PUBLIC MEETING OF THE NEBRASKA REAL PROPERTY APPRAISER BOARD
Thursday, June 20, 2024, 9:00 a.m.
Nebraska Real Property Appraiser Board Office, First Floor, Nebraska State Office Building
301 Centennial Mall South, Lincoln, Nebraska

AGENDA

A. Opening 9:00 a.m.

B. Notice of Meeting (Adopt Agenda)

The Nebraska Real Property Appraiser Board will meet in executive session for the purpose of reviewing applicants for credentialing; applicants for appraisal management company registration; investigations; pending litigation, or litigation that is imminent as evidenced by communication of a claim or threat of litigation; and employee performance evaluation. The Board will exit executive session at 10:00 a.m. If needed, the Board will re-enter executive session at the conclusion of the public agenda items discussion to complete review of the above-mentioned items. The Board will not take action on agenda items C, D, E, and F until executive session is completed.

C. Credentialing as a Nebraska Real Property Appraiser 1-10
1. New Applicants for Certified General Credential through Education, Experience, and Examination
   a. CG24001
2. Pending Applications
   a. CG23039
   b. CG24002

D. Registration as an Appraisal Management Company 1-17
1. Applicants for Renewal of Appraisal Management Company Registration
   a. NE2021004
   b. NE2012081
   c. NE2021002
   d. NE2018003

E. Compliance Matters 1-5
1. New Grievances
2. Active Investigations
   a. 23-08
   b. 23-12
3. Post-Board Action Matters
   a. 24-03

F. Other Executive Session Items
1. 2024.07 1-4
2. Personnel Matters

G. **Welcome and Chair's Remarks** *(Public Agenda 10:00 a.m.)*

H. NRPAB Employee Recognition Award

I. **Board Meeting Minutes**

J. **Director's Report**
1. Real Property Appraiser and AMC Counts and Trends
2. Director Approval of Applicants

K. **Financial Report and Considerations**
1. May Financial Report
3. Per Diems

L. **General Public Comments**

1. Application for Approval as Continuing Education
   a. 2243458.33: Appraiser eLearning – "Scan to Sketch – Practical Application of Mobile Appraising"

N. **Unfinished Business**

O. **New Business**

P. **Legislative Report and Business**
1. Other Legislative Matters

Q. **Administrative Business**
1. Guidance Documents
2. Internal Procedural Documents
3. Forms, Applications, and Procedures

R. Other Business
1. Board Meetings
2. Conferences/Education
3. Memos from the Board
4. Quarterly Newsletter
5. Appraisal Subcommittee
6. The Appraisal Foundation
7. Association of Appraiser Regulatory Officials
8. In the News

S. Adjourn

NEBRASKA REAL PROPERTY APPRAISER BOARD
NRPAB OFFICE MEETING ROOM, FIRST FLOOR
NEBRASKA STATE OFFICE BUILDING
301 CENTENNIAL MALL SOUTH, LINCOLN, NE

May 16, 2024 Meeting Minutes

A. **OPENING**
Chairperson Downing called to order the May 16, 2024 meeting of the Nebraska Real Property Appraiser Board at 9:00 a.m. in the Nebraska Real Property Appraiser Board meeting room located on the first floor of the Nebraska State Office Building, 301 Centennial Mall South, Lincoln, Nebraska.

B. **NOTICE OF MEETING**
Chairperson Downing announced the notice of the meeting was duly given, posted, published, and tendered in compliance with the Open Meetings Act, and all board members received notice simultaneously by email. Publication of official notice of the meeting appeared on the State of Nebraska Public Calendar found at www.nebraska.gov on May 9, 2024. The agenda was kept current in the Nebraska Real Property Appraiser Board office and on the Board's website. In accordance with the Open Meetings Act, at least one copy of all reproducible written material for this meeting, either in paper or electronic form, was available for examination and copying by members of the public. The material in paper form was available on the table in a public folder, and the material in electronic form was available on the Board's website in Public Meeting Material (https://appraiser.ne.gov/board_meetings/). A copy of the Open Meetings Act was available for the duration of the meeting. For the record Bonnie Downing of Dunning, Nebraska, Cody Gerdes of Lincoln, Nebraska, Kevin Hermsen of Gretna, Nebraska, Rodney Johnson of Norfolk, Nebraska, and Derek Minshull of North Platte, Nebraska were present. Also present were Director Tyler Kohtz, Business Programs Manager Karen Loll, Licensing Programs Manager Allison Nespor, and Education Program Manager Kashinda Sims, who are headquartered in Lincoln, Nebraska.

