

Go here: <https://access.brookfieldrps.com>

## Brookfield RPS Access – Lender User Guide

---

Last Updated: April 7, 2015

Welcome to Brookfield RPS Access. For lenders, this is where you will go to order appraisal products. For those of you that have used LenderWorx in the past, you will notice improved usability, increased functionality and an overall enhanced experience.

This guide will walk you through all of the key features and functions of Brookfield RPS Access.

Logging In.....	3
Forgotten Password .....	3
Changing the Language Preference .....	4
Overview of Brookfield RPS Access .....	6
Placing an Order .....	8
Accessing the Order Form.....	8
Completing an Order .....	9
Ordering a Progress Inspection.....	16
Order Status Email Notifications .....	18
Setting Up Email Notifications - During the Order Process.....	18
Setting up Email Notifications - In Manage My Account Settings .....	18
Viewing Orders.....	19
Order Views .....	19
Order Details – Navigation .....	21
Navigating the Order Details .....	21
The Order Details Tabs .....	21
Cancelling an Order .....	23
Cancelling an Order – During Order Placement .....	23
Cancelling an Order – After Submission .....	23
Manage My Accounts.....	24
Accessing Manage My Account .....	24
Customize Your Order Views .....	25

Set-up Your Email Notifications.....26

Reset Your Password.....27

Search.....29

    Quick Search.....29

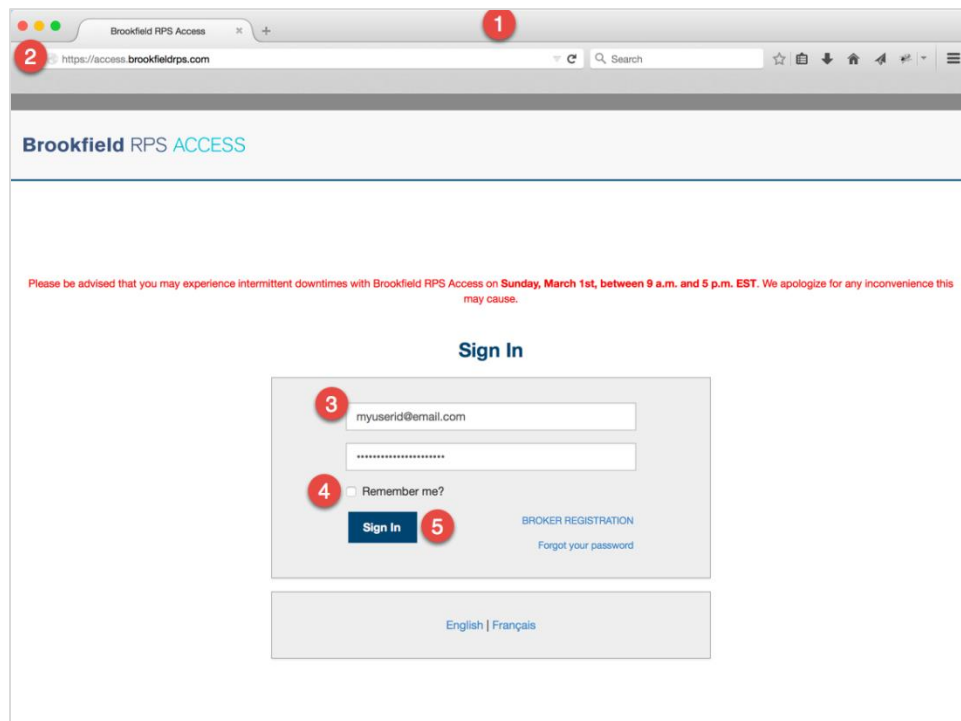
    Advanced Search.....29

Help.....31

    Troubleshooting and FAQs.....31

## Logging In

The following steps will assist you in getting logged in to Brookfield RPS Access:



1. Open your preferred browser (i.e. Internet Explorer, Google Chrome, Safari, and Mozilla Firefox).
2. Type the URL [access.brookfieldrps.com](https://access.brookfieldrps.com) into the address bar.
3. Once the site loads, type your user name and password into the two fields. (NOTE: Your username and password should be the same as the login credentials you currently use for LenderWorx).
4. If using a private computer and you wish to have the system retain your login credentials for your next visit, check the box next to “Remember me?”
5. Click the Sign In button.
6. You are now logged in. Please see the *Overview of Brookfield RPS* section below to familiarize yourself with the new system.

If you have forgotten your password, please see the *Forgotten Password* section.

**QUICK TIP:** If there are any scheduled outages anticipated for Brookfield RPS Access, these will be noted in red text above the Sign In box, as shown in the example.

## Forgotten Password

If you are trying to log in to Brookfield RPS Access, but do not remember your password, follow the instructions below:

1. From the Sign In page ([access.brookfieldrps.com](https://access.brookfieldrps.com)) click on the *Forgot your password* link, shown in the screenshot below.

Brookfield RPS ACCESS

Please be advised that you may experience intermittent downtimes with Brookfield RPS Access on Sunday, March 1st, between 9 a.m. and 5 p.m. EST. We apologize for any inconvenience this may cause.

### Sign In

myuserid@email.com

.....

Remember me?

**Sign In**      BROKER REGISTRATION

Forgot your password

English | Français

2. From there, enter your username in the space provided.

Brookfield RPS ACCESS

### Forgot your password?

To reset your password, enter your username. We will send you an email with instructions to reset your password.

.....

**Submit**      Cancel

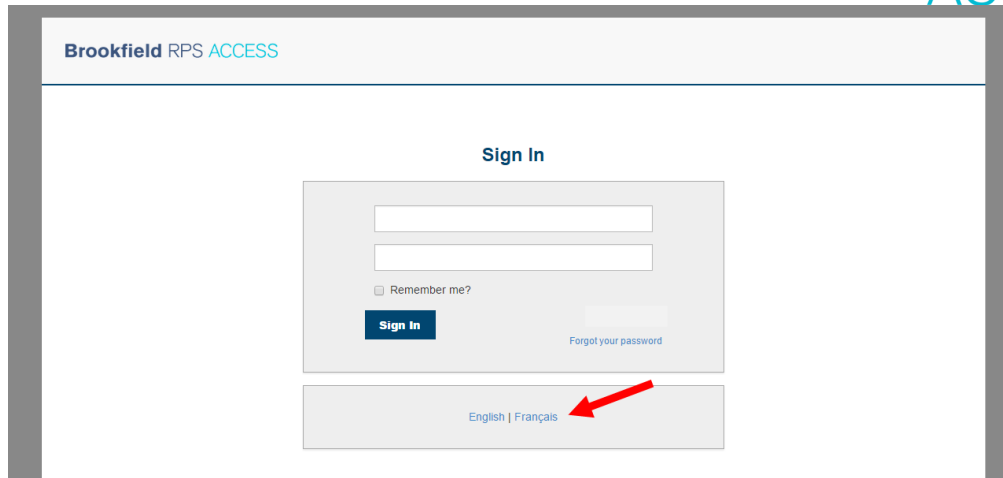
Need help? Please contact us on 1877 658 8258.

3. Click the Submit button.
4. If your username is a registered user for Brookfield RPS Access, you will be sent an email with a link to reset your password.

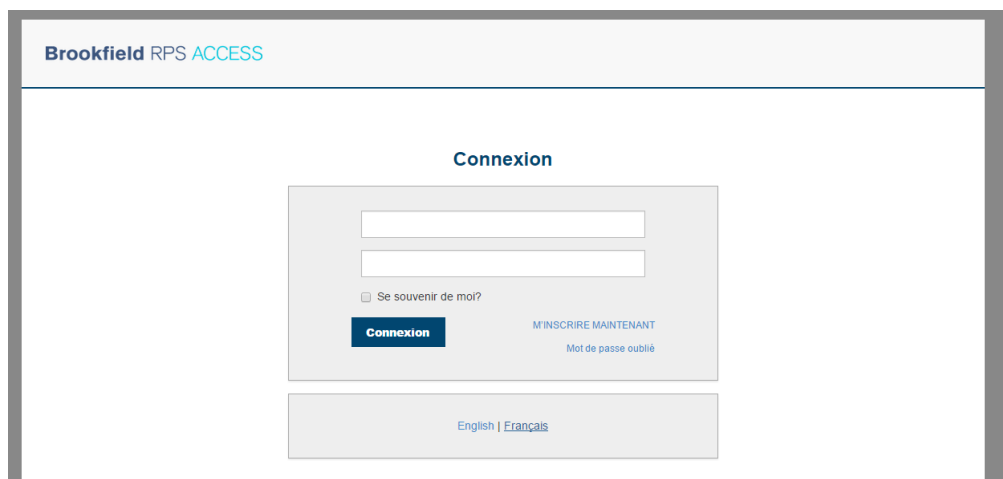
*If you do not receive an email with instructions on how to reset your password, please contact our call centre toll-free at (877) 658-8258.*

## Changing the Language Preference

The default language for Brookfield RPS Access is English; however, if you wish to change the language to French (or back to English if you previously changed it to French), please follow the instructions below:



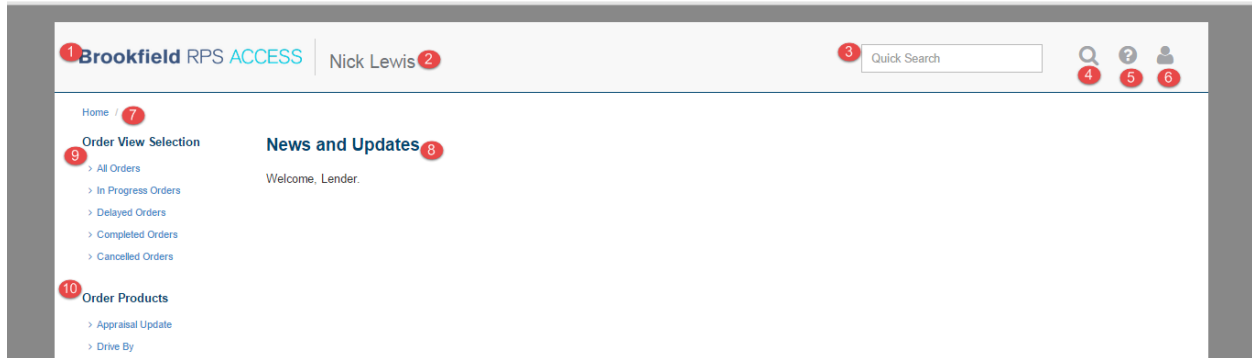
1. From the login page ([access.brookfieldrps.com](https://access.brookfieldrps.com)) click on the *Français* link, shown in above screenshot. (Or English if you are already in French.)
2. The language of the login page will now change to French, as you can see in the screenshot below. You can now login and the language inside Brookfield RPS Access will be French.



