
LTV/Comb Lo... 88.24% / 88.24%

Started Wh 1st

Order Appraisal
_Testing_Do not use

Loan Summary
URLA / Request CD
Additional Information
Lender Loan Information
Borrower Information
Employment and Income
Assets and Liabilities
Real Estate
Loan and Property Informa...
Information for Governmen...
Request CD

Credit Reissue & AUS
Upload Documents
Submit Loan to Set Up/
Click Confirm
Re-Submit Loan / Click
Confirm

Borrower
H: 818-222-2222
C: 818-444-1234
ken.c@fanniemae.com

Account Executive

Wholesale Broker
C: 469-767-5254
W: 469-767-5254
kellydhaney@yahoo.com

Wholesale Processor
kellydhaney@yahoo.com

Wholesale Company
W: 469-767-5254

Listing broker

Loan Details

Loan Details

Important Dates

Loan Purpose: purchase
Priority: Normal
Borrower Payment Option: Send Payment Link to Borrower Before Ordering
Loan Type: Conventional
Estimated Value: \$340000.00
Loan Creation Source: Encompass TPO Connect
Subject Property Type: PrimaryResidence
Subject Property Number Units: 1
Occupancy (P/S/I): PrimaryResidence
Intent to Proceed: False
NMLS Id: 444555
ULDD Attachment Type: Detached
Branch: 6062173520
Lender Disclosed Amount: 1000

P&S Commitment Date:
Date Created: 10/16/2026

Your loan has been updated.

61°F Windy 2:15 PM 10/16/2026

Step 3: Verify Order Details Before Submitting

Before clicking **Create Order**, take a moment to review all populated loan and appraisal data for accuracy. Errors caught here prevent downstream delays.

Transaction Type

Confirm the loan purpose is correct — e.g., **Purchase** or Refinance. This drives which appraisal products are available.

Priority Level

Orders default to **Normal Priority**. If a rush is needed, do not change it here — email the **appraisal desk** directly to request expedited handling.

MORTGAGE FINANCIAL SERVICES WHOLESALE

Home Page Quick Pricer Add New Loan Pipeline Esign Resource Center FHA/USDA Appraisal Request Conventional Appraisal Request

Ken Customer
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03 TPO Test KDH

Loan #: 9826028116
Total Loan Amt: \$300,000.00
Loan Type: Conventional
Loan Purpose: Purchase
Interest Rate: 4.250%
LTV/Comb Lo... 88.24% / 88.24%

Started Wh 1st

New Order 10655 Birch St, Frisco, TX 75033

Total Fee: \$0

Due Date: 10/23/2026

Job Allocation Mode: Automatic

Order Request Method: Individually

Priority: Normal

Product & Fees

Select a Product: Select... \$ 0

Borrower Payment Option:

☐ On Hold until Payment

☐ Broker Payment

Cancel Create

Loan Details

Loan Purpose: purchase

P&S Commitment Date:

61°F Windy 2:16 PM 10/16/2026

Step 4: Select the Appraisal Product

Choosing the Right Product

Use the product selector to choose the appropriate appraisal type. For the most common scenario, select:

- **Conventional** loan type
- **One Unit** property type
- **Traditional** appraisal format

This is the **full appraisal** product. The system will automatically populate the default fee once a product is selected. The system now supports UAD 3.6 Appraisal

