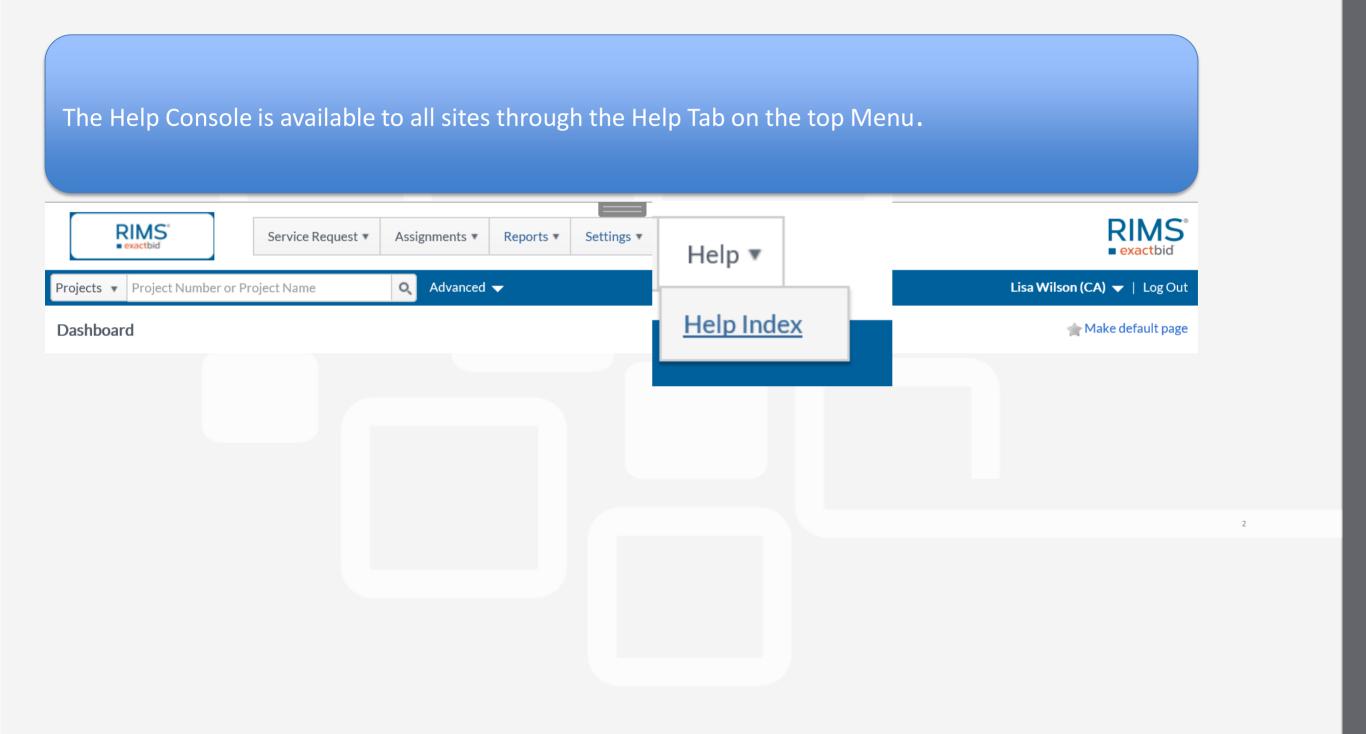


# Introducing RIMS Training and Documentation



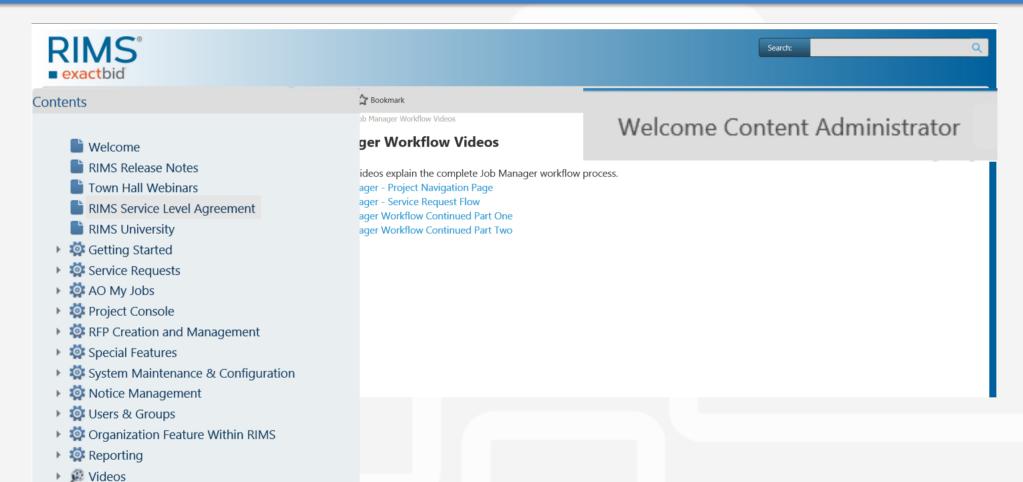
## **RIMS Help Console**







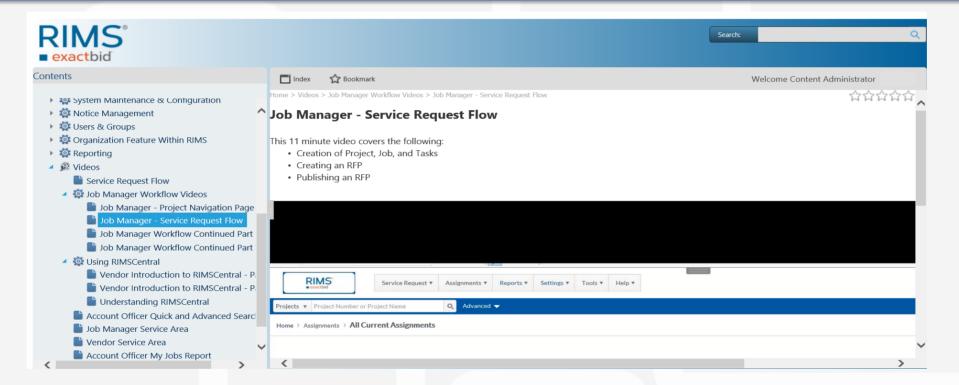
At the Help Console, RIMS Users will see Help Content that is specific to each user type.