## Overview of Brookfield RPS Access

Brookfield RPS Access was built to ensure an efficient and intuitive process for placing and receiving appraisal orders. Before you get started, we encourage you to learn how to best navigate the system.

Below is an overview of where you can find all the main features in Brookfield RPS Access.



### ***Navigating the header:***

The first six (6) items we will review are all parts of the header section of Brookfield RPS Access.

- 1. Home / Brookfield RPS Logo** – Clicking on the Brookfield RPS Access logo in the upper left-hand corner is a quick link back to the home screen. *The logo is always visible no matter where you are within Brookfield RPS Access.*
- 2. Username** – Your username will always be visible in the header of Brookfield RPS Access
- 3. Quick Search** – To quickly locate an order, type the Order ID or Internal Reference # for the order into the box provided. A list of matching orders will start to show up below. Select your order from the list and you will be taken to the Order Details for that order
- 4. Advanced Search** – If you need to run a more complicated search query than Quick Search will accomplish, then you can click on the magnifying glass icon in the header to be taken to the Advanced Search. The Advanced Search page, which we will cover in more detail in the Search section, allows you to use more criteria, like date ranges for when the appraisal was completed, filed, last modified or created, and more.
- 5. Help** – To access any support materials for Brookfield RPS Access, you can click on the question mark icon in the header. Here you can access the manual, training video as well as any other support items as they become available.
- 6. User Administration** – Clicking on the user icon in the header will take you to the User Administration section where you can reset your password, customize order views and set-up email notifications.

### ***Navigating below the header:***

- 7. Location / Bread Crumb Trail** – Just below the header is the “bread crumb trail”, which shows you where you currently are located within Brookfield RPS Access. In the screenshot it shows Home, and if you were to go to the Help section, it would change to read: Home / Help. Both items in the bread crumb trail (i.e. Home and Help) are hyperlinks which you can use to navigate back to these distinct screens.

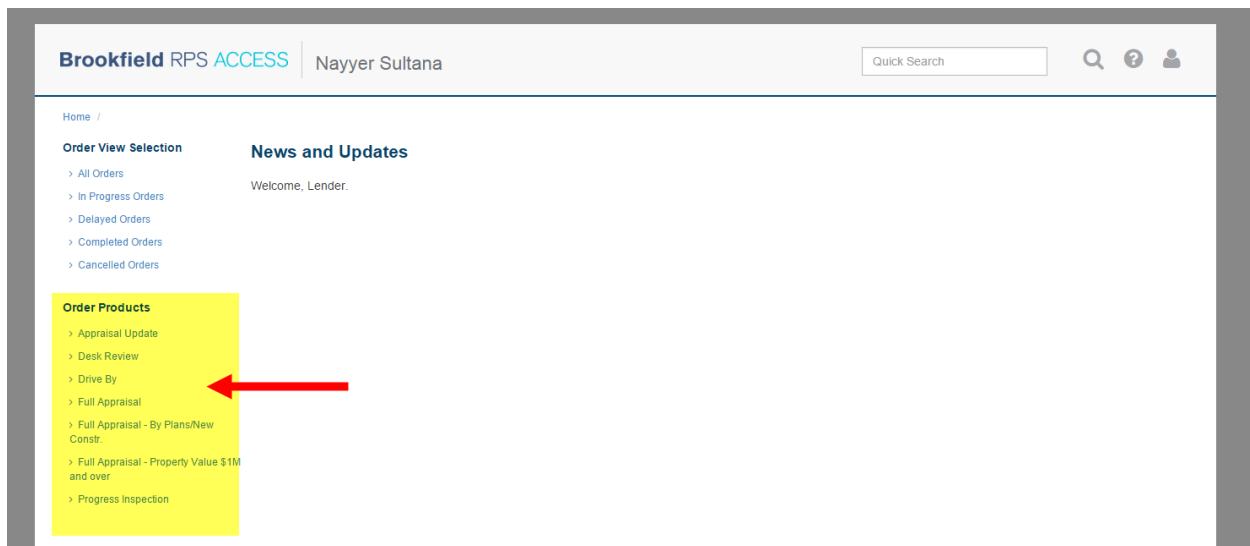
8. **News and Updates** – The News section is where you will find any announcements or information that Brookfield RPS wishes to make you aware of. This could be a new product that is now available or changes to the system.
9. **Order Views** – The Order View Selection section is where you can view your orders, based on their status, without having to do an advanced search. We have provided you with some commonly used views, including: delayed, completed and in progress. We will get into more detail on this, in the *Viewing Orders* section.
10. **Order Products** – Order Products is where you will start if you wish to place an order. Here you see a complete list of all products available to order. To get started you would click on the product you wish to order, from the list. We will get into more detail on how to place an order in the next section.

## Placing an Order

The main function you will use in Brookfield RPS Access is to place an order for an appraisal. In this section we will walk you through all necessary steps you need to take to submit a complete and detailed order.

### Accessing the Order Form

1. From the left sidebar, under Order Products, select the product you wish to order. For this example we will select Full Appraisal, as it is the most commonly ordered product. (See screenshot below.)



2. Once you have selected the product, you will be taken to the order form.

NOTE: The products you have available to you may be different than what you see in the screenshot above. If you are ordering a Progress Inspection, please see *Ordering a Progress Inspection* for more details.



## Completing an Order

1. The first step in the ordering process is to select the address, as is shown in the screenshot below. As you type into the fields, you may be shown suggestions for the address, which are there to save you time.

**QUICK TIP:** Take a look at the above screenshot, which shows the first steps in the Full Appraisal ordering process. You will notice we have highlighted the order header to illustrate where you are in the five-step ordering process. We are in the first step, which is to select the address.

2. Once you have entered in the complete address, click the blue *Continue* button.
3. As part of the Select Address step, you are next asked to validate the address you have entered (seen in the following screenshot). Select the check-box next to the address which matches the address you are ordering for, and then click the blue *Continue* button.

### NOTE:

- If the address you are ordering for is not an option and you have made an error entering in the address, click the blue *Back* button to re-enter the address correctly. (*Continued on next page*)

- If the address you are ordering for is not an option and you are confident this is the correct address, click the *Address not listed?* link. This allows you to bypass the validation, but warns you that addresses which are not validated may be subject to delays. If you are comfortable with this, click the blue *Continue* button.

**QUICK TIP:** At any time during the order process you can click the blue *Back* button to return to the previous screen and make changes to what you had previously entered. You also have the option to click on the blue *Cancel* button, which will cancel and delete the order. And lastly, you can click the blue *Continue* button to proceed to the next step in the ordering process.

4. The next step is the Order Details (as is shown in the screen shot below). Fill out all the necessary fields and click the blue *Continue* button.

Brookfield RPS ACCESS | groupmanagerfbc@brookfieldrps.com

Home / Full Appraisal

Order View Selection

- > All Orders
- > In Progress Orders
- > Delayed Orders
- > Completed Orders
- > Cancelled Orders

Order Products

- > Appraisal Update
- > Appraisal Verification
- > Desk Review
- > Drive By
- > Foreclosure Drive-By
- > Foreclosure-Full Appraisal
- > Full Appraisal
- > Full Appraisal - 2-4 plex
- > Full Appraisal - By Plans/New Constr.
- > Full Appraisal - Relocation
- > GIV
- > Progress Inspection
- > Property Visit Certificate
- > Vacant Land

Full Appraisal for 510-318 King St E, Toronto, ON M5A 0C1

Client \*      Branch/Transit \*      Originating Transit      Branch Logon ID

email@email.com      PRIMARY      MLB122      loginID

Notification Email Address(es)      Internal Reference

email@email.com      MLB122-155

Separate multiple addresses with a semi colon

Appraisal Information

Transaction Type \*      Estimated Market Value      Condition Date \*      Report Language

Refinance      325000      2015-02-14       English  French

Special Instructions (max. 1000 Characters)

Appraisal Add Ons

Market Rents     Sales Maps     Title Verification     Foreclosure Affidavit     Comparables/MLS     Comparables/Photos     As Renovated

Legal Description

Back    Cancel    Continue

**QUICK TIP:** The Special Instructions and Legal Description boxes can be expanded by clicking on the bottom right corner of their respective boxes and dragging them down and to the right.

Special Instructions (max. 1000 Characters)

Appraisal Add Ons

Market Rents     As Is + As Improved

Legal Description

- The next step is the Contact Information (as is shown in the next screen shot). Start by entering information for the applicant and other key contacts, and if applicable, navigate to the other tabs to enter contact information for the builder, listing agent and condo / strata manager. Once completed, click the blue *Continue* button.