ADOPTION OF THE AGENDA
Chairperson Downing reminded those present for the meeting that the agenda cannot be altered twenty-four hours prior to the meeting except for emergency items according to the Open Meetings Act. Board Member Minshull moved to adopt the agenda as printed. Board Member Gerdes seconded the motion. With no further discussion, the motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

Board Member Gerdes moved that the Board go into executive session for the purpose of reviewing applicants for credentialing; applicants for appraisal management company registration; investigations; pending litigation, or litigation which is imminent as evidenced by communication of a claim or threat of litigation; and employee performance evaluation. A closed session is clearly necessary to prevent needless injury to the reputation of those involved. Board Member Minshull seconded the motion. The time on the meeting clock was 9:03 a.m. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

Brian Morrissey appeared before the Board from 9:15 a.m. to 9:28 a.m.

Board Member Johnson exited the meeting at 9:30 a.m.

Board Member Johnson returned to the meeting at 9:31 a.m.

Break from 10:28 a.m. to 10:40 a.m.

Board Member Minshull moved to come out of executive session at 11:37 a.m. Board Member Hermsen seconded the motion. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

G. WELCOME AND CHAIR'S REMARKS
Chairperson Downing welcomed all to the May 16, 2024 meeting of the Nebraska Real Property Appraiser Board. The Chairperson recognized Roger Morrissey as the only member of the public in attendance.

H. BOARD MEETING MINUTES
1. APPROVAL OF APRIL 18, 2024 MEETING MINUTES
Chairperson Downing asked for any additions or corrections to the April 18, 2024 meeting minutes. With no discussion, Board Member Downing called for a motion. Board Member Johnson moved to approve the April 18, 2024 meeting minutes as presented. Board Member Minshull seconded the motion. Chairperson Downing recognized the motion and asked for any discussion. With no discussion, Chairperson Downing called for a vote. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

I. DIRECTOR'S REPORT
1. REAL PROPERTY APPRAISER AND AMC COUNTS AND TRENDS
a. Real Property Appraiser Report
Director Kohtz presented seven charts outlining the number of real property appraisers as of May 16, 2024 to the Board for review. The Director reported that trends were stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

b. Temporary Real Property Appraiser Report
Director Kohtz presented three charts outlining the number of temporary credentials issued as of April 30, 2024 to the Board for review. The Director reported that trends were stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

c. Supervisory Real Property Appraiser Report
Director Kohtz presented two charts outlining the number of supervisory real property appraisers as of May 16, 2024 to the Board for review. The Director reported that trends were stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

d. Appraisal Management Company Report

Director Kohtz presented two charts outlining the number of AMCs as of May 16, 2024 to the Board for review. The Director reported that trends were stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

2. DIRECTOR APPROVAL OF APPLICANTS

a. Education Activity and Instructors Report

Director Kohtz presented the Education Activities and Instructors Report to the Board for review showing education activities and instructors approved by the Director for the period between April 10, 2024 and May 7, 2024. The Director asked for any questions or comments. There was no further discussion.

3. 2023-24 NRPAB GOALS AND OBJECTIVES + SWOT ANALYSIS

Director Kohtz presented the 2023-2024 NRPAB Goals and Objectives and SWOT Analysis to the Board for review and reported that he had no update this month. There was no further discussion.

J. FINANCIAL REPORT AND CONSIDERATIONS

1. APPROVAL OF APRIL RECEIPTS AND EXPENDITURES

The receipts and expenditures for April were presented to the Board for review in the Budget Status Report. Director Kohtz brought attention to the Other Operating Expense in the amount of $40.00 and reported that this expenditure pertains to payments made to the State Treasurer's Office for two ACH returns for insufficient funds; each charge is $20.00. The Director remarked that this cost is recouped when the new payment is received. The Director then indicated that the expenditures for the month of April totaled $29,518.68, and the year-to-date expenditures for the fiscal year are $305,967.08, which amounts to 67.36 percent of the budgeted expenditures for the fiscal year; 83.56 percent of the fiscal year has passed. Director Kohtz noted that the expenses were low for this point in the year.