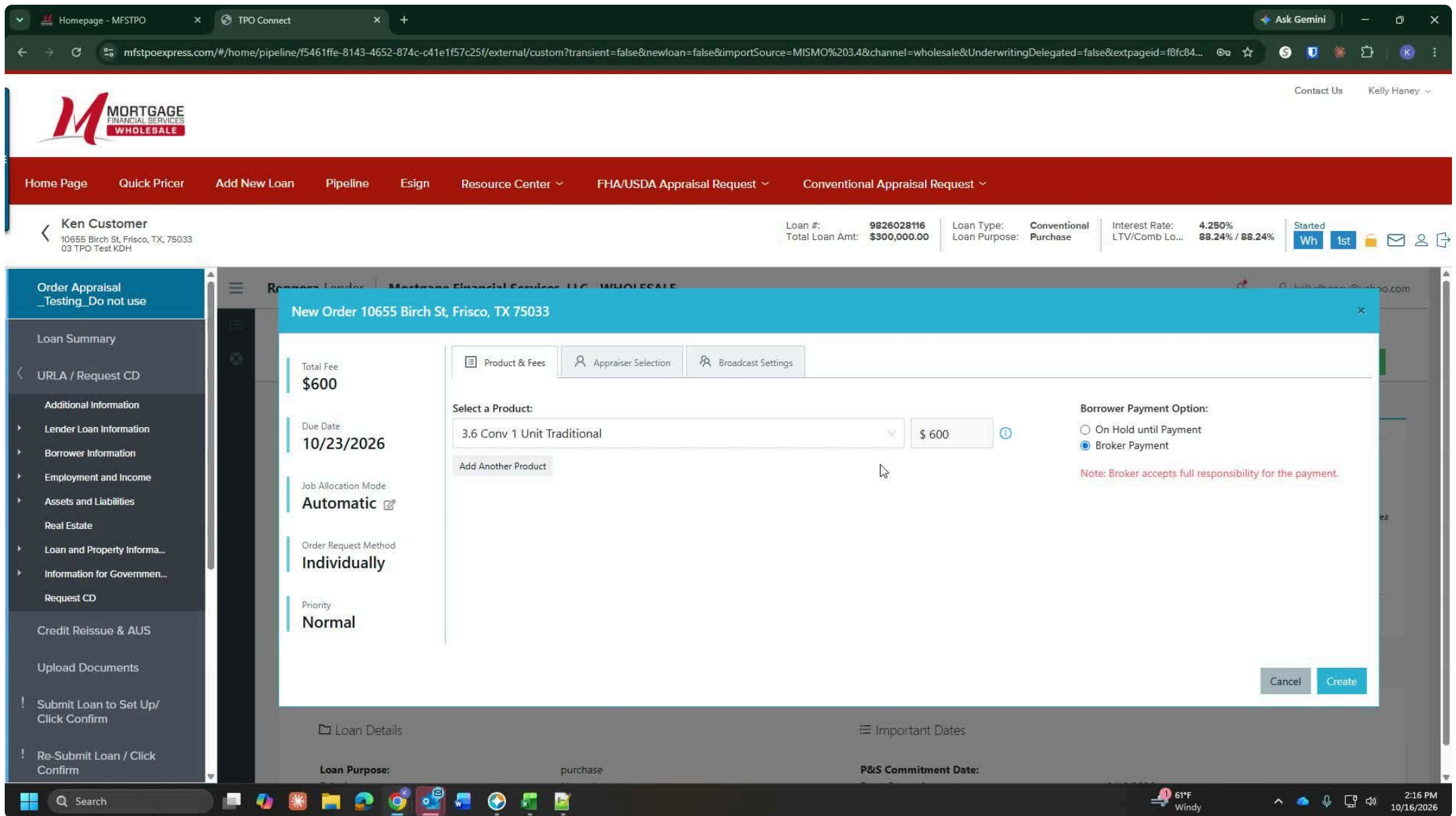
Payment Options

On Hold Until Payment

Order is held until the consumer completes payment via the link sent to their email address.

Broker Pays Upfront

Broker covers the fee on the client's behalf. Coordinate with our internal wholesale processing team for CD reimbursement.



Step 5: Submit the Appraisal Order

Once the product is selected and payment option is confirmed, click **Create** to submit the order. The system will validate the order before finalizing.

If any required information is missing or incomplete, the system will display a notification identifying what needs to be corrected before the order can go through.

✔ A successfully submitted order confirms the appraisal has entered the queue with the appraisal management company.

What Happens Next

01

Order Submitted

Your order enters the appraisal management queue.

02

Appraiser Assigned

An appraiser is matched and the contact is notified to schedule access.

03

Inspection Scheduled

The appraiser coordinates directly with the property contact.

The screenshot displays the TPO Connect web application interface. At the top, the browser address bar shows the URL: `mfstpoexpress.com/#/home/pipeline/639dac44-9f4a-4b0b-be62-92d6767601be/external/custom?extpageid=f8fc846a-c279-4956-8fcb-40bdd94098ff`. The page header includes the "MORTGAGE FINANCIAL SERVICES WHOLESALE" logo and navigation links like "Home Page", "Quick Pricer", "Add New Loan", "Pipeline", "Esign", "Resource Center", "FHA/USDA Appraisal Request", and "Conventional Appraisal Request".

Below the header, a sidebar on the left lists various actions: "Order Appraisal", "Loan Summary", "URLA / Request CD", "Credit Reissue & AUS", "Upload Documents", "Submit Loan to Set Up / Click Confirm", "Re-Submit Loan / Click Confirm", "View Underwriting Conditions", "Lock Loan", "Request Title Fees", "Request LE", and "Send Disclosures".

The main content area shows the details for a specific order: "#9826027793 3726 Poplar St., Baton Rouge, LA 70816 (East Baton Rouge County)". It includes a status message: "This order has been cancelled." and a note: "Your borrower has not downloaded the report sent to them after 72 hours." Below this, a table lists the contacts involved in the order:

Contact Name	Role	Phone (H)	Phone (C)	Phone (W)	Email
Alice Firstimer	Borrower	515-555-5555	515-679-0246		alice.f@fanniemae.com
Kelly Haney	Account Executive				
Kelly Haney	Wholesale Broker		469-767-5254	469-767-5254	kellydhaney@yahoo.com
Bugs Bunny	Wholesale Processor				kellydeanhaney@yahoo.com
03 TPO Test KDH	Wholesale Company			469-767-5254	

The interface also includes a "Delivery Status" button and a "Create New Contact" option. The bottom of the screen shows a Windows taskbar with the date and time: 2:18 PM, 10/16/2026.

When This Process Applies & Where to Get Help

Effective Date & Scope

This updated appraisal ordering workflow applies to **all new appraisals ordered on and after October 19th** with Mortgage Financial. This is the standard process for conventional, FHA, and USDA loan types ordered through the TPO platform.

VA appraisals remain outside this workflow and continue to be ordered through **Webology**.

Need Help?

Appraisal Desk

appraisaldesk@mfsus.com

Your primary point of contact for order questions, rush requests, and process support.

Quick Reference: Full Process at a Glance

Use this summary as a quick refresher before placing your next appraisal order in Mortgage Financials TPO.