The screenshot shows the 'Contact Information' step of the 'Full Appraisal' process. The breadcrumb trail is 'Home / Full Appraisal'. A progress bar at the top indicates the current step: 'Select Address' > 'Order Details' > 'Contact Information' (highlighted in yellow) > 'Confirmation' > 'Attachments'. The main heading is 'Full Appraisal for 510-318 King St E, Toronto, ON M5A 0C1'. Below this, there are tabs for 'Contact', 'Builder', 'Listing Agent', and 'Condo/Strata Manager'. The 'Contact' tab is active, showing a form with the following fields:

- Applicant Name \***: Joseph Smith
- Applicant Email**: joseph@smith.com
- Contact Name \***: Connie Reid
- Phone \***: 4165555555
- Alternate Phone**: (empty)
- Mobile Phone**: (empty)
- Contact 2 Name**: (empty)
- Contact 2 Phone**: (empty)
- Contact 2 Mobile Phone**: (empty)

At the bottom right of the form area, there are three buttons: 'Back', 'Cancel', and 'Continue'.

- The next step is the Confirmation, as is shown in the screenshot below. This is where you will see the pertinent information about the appraisal you are ordering.

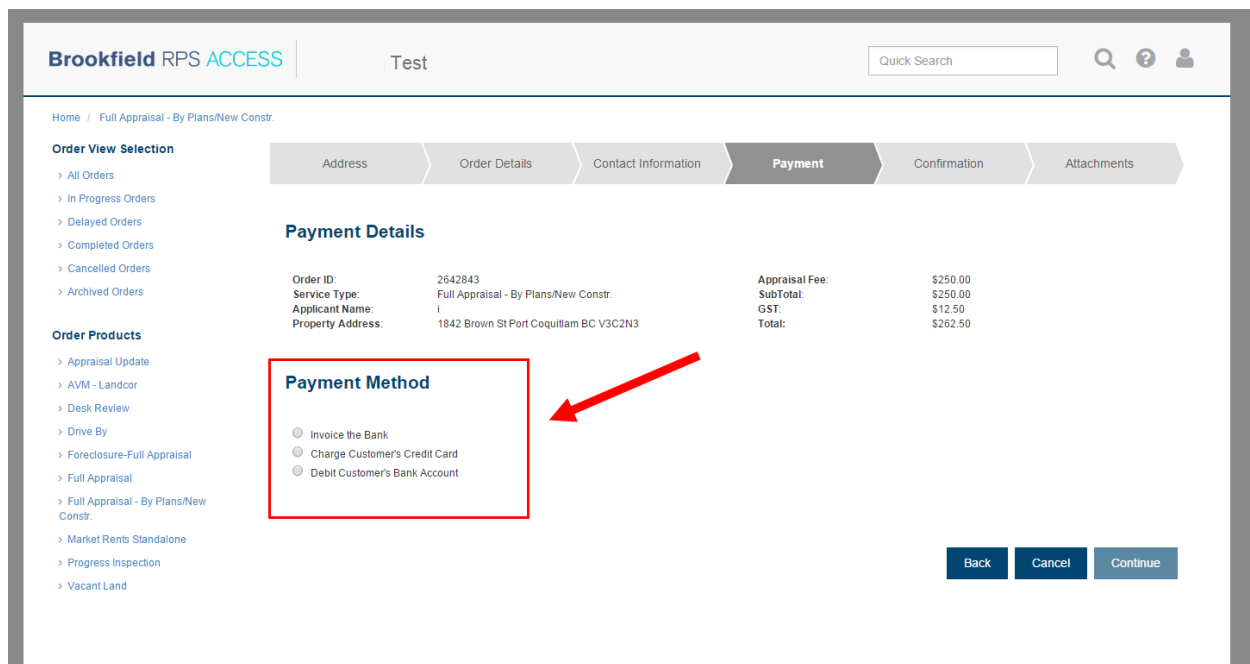
The screenshot shows the 'Confirmation' step of the 'Full Appraisal' process. The breadcrumb trail is 'Home / Full Appraisal'. A progress bar at the top indicates the current step: 'Select Address' > 'Order Details' > 'Contact Information' > 'Confirmation' (highlighted in yellow) > 'Attachments'. The main heading is 'Order Request Submitted'. Below this, a message states: 'Your order request has been submitted. Thank you for choosing Brookfield RPS.' The following information is displayed:

- Applicant Name:** Joseph Smith
- Order ID:** 2533828
- Service Type:** Full Appraisal
- Add-On(s):** Market Rents;
- Property Address:** 510 318 King St E Toronto ON M5A0C1

At the bottom right of the form area, there is a button labeled 'Upload Attachment'.

## Payment Options (This functionality may or may not be available to you.)

1. Next you will be taken to the Payment step in the ordering process. Here you are asked to review the payment details. You have three (3) options for coordinating payment, which include:
  - a. **Invoice Payment** – For instructions on how to pay by being invoiced, go to step 2.
  - b. **Pay by Credit Card on Customer’s Behalf** – For instructions on how to pay by credit card on your customer’s behalf (i.e. customer has authorized you to do so), skip to step 4.
  - c. **Debit Customer’s Bank Account via EFT** – For instructions on how to pay by debiting your customer’s bank account, using your client’s EFT (electronic funds transfer) information, skip to step 8.



### Invoiced Payment

2. To be invoiced, select the *Invoice the Bank* radio button and click the blue *Continue* button.
3. Next you will be taken to the Confirmation page. Here you will find a summary of details about your appraisal order, including confirmation that your payment has been received. Your Order ID # will be displayed here as well, so you may wish to make a note of it for future *Quick Searches*.

### Pay by Credit Card, on the Customer’s Behalf

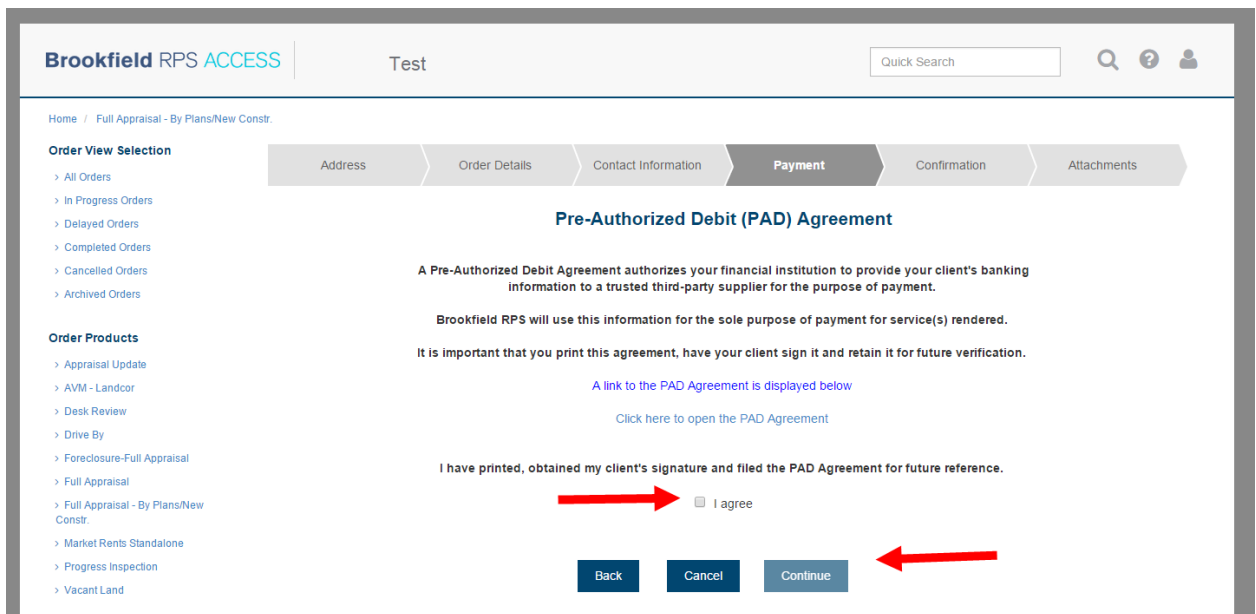
4. Select the *Charge Customer's Credit Card* radio button and click the blue *Continue* button.
5. A pop-up will appear (as is shown in the next screenshot) advising you that you are being transferred to a secure payment page. Click the *OK* button if you are comfortable with this process. If you are not, click the *Cancel* button, which will stop the payment process.

- The secure payment page looks like the screenshot you see below. Here, you are asked to enter in your client's credit card information. Once completed, click the *Submit Payment* button. Or, if you wish to cancel the payment, you can click the *Cancel* button.

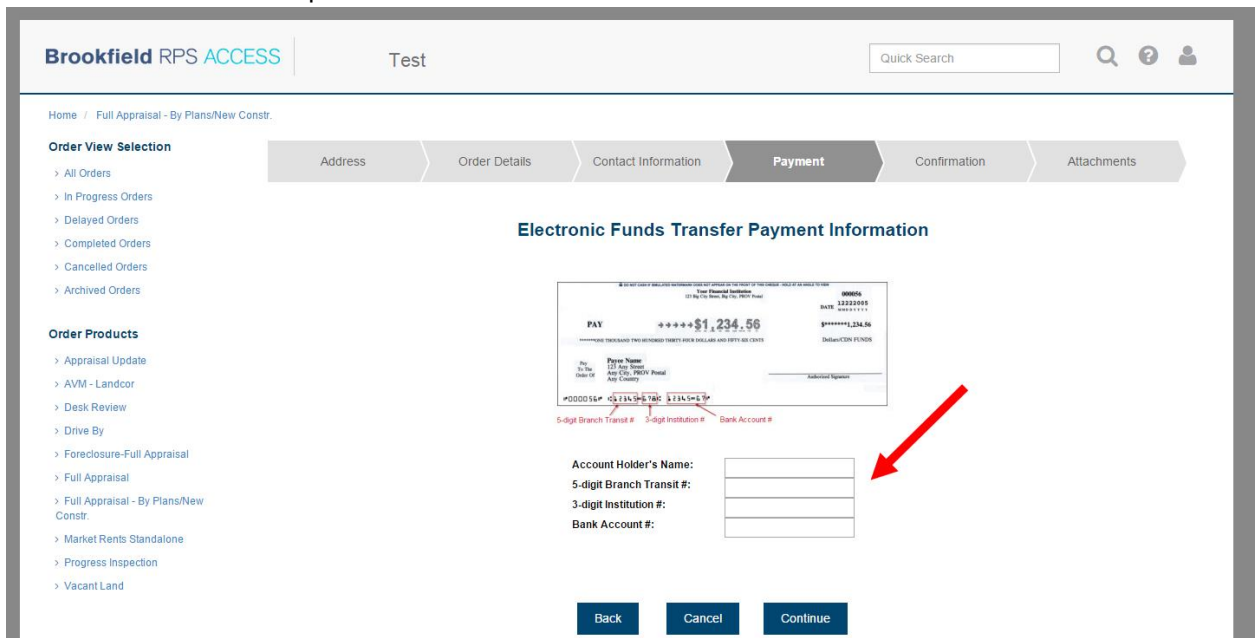
- Next you will be taken to the Confirmation page. Here you will find a summary of details about your appraisal order, including confirmation that your payment has been received. Your Order ID # will be displayed here as well, so you may wish to make a note of it for future *Quick Searches*.