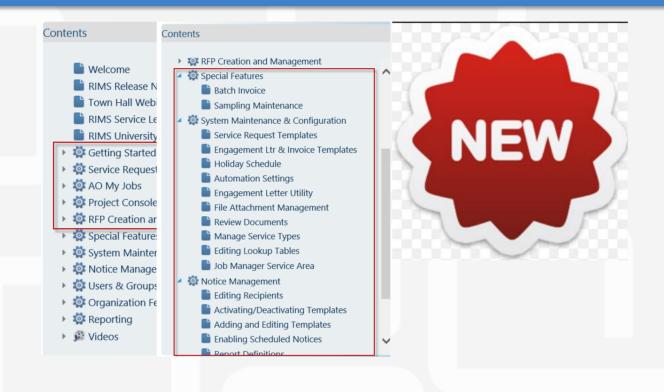
The Information found here will range from Release Notes, Recorded RIMS University Sessions and written Step by Step Documentation to Recorded Instructional Videos.



# RIMS Help Console



We currently have the full workflow from Service Request to the completion of the job ready in both written and recorded form and are regularly adding new material on new features and additional processes available in RIMS.





# Introduction and Overview of RIMS

October 2017

## What is the Purpose of RIMS?







Comply with Regulatory Requirements



Manage Records



Centralize Communication



Increase Efficiency



RIMS PROVIDES THE MEANS FOR THE LOAN ORIGINATION GROUP TO ORDER APPRAISALS AND SERVICES FROM REAL ESTATE PROFESSIONALS EFFICIENTLY WHILE MAINTAINING THE APPRAISAL INDEPENDENCE REQUIRED BY FEDERAL REGULATION

Loan Origination



Customer-facing department whose role is to book new loans

Appraisal Department



A part of the Credit Administration
Department whose role is to ensure
sound lending policy and adherence to
regulations

Independent
Professional/Real Estate
Appraisers



Independent Appraisers, Environmental and Construction Specialists who provide informed, unbiased evaluations



Loan Origination

Appraisal Department

Independent Professionals/Real Estate Appraisers



When a real estate loan is requested, the Account Officer orders an Appraisal through RIMS



The Appraisal Department will determine what type of Appraisal is required



The Appraisal
Department will send a
Request for Bids to their
Appraisal Panel



Loan Origination



Independent
Professionals/Real Estate
Appraiser







The Appraisal Department will send the Account Officer a request to authorize the Bid without revealing the name of the Appraiser The Appraisal Department will take all of the Bids into consideration and determine which ones are acceptable

The Appraisers will submit their Bids to the Appraisal Department



Loan Origination

Appraisal Department

Independent
Professional/Real Estate
Appraisers



The Account Officer will authorize one of the blind Bids through RIMS



The Appraisal Department will receive the authorization to proceed



The Appraisal
Department will execute
the Award and the
Appraiser will be notified



Loan Origination

Appraisal Department

Independent Professional/Real Estate Appraiser



The Appraisal Department will make the Appraisal, the Formal Review and the Invoice available to the Account Officer



The Appraisal will be pushed back to RIMS and the Appraisal Department will review the completed Report, determine if it is acceptable, and score the Appraiser on their work



Once the Appraisal is completed, the Vendor will upload the Appraisal and Invoice to RIMSCentral





**Account Officer** 



Both the Loan Origination side and the Credit Administration side log in to what is commonly know as "Core" RIMS



Both are bank employees and RIMS users, but they are different User Types



Job Manager





The independent real estate professionals, such as Appraisers, Environmental Specialists, and Construction Specialists, log in to a separate site called RIMSCentral. We will refer to these users as "Vendors."





#### The Account officer







The Account Officer attaches

Documents

The Account Officer approves the Rid

The Account Officer retrieves the reviewed Report and Ioan Documents are prepared







The Service Request Form creates a Project and Job with Tasks

Documents are attached to the

The Job Manager creates an RFP

The Job Manager views the Bid and sends a blind Bid to the Account Officer

The Job is awarded to the Vendor and an Engagement Contract is created

The JM Reviews the Report, grades the Vendor, and makes the Report and Review available to the Account Officer

#### The Vendors





The Vendor Views the RFP and places a Bid

The Vendor completes the Award and uploads the completed Report into RIMSCentral





#### The Account officer





The Account Officer completes the Service Request Form

The Account Officer attaches

Documents

The Account Officer approves the Bid

The Account Officer retrieves the reviewed Report and loan Documents are prepared

#### The Job Manager





The Service Request form creates a Project and Job with Tasks

#### Let's see what the Service Request looks like in RIMS

The JM Reviews the Report grades the Vendor and makes the Report and Review available to the Account Officer

#### The Vendors





The Vendor views the RFP and places a Bid

The Vendor completes the Award and uploads the completed Report into RIMSCentral