



Managing UAD 3.6 The Opteon Transition Model

Turning complexity into control

Introduction

THE CHALLENGE

UAD 3.6 represents a fundamental shift in how appraisal data is captured, validated, and delivered.

While much of the market is focused on understanding the change, the real challenge lies in managing the transition operationally across lenders, panels, and independent appraisers.

WHAT'S AT RISK

- Inconsistent panel performance
- Increased revision cycles
- Workflow disruption
- Turn time delays

THE SOLUTION

The Opteon UAD 3.6 Transition Model. A structured model to guide the ecosystem from understanding to execution.



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ADVANTAGE
STARTS WITH
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The Opteon UAD 3.6 Transition Model



Educate

Clarity before execution

We align lenders and appraisers with clear expectations, standards, and guidance.

Ensuring a shared understanding before execution begins.



Enable

Structure that reduces risk

We provide the systems, frameworks, and workflows needed to support UAD 3.6.

Reducing friction and improving consistency.



Execute

Performance through transition

We actively manage panel performance, risk, and outcomes.

Ensuring stability as the market transitions.



EDUCATE

Clarity before execution

01 | PANEL READINESS STANDARDS & CONSISTENCY

- Standardised expectations across panel appraisers
- Alignment on data definitions and reporting
- Structured onboarding criteria

Outcome: Reduced variability and more predictable performance



We align lenders and appraisers with clear expectations, standards, and guidance—ensuring a shared understanding before execution begins.

02 | LENDER READINESS SUPPORT

- Readiness checklists across teams
- Dual-track (2.6 + 3.6) education
- Workflow and system guidance

Outcome: Stronger internal alignment and reduced transition risk



Opteon has been partnering with lenders & appraisers to deliver 3.6 reports for months now. What we have learnt is irreplaceable.
Lee Trice, Managing Director

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ENABLE

Structure that reduces risk

01 | TECHNOLOGY-ENABLED COMPLIANCE & VALIDATION

- Built-in formatting and validation
- Pre-delivery QC checks
- Reduced submission failures

Outcome: Cleaner files and fewer late-stage revisions

02 | QC FRAMEWORKS & DATA STANDARDISATION

- Structured QC processes
- Standardised review frameworks
- Clear feedback loops

Outcome: Greater consistency and improved report quality

03 | DUAL-TRACK WORKFLOW SUPPORT

- Parallel 2.6 and 3.6 workflows
- Routing and assignment logic
- Review process alignment

Outcome: Minimal disruption during transition



We provide the systems, frameworks, and workflows needed to support UAD 3.6—reducing friction and improving consistency.

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EXECUTE

Performance through transition



01 | PANEL APPRAISER EDUCATION & SUPPORT

- Training resources
- Clear expectations
- Access to human support

Outcome: More confident appraisers and fewer revisions

02 | TURN TIME & FEE MANAGEMENT

- Benchmarking during transition
- Transparent fee discussions
- SLA alignment

Outcome: Sustainable performance without quality loss

03 | RISK & CHANGE MANAGEMENT

- Monitoring failure points
- Feedback loops to lenders
- Adaptive guidance

Outcome: Controlled transition with reduced risk



We actively manage panel performance, risk, and outcomes. Ensuring stability as the market transitions.

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Connecting the 3.6 Ecosystem

Transition Model



Educate
Enable
Execute

AMC & Panel



Scalable Coverage
Efficient Assignment
Managed Performance

**YOUR
BUSINESS
3.6 READY**

Support Model

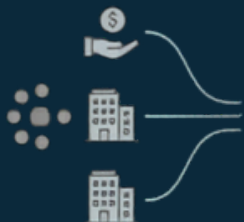


Client Rel Mgr
Single point escalation
Proactive Reporting

Leading Technology



Real-Time Visibility
Intelligent Workflows
AI Quality Control



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WHAT THIS MEANS FOR LENDERS?

- Greater panel control
- Reduced revision cycles
- Stable turnaround times

WHAT THIS MEANS FOR APPRAISERS?

- Clear expectations
- Reduced friction
- Improved efficiency

UAD 3.6 REQUIRES A RELIABLE MODEL FOR EXECUTION.

We are here to support you every step of the way.

Opteon, Where Value Means More.





Visit our website to sign up and talk to one of our transition experts.

[OPTEONUSA.COM](https://www.optheonusa.com)