## Debit Client's Bank Account via EFT:

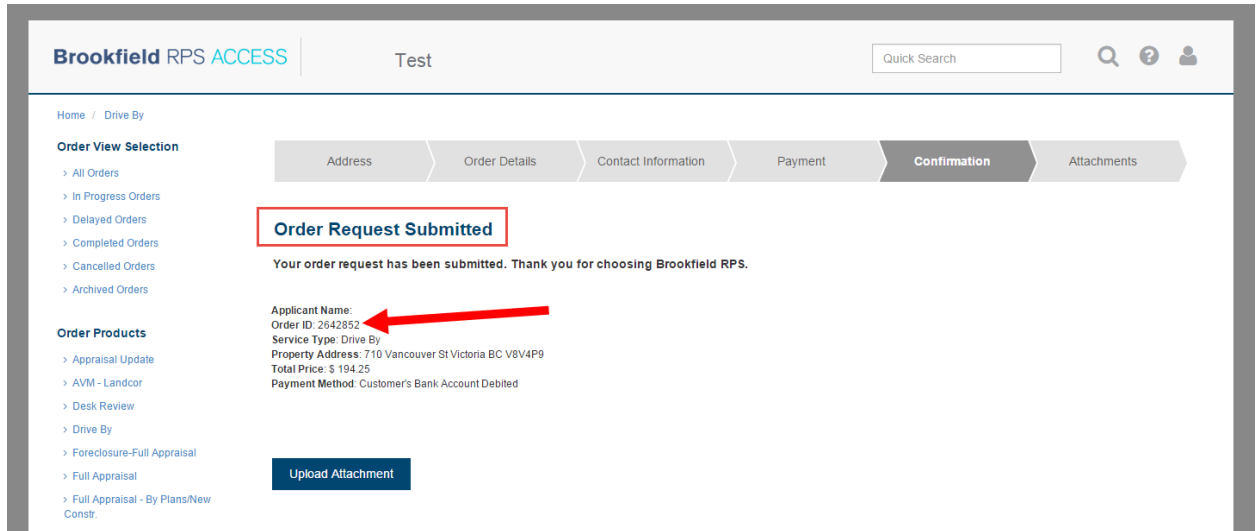
8. Select the *Debit Customer's Bank Account* radio button and click the blue *Continue* button.
9. You will be taken to a Pre-Authorization Debit Agreement (PAD) page (as you see in the screen shot below).
10. Review the information displayed and click on the link to view the PAD Agreement. If in agreement, select the *I agree* radio button and click on the blue *Continue* button.



11. You are taken to a screen prompting you to fill out Electronic Fund Transfer Information. Fill out the information requested and click on the blue *Continue* button

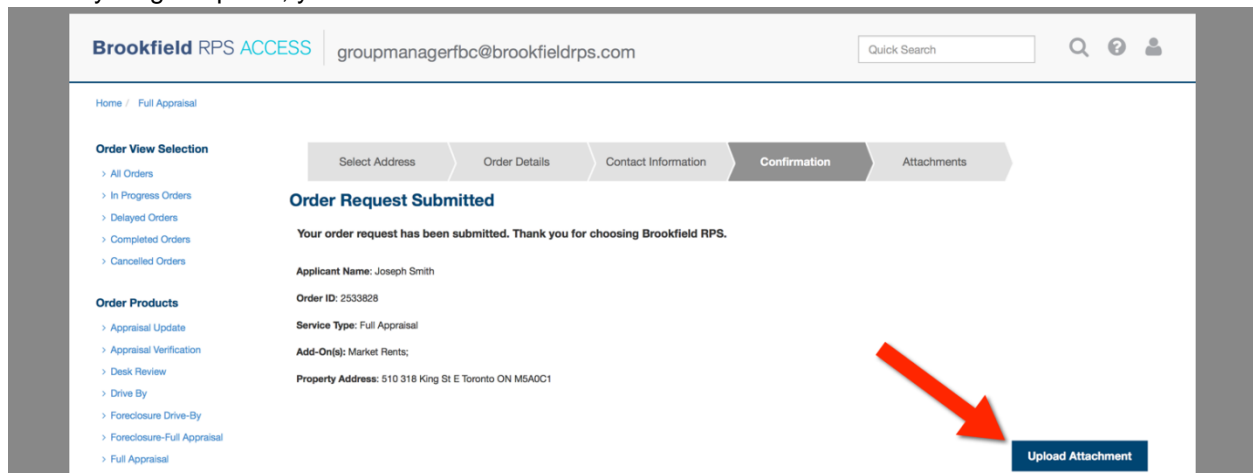


12. Next you will be taken to the Confirmation page (like the one you see below). Here you will find a summary of details about your appraisal order, including confirmation that your payment has been received. Your Order ID # will be displayed here as well, so you may wish to make a note of it for future *Quick Searches*.

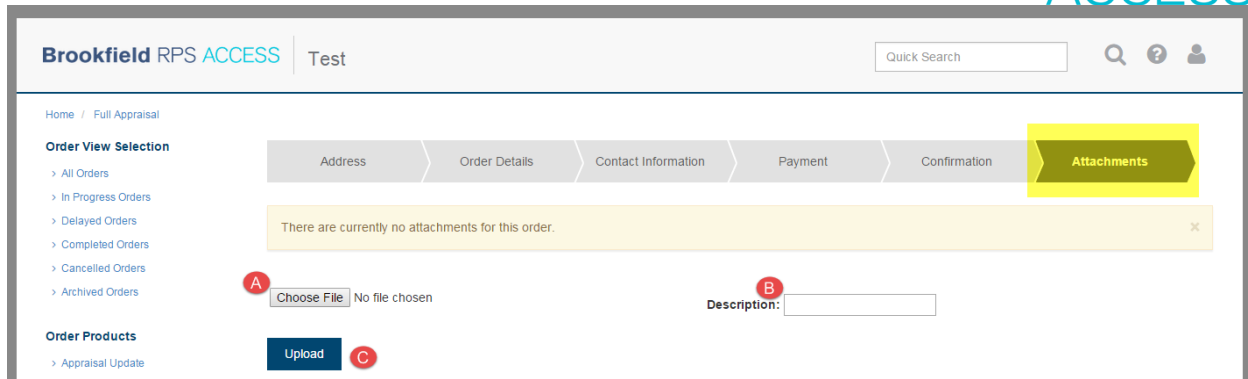


## Uploading Documents

13. At this point, your order has been submitted and you are done; however, you still have the opportunity to upload any documents the appraiser may require or find useful while doing their assessment. If you have documents, such as property / builder specifications that need to be uploaded, click on the blue *Upload Attachment* button (shown in the next screen shot) and continue to step 14. If you do not have anything to upload, you are done.



14. In the Attachments step, click on the Browse... button, as is shown in step A in the screenshot that follows. From there, you can locate the attachment you wish to upload from your file directory.



15. If you want to add a description to the file, you can enter that in the description field, as is shown in step B in the screenshot above.

16. Click the blue *Upload* button once you are ready.

## Ordering a Progress Inspection

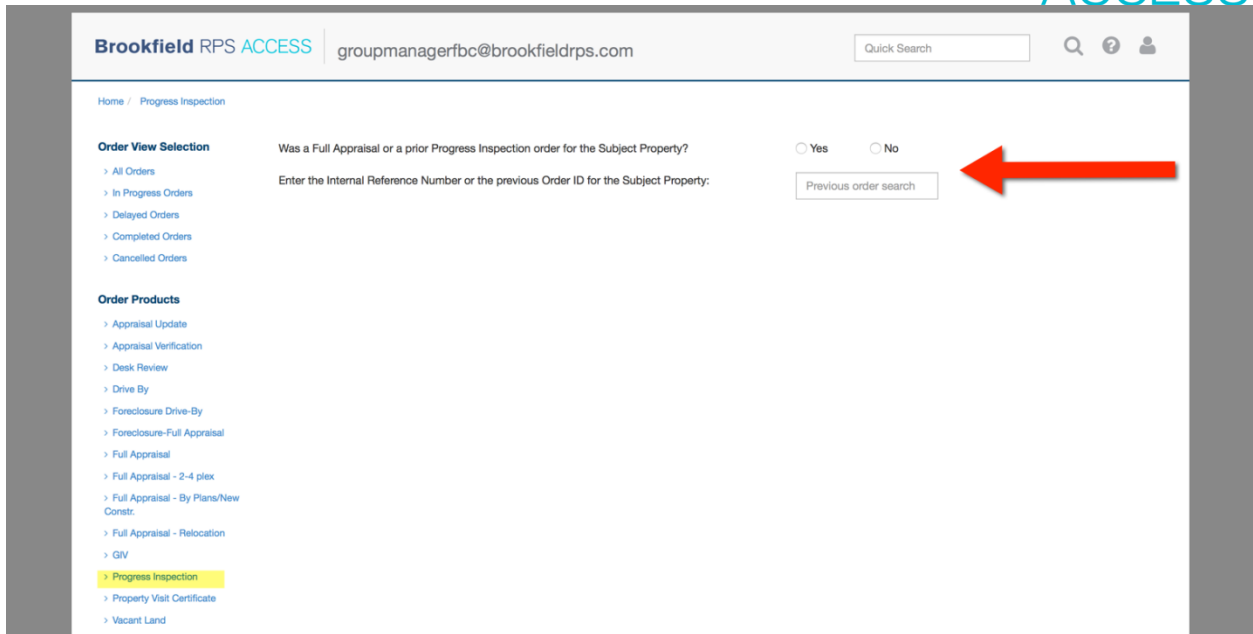
Ordering a Progress Inspection is similar to ordering a full appraisal, however at the beginning of the process, you are asked to answer a simple yes / no question – which is: “Was a full appraisal or a prior progress inspection ordered for the subject property?”

