

Ordering and LOS Setup

- ☐ Revisit your existing configurations and workflows to ensure they're adaptable to UAD 3.6.
- ☐ Update LOS product codes, order templates, and reason codes to reflect UAD 3.6 inputs.
- ☐ Ensure your LOS is ready to support UAD 3.6 — from supporting the new UAD 3.6 order fields at the time of ordering to ingesting ZIP files and the new appraisal data fields on completion.
- ☐ Require the original URAR's UCDP ID on any Update or Completion order so submissions associate correctly.

Appraiser Engagement Letters

- ☐ Replace "deliver a 1004" language with clear scope and data requirements aligned to UAD 3.6.
- ☐ Specify property characteristics to be captured in structured fields, sketch and floor plan expectations, and any condo or multiunit elements that trigger conditional sections.
- ☐ Call out absolute use of Condition and Quality definitions and require narrative consistency with the selected ratings.
- ☐ Include the original URAR UCDP ID for Update and Completion assignments and state the expectation to associate the new report to the original.
- ☐ Confirm that your AMC partner or your Appraiser Panel is prepared to accept and process 3.6 orders.

Underwriting, Appraisal Review, and QC

- ☐ Retrain reviewers to navigate by URAR section labels and IDs, not page numbers.
- ☐ Update reviewer job aids to reflect the new placement of market analysis, comps, and time adjustments with commentary next to data.
- ☐ Ensure that you or your partner have tech in place to automatically review the new UAD 3.6 forms to assist underwriters.

UCDP and SSRs

- ☐ Test UCDP connectivity for UAD 3.6 files and have the integration in place with the new UCDP for UAD 3.6 files, confirm SSR retrieval and storage.
- ☐ Refresh internal cheat sheets with UAD 3.6 SSR message families, rule IDs, severities and common findings to speed conditions clearing.

Security and File Storage

- ☐ Work with partners that will handle and process the UAD 3.6 files in a secure manner to prevent malicious files.
- ☐ Ensure your systems are ready to handle larger file sizes as UAD 3.6 reports can exceed 50 MB in size.

Training and Change Management

- ☐ Hold quick hits for processors, underwriters, and secondary on what moved where in URAR.
- ☐ Provide an "ordering translation" one-pager that maps legacy phrasing to UAD 3.6 order inputs.
- ☐ Distribute a reviewer checklist tied to URAR sections and common SSR messages.
- ☐ Discuss readiness with all key appraisal vendors including AMCs, AMS, LOS, and order management platforms and keep your team in the loop on technology changes.
- ☐ Ensure your downstream integrations are equipped to support UAD 3.6 workflows.
- ☐ Consider running a pilot on a limited segment of appraisals and capture lessons learned for broader rollout.
- ☐ Run dual tracks during transition. Quarantine pipelines by standard and document channel cutover dates.