



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.

**YOUR UAD 3.6 ADVANTAGE
STARTS WITH OPTEON**

GET IN TOUCH

833.740.2739

opteon@opteonusa.com

opteonusa.com