- **YES:** If a report was already completed for this property previously, select ‘Yes’ and enter the internal reference # or Order ID for the completed order. Once the correct information has been entered, a blue *Continue* button will appear and you can click on it to proceed.

**QUICK TIP:** The purpose of this step is to save you time. Information from the previously completed report will be auto-populated into the new order, eliminating the need for you to re-type.

- **NO:** If a report has not been completed for this property previously, click ‘No’ and a blue *Continue* button will appear and you can click on it to proceed. (NOTE: The blue *Continue* button will not appear until you have responded to the question.)





NOTE: Once you click on the blue Continue button the order screens are the same as you see for the Full Appraisal Order. For assistance completing an order see the section entitled *Placing an Order*.

## Order Status Email Notifications

Order status email notifications can be set-up in two ways:

1. For one order - during the order placement process.
2. For all orders - through your Manage My Account settings.

### Setting Up Email Notifications - During the Order Process

When you place an order, you are given the opportunity to set-up email notifications for that order. In the second step of the ordering process, called Order Details, there is a field (highlighted in the next screenshot) asking you for notification email addresses. You can enter in multiple addresses separated by semi-colons, and each will be notified of the following events:

- Order created
- Appointment date set
- Delay encountered
- Order completed
- Order cancelled

Please note: If you do not see email notifications during the ordering process, this functionality may not be available to you.

The screenshot displays the 'Order Details' step of a 'Full Appraisal for 510-318 King St E, Toronto, ON M5A 0C1'. The 'Notification Email Address(es)' field is highlighted in yellow and contains the text 'email@email.com'. Below this field, a note states 'Separate multiple addresses with a semi colon'. Other fields include 'Client', 'Branch/Transit' (PRIMARY), 'Originating Transit' (MLB122), 'Branch Logon ID' (loginID), and 'Internal Reference' (MLB122-155). The 'Appraisal Information' section includes 'Transaction Type', 'Estimated Market Value', and 'Condition Date'.

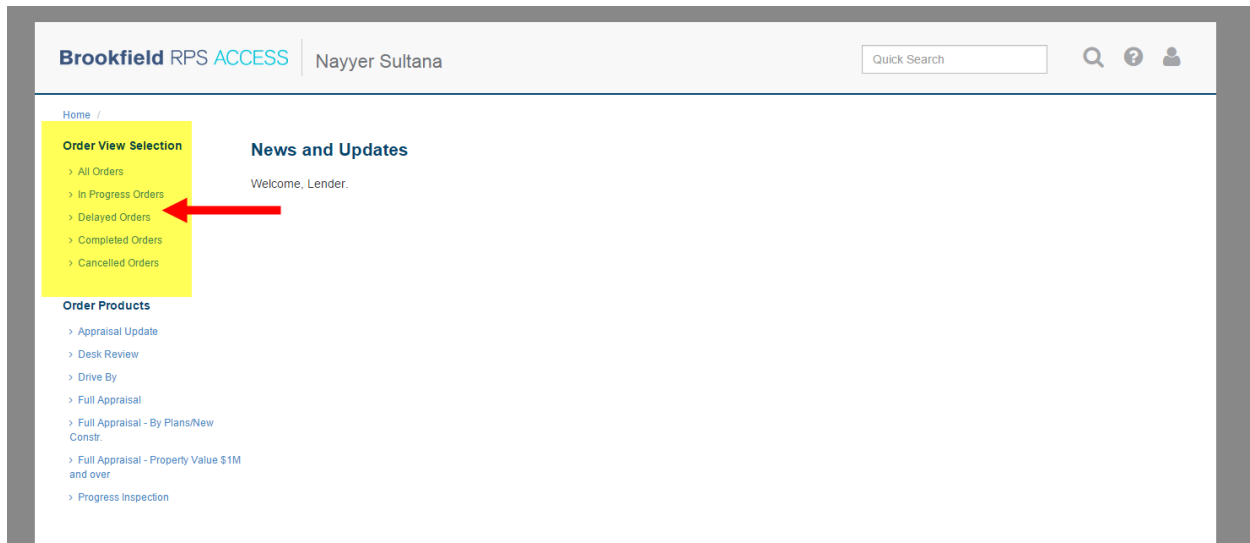
### Setting up Email Notifications - In Manage My Account Settings

If you want to standardize email notifications for all of your orders, you can do this in your Manage My Account settings.

Please see the *Manage My Account* section for more information on this.

## Viewing Orders

After an order has been submitted, you may need to locate it and review its details. In order to locate the order, you can use Quick Search or the Advanced Search functionality (see the *Search* section of this guide for more details on these) or you can use one of the various Order Views available in the Order View Selection area – highlighted in the screenshot below.

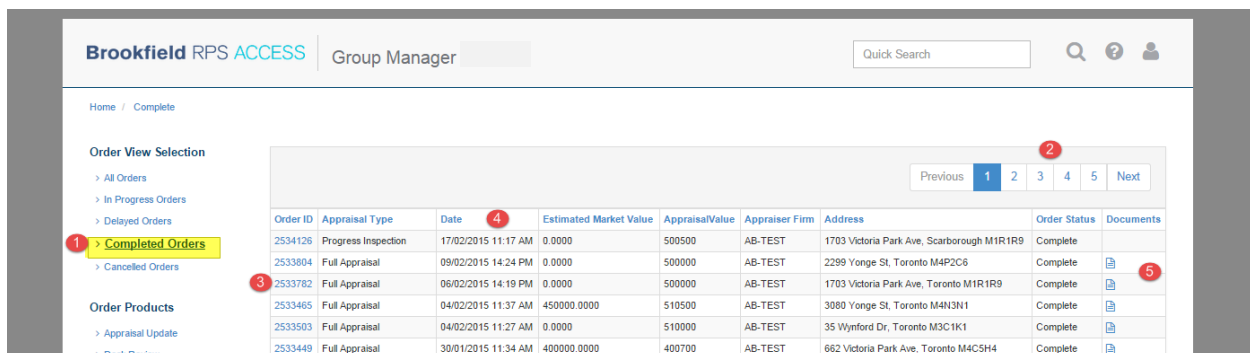


## Order Views

There are five (5) different order views available to you, including:

1. **All Orders** – A comprehensive view of all orders, regardless of status.
2. **In Progress Orders** – A view of all orders currently in progress.
3. **Delayed Orders** – A view of all orders that are currently delayed.
4. **Completed Orders** – A view of all orders that are completed.
5. **Cancelled Orders** – A view of all orders that were cancelled.







When you select any of the views above, you will be taken to a list of all orders that meet the specified criteria (i.e. in progress, delayed, etc.), displayed as follows:



1. **Order View** – For the example shown in the screen shot above, we are looking at the Completed Orders view, which shows all orders that have been completed.

2. **Pagination** – This is where you will navigate to additional pages of orders that have resulted from this view. As more orders are completed, more pages will be added. 10 orders are shown on each page.
3. **Go to Order** – To go to an order that has shown up in the results, click on the blue text, which is hyperlinked in the Order ID column. You will then be taken to the Order Details for that order.
4. **Sort Orders** – By clicking on the columns headers, you can sort the results by the information in that column. For example, if you click on the Date column header, the orders will sort based on the date. Click the same column header again and the orders will sort again in the reverse order.
5. **Documents** – The last column is entitled Documents, which is where you can access quick links to download reports and / or invoices associated with each order.

**QUICK TIP:** Here is a quick reference you can use to identify what each icon represents in the Documents column:

	<b>Completed Appraisal Report</b>	A completed appraisal report is available and ready to be downloaded.
	<b>Certified Appraisal Report</b>	A completed appraisal report is available and ready to be downloaded, and it was completed by an appraiser with an EA* designation and is therefore a certified appraisal report.
	<b>Multiple Appraisal Reports</b>	This order has more than one appraisal report associated with it and all reports are ready to download.
	<b>CAR (Collateral Assessment Review) Report</b>	A CAR (Collateral Assessment Review) report is available to be downloaded for this appraisal report.
	<b>Archived or Filed Orders</b>	This order has been archived (filed).
	<b>Invoice</b>	An invoice is available for this order and is ready to be downloaded.

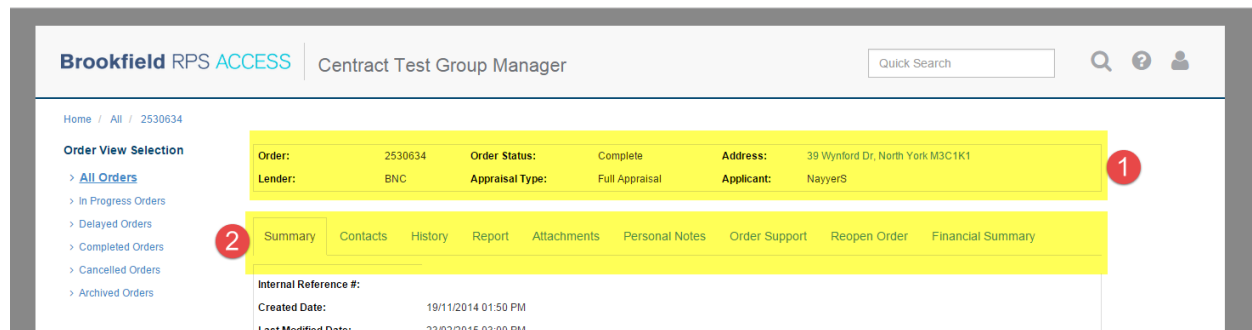
NOTE: The OEAQ (l'Ordre des évaluateurs agréés du Québec) requires that all electronically delivered appraisal reports completed by its members and insured under the OEAQ must include a Digital Certificate Signature Key effective June 1, 2007. This requirement affects all appraisers with the EA designation.

