



Appraisal Coordination Checklist

Initial Request & Order Placement

Tasks related to receiving the appraisal request and submitting it to the appraisal vendor.

Loan Type

- ☐ Conventional
- ☐ FHA
- ☐ VA
- ☐ USDA
- ☐ Jumbo

Borrower Name

Write something...

Property Address

Write something...

Loan Amount

Enter a number...

Order Placement Date

Enter date...

Appraisal Vendor

☐ Vendor A

☐ Vendor B

☐ Vendor C

Order Number/Reference

Write something...

Special Instructions for Appraiser (e.g., access details, specific comps to consider)

Write something...

Appraiser Selection & Communication

Activities concerning choosing an appraiser and maintaining contact.

Appraiser Selection Method

☐ Approved Vendor List

☐ Market Search

☐ Referral

Appraiser Name

Write something...

Appraiser Phone Number

Write something...

Appraiser Email Address

Write something...

Initial Contact Date

Enter date...

Communication Log (Notes on interactions with appraiser)

Write something...

Appraiser Confirmation of Availability

- ☐ Confirmed
- ☐ Tentative
- ☐ Declined

Scheduled Walk-Through Time (if applicable)

Property Information & Access

Ensuring the appraiser has necessary details and access to the property.

Property Address (including unit # if applicable)

Write something...

Property Legal Description (if available)

Write something...

Number of Bedrooms

Enter a number...

Number of Bathrooms

Enter a number...

Specific property characteristics impacting value (e.g., view, upgrades, condition)

Write something...

Property Type

- ☐ Single Family Residence
- ☐ Condominium
- ☐ Townhouse
- ☐ Multi-Family
- ☐ Other

Date and Time of Key Availability (if applicable)

Enter date...

Contact Instructions for Property Access (e.g., lockbox code, gate code, contact person)

Write something...

Access Method

- ☐ Key Provided
- ☐ Lockbox
- ☐ Remote Access
- ☐ Other

Lockbox Location (if applicable)

 [Set My Current Location](#)



Appraisal Review & Follow-Up

Checking the appraisal status, addressing any issues, and following up with the appraiser.

Appraiser Estimated Completion Date

Enter date...

Appraisal Status

- ☐ Not Started
- ☐ In Progress
- ☐ Reviewing
- ☐ Completed
- ☐ Delayed

Notes on Appraisal Progress/Communication

Write something...

Date of Last Follow-Up

Enter date...

Number of Days Since Last Follow-Up

Enter a number...

Reason for Delay (If Applicable)

- ☐ Property Access Issues
- ☐ Data Inaccuracy
- ☐ Appraiser Availability
- ☐ Other

Details of Delay Reason (if 'Other' selected)

Write something...

Final Appraisal Delivery & Verification

Receiving the completed appraisal report and confirming its accuracy and completeness.

Appraisal Report Received Date

Enter date...

Appraisal Report File

 Upload File

Initial Appraisal Review Notes

Write something...

Appraised Value

Enter a number...

Value Reconciliation Required?

☐ Yes

☐ No

Value Reconciliation Explanation (if applicable)

Write something...

Compliance Review Completed?

☐ Yes

☐ No

Compliance Review Notes

Write something...

Appraisal Acceptance Status

- ☐ Accepted
- ☐ Rejected
- ☐ Requires Revision

Rejection/Revision Reason (if applicable)

Write something...

Compliance & Documentation

Ensuring appraisal process adheres to regulations and maintaining appropriate records.

Appraiser Licensing Verification Status

- ☐ Verified and Current
- ☐ Verified - Expiring Soon (within 90 days)
- ☐ Verification Required
- ☐ Not Applicable (exempt)

Appraiser License Expiration Date

Enter date...

Appraiser Independence Rule (AIR) Compliance

- ☐ Compliant
- ☐ Requires Review
- ☐ Not Applicable

Notes/Explanation of AIR Compliance (if 'Requires Review')

Write something...

Copy of Appraiser License (if verification not already on file)

 Upload File

Appraiser ID Number (for tracking/audit)

Enter a number...

Record of Communication Regarding Compliance (e.g., licensing issues)

Write something...

Review of Appraisal Ordering Disclosure

- ☐ Reviewed and Complete
- ☐ Requires Review