



# UAD 3.6 Lender Panel Readiness Checklist

## SECTION 1: SYSTEMS & TECHNOLOGY

- LOS / appraisal ordering system supports UAD 3.6
- Ability to manage dual formats (2.6 + 3.6)
- XML data ingestion and validation capabilities
- Integration with AMCs/vendors confirmed
- Testing environment established
- Data mapping reviewed and validated

## SECTION 3: DUAL DELIVERY

- Dual-track workflow documented:
  - Order routing
  - Assignment logic
  - Review process
- Exception handling defined
- Escalation pathways established
- Turn time expectations adjusted
- Volume allocation strategy updated

## SECTION 5: INTERNAL READINESS

- Underwriters trained on new outputs
- Operations teams trained on workflow changes
- Vendor management aligned on expectations
- Internal documentation updated
- Stakeholder communication plan executed

## SECTION 2: PANEL & VENDOR READINESS

- Panel segmented into:
  - Ready
  - At Risk
  - Not Ready
- Key AMCs aligned on transition timelines
- Independent appraiser readiness assessed
- Vendor communication plan in place
- Alternative vendors identified (if required)
- Performance expectations reset for transition period

## SECTION 4: QUALITY CONTROL (QC)

- QC framework updated for structured data
- Review checklists aligned to UAD 3.6 fields
- Validation rules defined
- Reviewer training completed
- Feedback loops established with vendors

## SECTION 6: RISK MANAGEMENT

- Revision risk assessed and mitigation plan in place
- Turnaround time impact modelled
- Contingency plans defined
- Early monitoring metrics established

**TALK TO US TODAY ABOUT SUPPORTING YOUR  
UAD 3.6 TESTING & TRANSITION**

**YOUR UAD 3.6 ADVANTAGE  
STARTS WITH OPTEON**  
NOW DELIVERING LIVE UAD 3.6 FILES.

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# UAD 3.6



# Panel Appraiser Checklist

## UNDERSTAND THE FRAMEWORK

- Review the [UAD 3.6 Overview & Documentation](#)
- Study the [Industry Guide to the New URAR](#)
- Explore Freddie Mac's [UAD 3.6 Training Portal](#)

## UPDATE YOUR TOOLS & SOFTWARE

- Confirm your appraisal software supports UAD 3.6 XML format.
- If using ACI, explore [ACI Workbench](#) for dynamic data entry and compliance.
- Review ValueLink's [UAD 3.6 Rollout Guide](#)

## COMPLETE TRAINING & EDUCATION

- Confirm your appraisal software supports UAD 3.6 XML format.
- If using ACI, explore [ACI Workbench](#) for dynamic data entry and compliance.
- Review ValueLink's [UAD 3.6 Rollout Guide](#)

## PRACTICE WITH SAMPLE REPORTS

- Download and review [Sample Scenarios & XML Files](#)
- Validate your reports using your software's UAD 3.6 compliance tools.

## COMMUNICATE WITH CLIENTS & AMCS

- Coordinate with AMCs on delivery formats and expectations
- Notify clients of your readiness and timeline.
  1. Limited Production: Starts September 8, 2025
  2. Broad Production: Opens January 26, 2026
  3. Mandatory Use: Begins November 2, 2026
  4. UAD 2.6 Retirement: Ends May 3, 2027

## DOCUMENT YOUR TRANSITION PLAN

- Create internal SOPs for UAD 3.6 workflows.
- Assign roles for quality control and compliance.
- Track progress and update procedures as needed.

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