## Order Details – Navigation

1. Find an order you wish to review the details for by using Quick Search, Advanced Search or one of the Order Views found on the left sidebar (i.e. All Orders, In Progress Orders, etc.). If you are not familiar with how to locate an order – please see one of the following sections:
  - For Quick Search and Advanced Search see the section entitled *Search* in this user guide
  - For navigating the Order Views in the left sidebar, see the section entitled *Order View Selection* of this user guide
2. Once you find your order, click on the blue hyperlinked Order ID number to open up the Order Details.

## Navigating the Order Details

There are two (2) key items you should be aware of when navigating the Order Details.



1. **Order Header** – The order header, highlighted in the screenshot above, will remain visible no matter where you navigate within the Order Details. This is a great ‘quick reference’ for important information about the order, such as: the order #, order status, the address, the appraisal type and the applicant.
2. **Order Tabs** – The order tabs are located just below the order header and make for a more organized and intuitive experience. The main parts of the order are separated into eight (8) tabs, with the Summary tab being the default. We will walk through the purpose of each of the Order Details tabs below.

**QUICK TIP:** You will notice that the address in the order header is a hyperlink! When you click on this, it will take you to a map of where the property is located. **NOTE:** If the mapped location is not correct, this is likely because the address was not validated properly when you entered it during order placement.

## The Order Details Tabs

All of the order details are separated into 8 tabs. The Summary tab is the default tab that is open. Below is a walk-through of each of the tabs and the information you will find in each:

1. **Summary Tab** – This is where you will find all the general information about the order including: internal reference #, order creation date, required by date, transaction type, estimated market value, appraisal firm, and more.

- 2. Contacts Tab** – The contacts tab is where you will find all the contact information for the order. You can review and edit the information entered in this section. To make changes to contact(s), click on the blue *Edit* button.
- 3. History Tab** – The history tab includes any *events* that have occurred for this particular order. Examples of events are: order creation, order sent to appraiser, order accepted by appraiser, order status update (e.g. appointment set) and appraisal completed. Each event is time and date stamped.
- 4. Report Tab** – The report tab is where you go to download the appraisal report once it is completed. Some lenders may also have the option to download a CAR (Collateral Assessment Review) report.

**QUICK TIP:** The CAR report, which stands for Collateral Assessment Review, is an executive summary of what is contained in the appraisal and highlights any items that may be of concern when reviewing the report. Items are ranked as to whether they are high, medium or low level issues. **NOTE:** *Not all lenders and/or orders will have a CAR report available.*

- 5. Attachments Tab** – The attachments tab is where you will find any documents you uploaded during order placement, and also where you can go to upload additional documents – as long as the order is still open and not completed. You can upload documents for internal reference, but please note that anything uploaded here is visible to the appraiser.

**QUICK TIP:** If you are having troubles with uploading attachments, make sure the file size is less than 10MB, and that it is one of the following file types: Text (.txt), Word (.doc or .docx), XML (.xml), Excel (.xls or .xlsx), CSV (.csv), Rich text (.rtf), Adobe PDF (.pdf), Image (.png or .gif or .jpg or .jpeg), Video (.mpg) or Compressed (.zip).

- 6. Financial Summary Tab** – For some lenders, there is a tab entitled Financial Summary. This is where you will find an invoice which you can view and / or download.
- 7. Personal Notes Tab** – The Personal Notes tab is a great place to make your own notes about the appraisal order. These are only visible to you and your team/group, but they are not visible to the appraiser.
- 8. Order Support Tab** – Any issues or support required for the order can be entered into the Order Support tab. A representative from the Brookfield RPS customer support team will be in touch to address your concern in a timely manner.
- 9. Re-Open Order Tab** – For some lenders, there is a tab entitled Re-Open Order. This tab will only show when an order is completed. This is where you can append an order or request a value appeal.

## Canceling an Order

### Canceling an Order – During Order Placement

There may be times when you will need to cancel an order. If you are still in the process of placing an order and a blue *Cancel* button is visible, you can click it at any time to cancel the order. An example of this is shown in the screen shot below. If you cancel before the order has been submitted, then there is no fee to cancel.

The screenshot shows the Brookfield RPS ACCESS interface. At the top, the user is logged in as 'groupmanagerfbc@brookfieldrps.com'. The breadcrumb trail is 'Home / Full Appraisal'. The main navigation menu on the left includes 'Order View Selection' (All Orders, In Progress Orders, Delayed Orders, Completed Orders, Cancelled Orders) and 'Order Products' (Appraisal Update, Appraisal Verification, Desk Review, Drive By, Foreclosure Drive-By, Foreclosure-Full Appraisal, Full Appraisal, Full Appraisal - 2-4 plex, Full Appraisal - By Plans/New Constr., Full Appraisal - Relocation, GIV, Progress Inspection). The main content area shows a progress bar with five steps: 'Select Address', 'Order Details', 'Contact Information' (active), 'Confirmation', and 'Attachments'. Below the progress bar, the title is 'Full Appraisal for 510-318 King St E, Toronto, ON M5A 0C1'. There are tabs for 'Contact', 'Builder', 'Listing Agent', and 'Condo/Strata Manager'. The form contains the following fields: 'Applicant Name' (Joseph Smith), 'Applicant Email' (joseph@smith.com), 'Contact Name' (Connie Reid), 'Phone' (4165555555), 'Alternate Phone', 'Mobile Phone', 'Contact 2 Name', 'Contact 2 Phone', and 'Contact 2 Mobile Phone'. At the bottom of the form are three buttons: 'Back', 'Cancel', and 'Continue'. A large red arrow points directly to the 'Cancel' button.

### Canceling an Order – After Submission

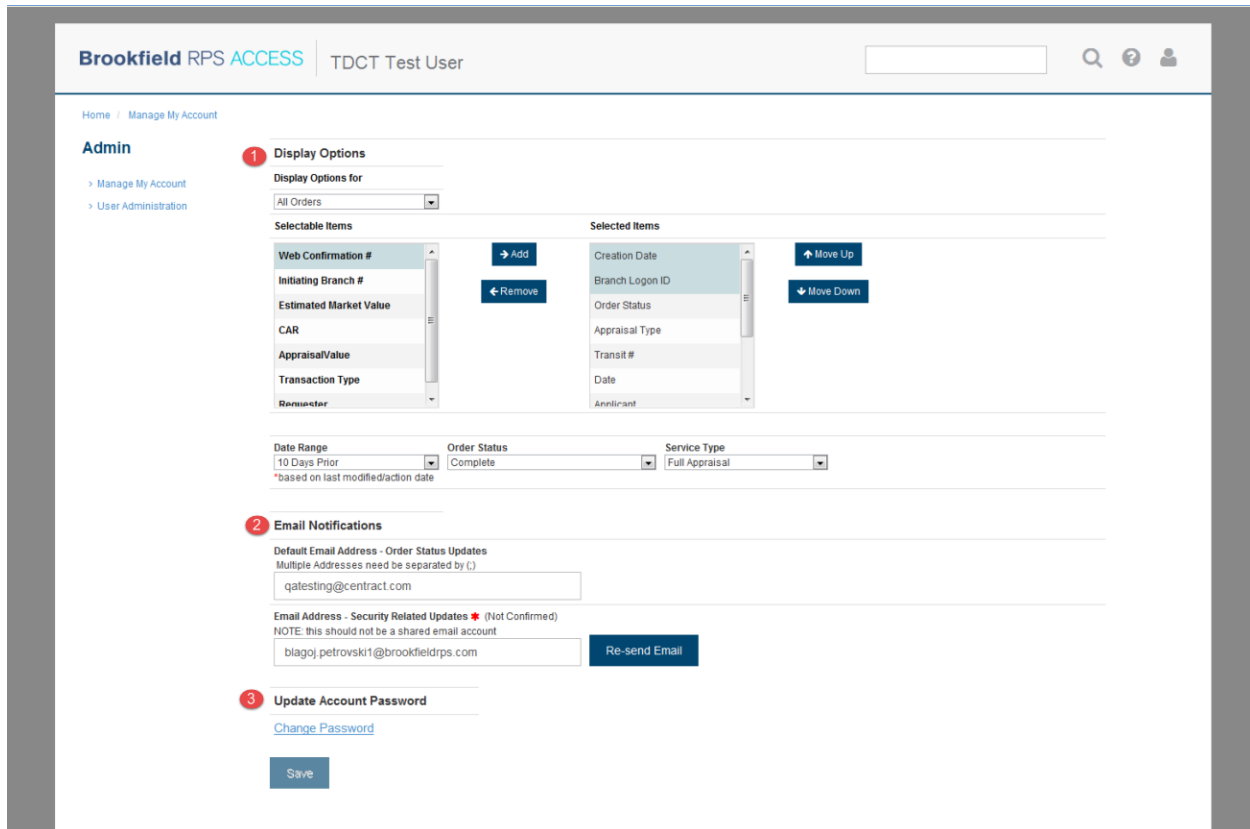
Once the order has been submitted, you may be subject to a cancellation charge, depending on how far the order has progressed at the time the cancellation is received.

To cancel an order that has already been submitted and is in progress, you must call the Brookfield RPS customer service team toll-free at (877) 658-8258. They will advise you if there will be any charges / fees to cancel.