Director Kohtz next turned the Board's attention to revenues and indicated that he had no specific comments pertaining to any individual account code. The Director informed the Board that revenues for the month of April were $14,600.10, and that the year-to-date revenues for the fiscal year are $327,276.90, which amounts to 89.52 percent of the projected revenues for the fiscal year. Director Kohtz reiterated that 83.56 percent of the fiscal year has passed. The Director asked for any questions or comments. Board Member Minshull inquired as to the nature of the investment income sources. Director Kohtz reported that State Treasury is responsible for investing the state funds and that he is unaware of where or how the funds are being invested. The Director added that he could obtain this information if the Board is interested. Board Member Minshull indicated that it would not be necessary.

Director Kohtz then guided the Board to the MTD General Ledger Detail report for the month of April and brought attention to Batch #7444928 with the Payee/Explanation, "Treasurer, State" found on page J.7 for $40.00. The Director reported that this payment was for two ACH returns for insufficient funds.

Director Kohtz presented four graphs showing expenses, revenues, and cash balances. The Director noted expenditures of $29,518.68 and revenues of $14,600.10 for the month of April for the Real Property Appraiser program, which includes both the Appraiser Fund and the AMC Fund. The Director reported that the Real Property Appraiser Fund expenditures totaled $19,566.50, the Real Property Appraiser Fund revenues totaled $4,770.11, the AMC Fund expenditures totaled $9,952.18, and the AMC Fund revenues totaled $9,829.99. Director Kohtz remarked that the cash balance for the AMC Fund is $328,362.80, the Appraiser Fund is $433,611.29, and the overall cash balance for both funds is $761,974.09. The Director asked for any questions or comments. There was no further discussion.

Board Member Johnson moved to accept and file the April financial reports for audit. Board Member Minshull seconded the motion. Chairperson Downing recognized the motion and asked for any discussion. With no discussion, Chairperson Downing called for a vote. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

2. PER DIEMS

Director Kohtz informed the Board that he had no per diem requests for this meeting and asked if any board members had a request for the Board to consider. There was no further discussion.

K. GENERAL PUBLIC COMMENTS

Chairperson Downing asked for any public comments. With no comments, Chairperson Downing moved on to Education.

L. EDUCATION

1. Rescission of Approval of Education Activities

a. 2191453.02: Appraisal Institute – Litigation Appraising: Specialized Topics and Applications

EPM Sims presented a summary to the Board concerning the Appraisal Institute activity titled "Litigation Appraising: Specialized Topics and Applications." The education provider indicated that the activity should have been approved as qualifying education and has requested that approval as a continuing education activity be rescinded. The activity, which was approved on July 18, 2019, is currently set to expire on July 18, 2024.

Public Member Roger Morrissey requested permission to address the Board. Chairperson Downing granted permission to Morrissey to speak. Morrissey inquired if this activity would be approved after July. EPM Sims responded that the rescission would be effective today. Director Kohtz stated that the provider would have to apply for the activity to be approved in the future. Morrissey expressed interest in completing the activity if it is approved again in the future.

I.4

Board Member Gerdes moved to rescind approval for the education activity titled, "Litigation Appraising: Specialized Topics and Applications" " (2191453.02) as requested by the education provider. Board Member Minshull seconded the motion. Chairperson Downing recognized the motion and asked for any discussion. With no further discussion, Chairperson Downing called for a vote. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.

M. UNFINISHED BUSINESS: No discussion

N. NEW BUSINESS: No discussion

O. LEGISLATIVE REPORT AND BUSINESS: No discussion.

P. ADMINISTRATIVE BUSINESS: No discussion.

Q. OTHER BUSINESS
   1. BOARD MEETINGS: No discussion.

   2. CONFERENCES/EDUCATION:
     a. Kohtz Spring AARO Conference Report
     Director Kohtz reported that he attended the 2024 Spring AARO Conference May 3-5, 2024 in Nashville, TN. The Director provided a detailed summary of the conference for the board members to review, and noted the following highlights:

- Jim Park, Executive Director for ASC, provided the ASC Update. A summary of the regulatory structure and the ASC's place in the regulatory structure, along with an overview of the ASC's mission and responsibilities was provided. In 2024, Appraiser and AMC program compliance reviews were completed in fourteen states and 37 state programs are in process. The ASC is working on State Enforcement Rulemaking. Dodd-Frank gave the ASC enforcement authority to use in advance of or to avoid derecognition, including suspensions, removal of appraisers or AMCs from National Registries. The ASC also continues to focus on appraisal bias and lack of diversity in the profession. A summary of the Appraiser Registry was provided, which shows a slow increase for the certified general classification and a slow decrease for the certified residential classification; the licensed residential classification is stable. Overall, the number of appraisers is steady. Diversity within the industry is improving. In 2020, 97.5% of appraisers were white and 70% were male, and in 2022, 92.4% of appraisers were white and 55.5% were male. The FHFA Blog also shows bias improvement through the UAD statistics. The ASC Grants Program was also discussed; the ASC has an approved budget of $2,025,000 for FY24. Federal Legislation identified during the ASC Update includes the PAL Act and Appraisal Improvement Act. Park finished by describing recent ASC staffing changes, including new staff: Kelly Luteijn, Jonny Stewart, and John Brenan.

- Kelly Davids of The Appraisal Foundation provided a brief summary of the AARO-ASC-TAF Partnership. Davids identified the following as important for building for the future and building public trust:
  - 40 listening sessions completed and 50 to go; including 6 of 7 ASC agencies.
  - Outreach includes White House, Capitol Hill, speaking events, and interviews.
  - Themes emerging include more collaboration and less divisiveness, building the next generation, and bringing folks together to tackle current and emerging issues.
  - Partners have replaced sponsors at TAF.
  - BOT governance changes have been implemented.

  Finally, TAF resources were discussed including newsletter, podcast, and website documents.

- The Appraisal Standards Board adopted the 2024 USPAP on May 5, 2023. The 7-Hour National USPAP course was updated to include anti-discrimination content and more interaction. Recently released Q&As were summarized. Finally, the ASB is working on consideration of Advisory Opinions.

- Appraiser Qualifications Board provided a summary of the AQB's authority and function, the 2026 Criteria, and the AQB Approved Degree Program. The AQB also provided an overview of PAREA. AQB is currently reassessing the Real Property Appraiser Qualifications Criteria and is working on a research paper.

- Lyle Radke of Fannie Mae provided the Fannie Mae Update. The Appraiser Quality Monitoring (AQM) program was summarized and statistics provided showing that States Tips and Referrals are increasing from year to year. The common issues Fannie Mae sees in appraisals were summarized. Reconsideration of Value (ROV) was published May 1, 2024 and will be implemented on August 29, 2024. The three pillars include Lender Responsibilities, Borrower Rights and Responsibilities, and Appraiser Rights and Responsibilities. Appraisers must provide a revised appraisal within the defined term.

- Danny Wiley of Freddie Mac provided the Freddie Mac Update. Freddie Mac is focused on greater appraiser accountability. Specifically, text detection is being used to discover unsuitable words and phrases, Loan Collateral Advisor warnings, and hard stops. The trigger rate for subjective words has decreased from 7.76% to 3.62% and trigger rate for unsuitable words has decreased from 6.02% to 0.10% in six months. Freddie Mac's Market Condition Analysis was also discussed. Unacceptable appraisal practices include the use of inordinate adjustments for differences between the subject property and comparable sales that do not reflect the market's reaction to such differences, and the failure to make proper adjustments when they are clearly necessary. It was noted during the presentation that desktop appraisals and waivers are a very small percentage Freddie Mac's volume. Tools and Technology and Buydowns and Seller Concessions were also covered. Wiley closed the Freddie Mac Update by expressing dissatisfaction with states complaint submission processes.

- The Executive Directors and Administrators Roundtable included several topics. Implementation of the 2026 Criteria, complaints by non-intended users, the adoption of PAREA and implementing practicum courses, the licensing of data collectors in each state, and active bias and discrimination cases were all discussed.

- Regeane Frederique, ASC Grants Director, gave a presentation on the ASC Grants Program. The current funding available to states, types of projects, SARAS grants, and how to apply were all covered. As part of the ASC Grants Program presentation, Erin Dixon from the State of Illinois discussed how the Illinois Division of Real Estate applied for the ASC grant and became one of the first states to be awarded this grant.