## Manage My Accounts

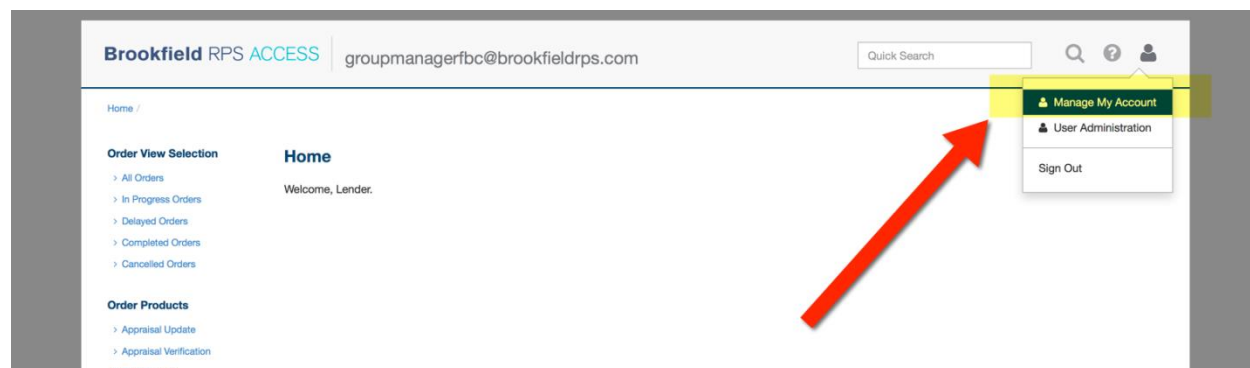
In the Manage My Account section of Brookfield RPS Access, you can do the following:

1. Customize your order views
2. Set-up your email notifications
3. Update your password



## Accessing Manage My Account

1. To access the Manage My Account section, click on the user icon in the header.
2. From the drop-down menu, select *Manage My Account*, as is shown in the screenshot below.

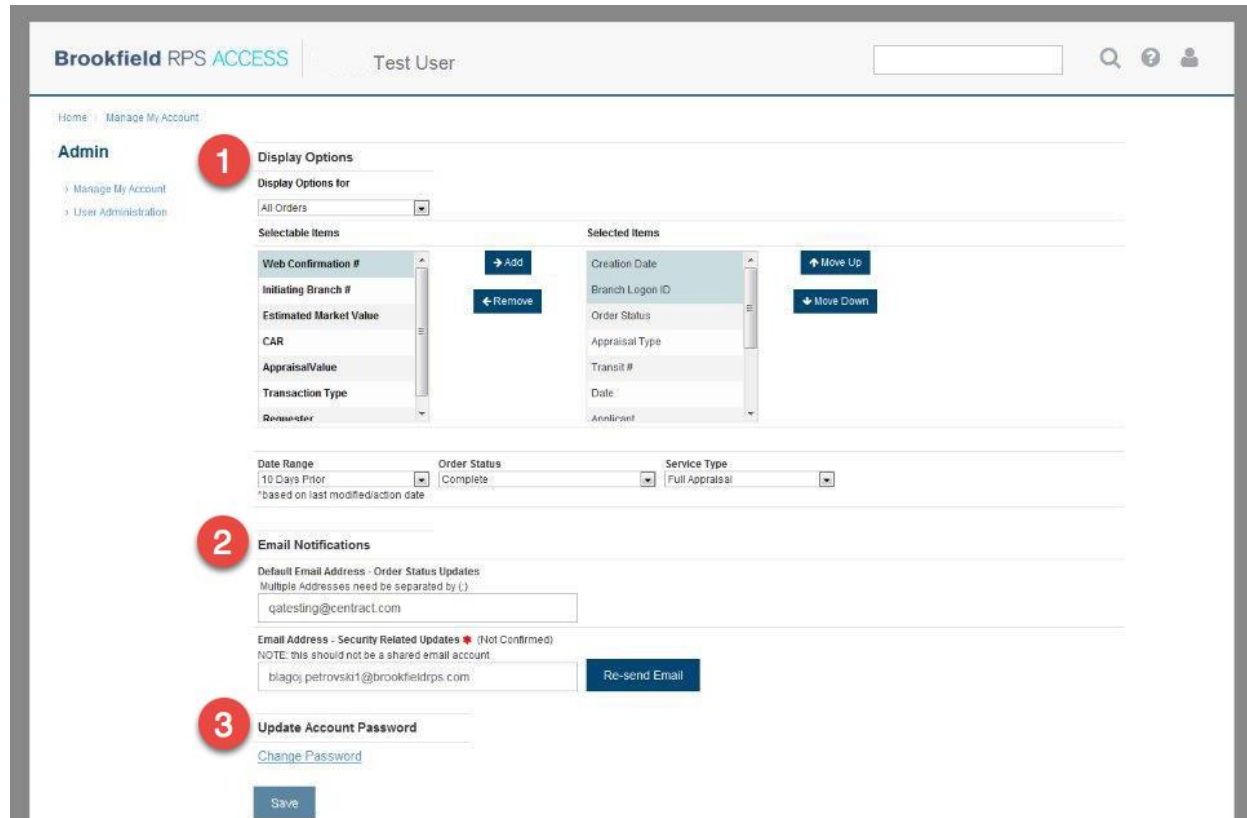




## Customize Your Order Views

From the Manage My Account section you can customize how the 'All Orders' *order views* appear.

The following is a list of items you can customize in your 'All Order' order view:



1. Fields (columns) to be displayed
2. Date range of orders to be displayed
3. Status of the orders to be displayed, in this view
4. Service type (i.e. type of appraisal product) to be displayed, in this view

### Here is how:

#### Display Option For:

1. Next to 'Display Option For' there is a drop-down menu. Select 'All Orders' from the drop-down.

#### Display Fields:

2. The next section entitled 'Display Fields' is where you will define which headers you want to appear across the top of the 'All Orders' order view columns.
  - **Selectable Items** (on left): This is a comprehensive list of all the fields (column headers) you can to add to the 'All Orders' order view.
  - **Selected Items** (on right): This is a list of all the fields (column headers) you currently have showing in your 'All Orders' order view.
3. To add items to the fields (column headers), select them from the 'Selectable Items' on the left, and then click the blue *Add* button.

- To remove items from the fields (column headers), select them from the 'Selected Items' on the right, and then click the blue *Remove* button.

## Date Range:

- The next section entitled 'Date Range' is where you define the age of orders which appear in this view. The age of the order is based on the last time it was modified. You can define the date range as anything between 1 day and 1 year.

## Order Status:

- The next section entitled 'Order Status' is where you define the status of the orders which appear in this view. For 'All Orders', it is most intuitive to leave this as 'Any Order Status'.

## Service Type:

- And lastly for display options, the section 'Service Type' is where you can define which type of appraisal products will appear in this view. For 'All Orders', it is most intuitive to leave this as 'All Appraisal Types'.

## Save:

- Once you make changes to any of the display options, be sure to click the blue *Save* button to keep these preferences.

## Set-up Your Email Notifications

The last item you can address in the Manage My Account section is to set-up your email notifications.

In this section you are asked to enter in two (2) email addresses for notification. Each of these serves a different purpose, which is outlined below.

The screenshot shows the 'Manage My Account' page in the Brookfield RPS ACCESS system. The user is logged in as 'Test User'. The 'Admin' section is active, showing 'Display Options' and 'Email Notifications'.

**Display Options:**

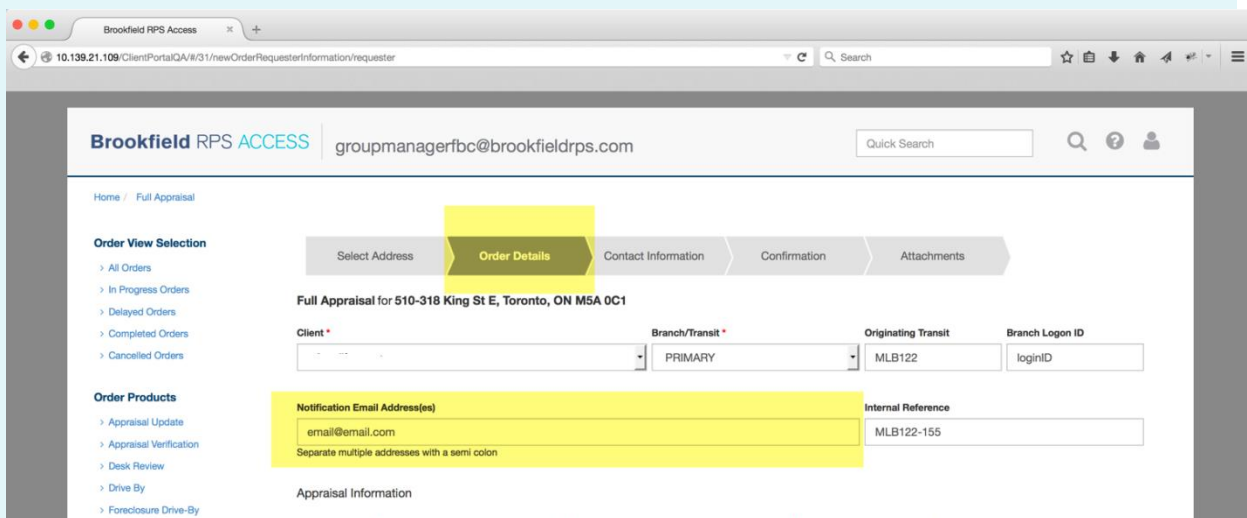
- Display Options for:** All Orders
- Selectable Items:** Web Confirmation #, Initiating Branch #, Estimated Market Value, CAR, Appraisal/Value, Transaction Type, Reinvestor.
- Selected Items:** Creation Date, Branch Legon ID, Order Status, Appraisal Type, Transit #, Date, Amortment.
- Date Range:** 10 Days Prior (based on last modified/action date)
- Order Status:** Complete
- Service Type:** Full Appraisal

**Email Notifications (highlighted in yellow):**

- Default Email Address - Order Status Updates:** Multiple Addresses need be separated by {}  
qalessing@centract.com
- Email Address - Security Related Updates (Not Confirmed):** NOTE: this should not be a shared email account  
biagoj.petrovski1@brookfieldrps.com
- Buttons:** Add, Remove, Move Up, Move Down, Re-send Email, Save.

- 1. Default Email Address – Order Status Updates:** Enter in the email address where you would like order status updates to go. If this field is left blank, order status updates will only be sent if you have noted where notifications sent during order placement (in the order form). Order status updates include:
  - Order created
  - Appointment date set
  - Delay encountered
  - Order completed
  - Order cancelled
- 2. Email Address – Security Related Updates:** Enter in the email where security related updates and confirmations should be sent. Security updates include: password changes and changes made to your account / profile. NOTE: This email address must not be a shared account.

**QUICK TIP:** You can set-up email notifications specific to an individual order while you are placing the order. During the second step called Order Details, there is a field for you to enter in email notifications, as you can see in the screenshot below. Each email you reference here will be sent notifications when / if: the order is created, the appointment date has been set, a delay has been encountered, the order has been completed and / or the order has been cancelled. *Be sure to separate each email address with a semi-colon.*



## Reset Your Password

It is recommended that you change your password on a regular basis, with every 30-60 days being best practice. When selecting your new password, make sure it meets the following requirements:

- Minimum of six (6) characters in length
- Contains at least one (1) numeric character (i.e. '0' – '9')
- Contains at least one (1) lowercase alpha character (i.e. 'a' – 'z')
- Contains at least one (1) uppercase alpha character (i.e. 'A' – 'Z')
- Contains at least one (1) special character (i.e. '#', '\$', '%', '&', '!', etc.)

To reset your review password from the Manage My Accounts screen:

1. Click the blue *Reset Password* button.
2. You will be taken to a screen that looks like the screenshot below, where you will be asked to enter in your new password and then type it in again to confirm it.
3. Click Submit, and you will then receive a confirmation message that your password has been reset.

The screenshot shows the 'Reset Password' interface within the Brookfield RPS ACCESS system. The page header displays 'Brookfield RPS ACCESS'. The main heading is 'Reset Password'. The form contains three input fields: 'User Name' with the value 'groupmanagerbc@brookfieldrps.com', 'New Password' with masked characters, and 'Confirm New Password' also with masked characters. A red circle with the number '2' is positioned to the left of the 'New Password' field. At the bottom of the form, there is a blue 'Submit' button and a 'Cancel' link. A red circle with the number '3' is positioned to the left of the 'Submit' button.

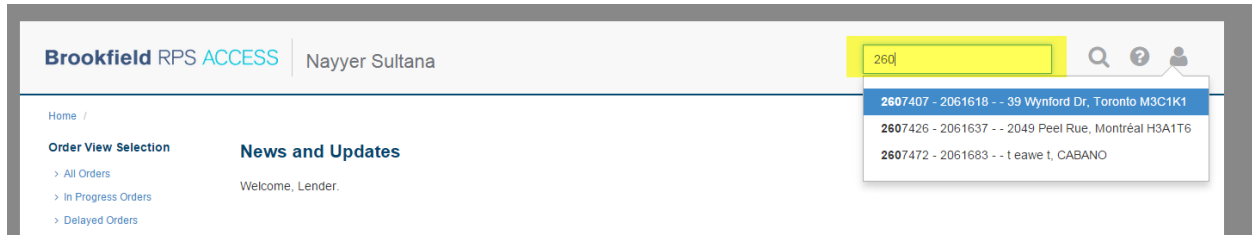
**NOTE:** *If you have forgotten your password and cannot get logged into Brookfield RPS Access, go to the previous section entitled *Forgotten Password*.*

## Search

There are two (2) types of search within Brookfield RPS Access. One is a Quick Search and the other is Advanced Search. Both are very useful, but whether you opt for Quick or Advanced really depends on what you're looking for.

### Quick Search

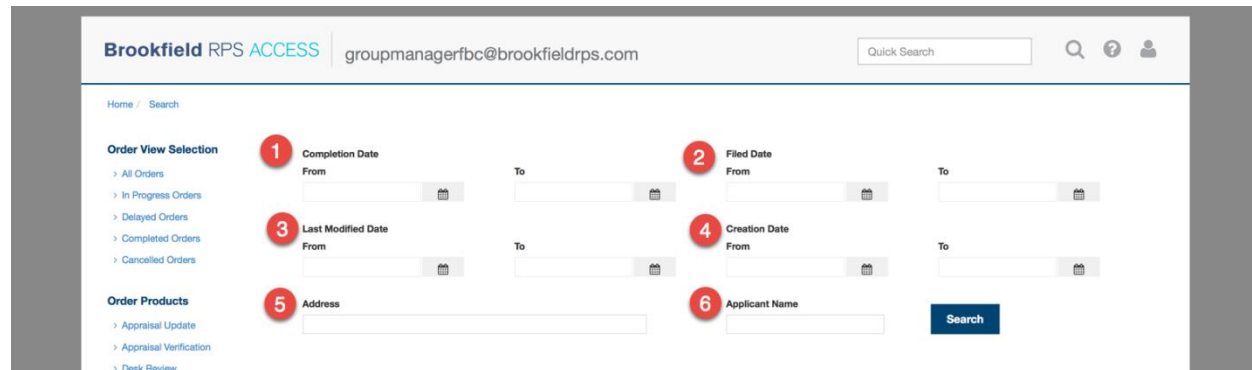
To quickly locate an order, type the Order ID or Internal Reference # for the order into the box provided in the header (as is shown in the screenshot below). A list of matching orders will start to show up below the search field. You can select your order from the list and you will be taken to the Order Details for that order.



### Advanced Search

If you need to run a more complicated search query than Quick Search will accomplish, then you can click on the magnifying glass icon in the header to be taken to the Advanced Search. The Advanced Search page allows you to use more criteria, which helps to narrow down your search.

There are six (6) different criteria you can use in your advanced search, as is shown in the screen shot below.



Search Criteria for Advanced Search:

1. **Completion Date** – Search by completion date, which means you can search between two dates when an appraisal order would have been completed.
  - a) Using the calendar icon to the right of the 'From' field – select the earliest date the order would have been completed.
  - b) Using the calendar icon to the right of the 'To' field – select the latest date the order would have been completed.
  - c) Click the blue 'Search' button and the results of your search will be displayed below.

2. **Filed Date** – Search filed orders by the date they were filed. Filed orders are orders that you requested to be filed away because no further actions are required, but you may wish to access these orders for future references. This will allow you to look up filed orders.
3. **Last Modified Date** – Search by the date the order was last modified (i.e. the appraisal was uploaded; an appointment was booked, etc.
  - a) Using the calendar icon to the right of the ‘From’ field – select the earliest date the order would have been modified.
  - b) Using the calendar icon to the right of the ‘To’ field – select the latest date the order would have been modified.
  - c) Click the blue ‘Search’ button and the results of your search will be displayed below.
4. **Creation Date** – Search by the date the order was created, i.e. ordered.
  - a) Using the calendar icon to the right of the ‘From’ field – select the earliest date the order would have been created.
  - b) Using the calendar icon to the right of the ‘To’ field – select the latest date the order would have been ordered.
  - c) Click the blue ‘Search’ button and the results of your search will be displayed below.
5. **Address** – Search by address of the property for the appraisal order you placed. Type in the street address and city / town and click on the blue ‘Search’ button. The results of your search will be displayed below.
6. **Applicant Name** – Search by the applicant’s name on the appraisal order. Start with the applicant’s last name and click on the blue ‘Search’ button. The results of your search will be displayed below.

## Help

By clicking on the question mark icon located in the header of Brookfield RPS Access, you can access all support materials available, including this user guide and training videos.

### Troubleshooting and FAQs

<p><b>Signing In</b></p>	<p><b><i>My login information is not working.</i></b></p> <p>If you are having trouble logging in to Brookfield RPS Access and have already attempted the instructions under 'Forgotten Password', please call us toll-free at: <b>1-877-658.8258.</b></p>
<p><b>Adding New Users or Deleting Users</b></p>	<p><b><i>How do I set-up a new user or delete a user?</i></b></p> <p>If you require a new user account setup or to delete a user, please call our customer service team toll-free at 1-877-658.8258.</p>
<p><b>Editing or Making Changes to an Order</b></p>	<p><b><i>How do I cancel or modify an order?</i></b></p> <p>If you have already submitted an order, or you need to modify an order that is already in progress, please call us toll-free at 1-877-658-8258.</p> <p>If you are still in the process of submitting an order and wish to cancel it, you can click the blue <i>Cancel</i> button at any time to cancel the order you are currently submitting.</p> <p><b><i>How do I add more contacts to an order I've already placed?</i></b></p> <p>You can edit contacts or add additional contacts to an in progress order from the Contacts tab, when you are viewing the Order Details (Note: <i>To locate an order, see the sections entitled 'Viewing Orders' or 'Search'.</i>)</p> <p>From the Contacts tab you will see a blue Edit button. Click on this and you can edit contact information already entered or add contacts.</p>
<p><b>Order Details – Map</b></p>	<p><b><i>The address hyperlink takes me to a Google map, but the property is not mapped properly.</i></b></p> <p>When you placed the order, in the first step, you were asked to enter in the property's address. If the address you entered was not properly validated and you still continued, this may have resulted in the address being improperly mapped.</p> <p>If you now have the correct address, you can call us toll-free at 1-877-658-8258 to update the address.</p>
<p><b>CAR Report</b></p>	<p><b><i>What is the CAR report?</i></b></p> <p>The CAR report, which stands for Collateral Assessment Review, is an executive summary of what is contained in the appraisal and highlights any items that might be of concern when doing your review.</p>