- "Regulator Dos and Don'ts" offered relevant information in an entertaining gameshow format.

- A presentation was given on the fair housing course implementation and understanding the role of the consumer in the regulatory system. The Appraisal Foundation provided an overview of requirements for, and the content of, the Valuation Bias and Fair Housing Laws and Regulations course. Karen Freeman-Olson, President and CIO of the Chicago Urban League, gave a presentation on the mission of the Council to Advance Residential Equity (CARE) and the role of regulators in fair housing. David Young, Director of Capacity Building for the Housing Action in Illinois, also brought attention to consumer benefits and protections.

- A presentation by Jose Jimenez was given on the impact of technology and AI.

- The final presentation, "Top Ten USPAP Conundrums," was given by Lisa Desmaris and Michelle Czekalski-Bradley of The Appraisal Foundation and Julie Molendorp-Floyd of McKissock.

Board Member Minshull brought attention to the final bullet point regarding this presentation, "Rudeness or lateness is not a USPAP violation," and commented on the importance of keeping this in mind.

The Director concluded the summary of the conference and asked the Board for any questions or comments. Board Member Minshull inquired about the typical attendee at the conference. Director Kohtz responded that most attendees were staff from state appraiser regulatory agencies, others were board members, AMC representatives and other industry persons. There was no further discussion.

3. **MEMOS FROM THE BOARD:** No discussion.

4. **QUARTERLY NEWSLETTER:** No discussion.

5. **APPRAISAL SUBCOMMITTEE:** No discussion.

6. **THE APPRAISAL FOUNDATION**
   a. **TAF May Newsletter**
   Director Kohtz presented The Appraisal Foundation's May Newsletter to the Board for review and brought attention to "Upzoning Q&As" found on page Q.10. The Director indicated that he had questions regarding the Upzoning Q&As, which is why they were not included on the May agenda. Director Kohtz reported that he would present the Q&As to the Board after receiving a response to his inquiry from ASC Policy Manager Jonny Stewart. The Director asked for any questions or comments. There was no discussion.

   b. **TAF State Regulator Newsletter**
   Director Kohtz presented The Appraisal Foundation's State Regulator Newsletter to the Board for review and reported that he had no specific comments. The Director asked for any questions or comments. There was no discussion.

7. **ASSOCIATION OF APPRAISER REGULATORY OFFICIALS:** No discussion.

8. **IN THE NEWS:** No discussion.

C. Credentialing as a Nebraska Real Property Appraiser:
The Board reviewed applicants L24001, CG23033, CG24002 and CG22852T. Chairperson Downing asked for motions on L24001, CG23033, CG24002 and CG22852T.

Board Member Gerdes moved to take the following action:

> **L24001 / Provide applicant with redacted copies of USPAP Compliance Review Reports and request that applicant develop a report for a non-traditional client on a single-family property that demonstrates competency in USPAP.**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

> **CG23033 / Provide applicant with a redacted copy of the USPAP Compliance Review Report pertaining to the report for the property located in Fillmore County, Nebraska and approve applicant to sit for exam, and authorized Director Kohtz to issue a credential as a certified general real property appraiser upon providing evidence of successful completion of the National Uniform Licensing and Certification Examination and providing the necessary fees.**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

> **CG24002 / The applicant's request for the Board to amend its April 18, 2024 action pertaining to the application is under consideration. Send the Seward County, Nebraska report for USPAP compliance review.**

Board Member Minshull seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

> **CG22852T** / **Deny the Application for Renewal of Nebraska Real Property Appraiser Temporary Credential for failure to meet the requirement of Neb. Rev. Stat. § 76-2233.01(5) in accordance with 298 NAC Chapter 3, § 002.06.**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

D. Registration as an Appraisal Management Company: No discussion

E. Consideration of Compliance Matters
The Board reviewed compliance matters 23-01, 23-08, 23-12, 24-02, 24-03, and 24-04. Chairperson Downing asked for a motion on 23-12, 24-02, 24-03, and 24-04.

Board Member Gerdes moved to take the following action:

> **24-02** / **Dismiss with prejudice.**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

> **24-03** / **Dismiss without prejudice. Provide report to the Nebraska Real Estate Commission for consideration of any violations of the Real Estate Licensing Act.**

Board Member Minshull seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

> **24-04** / **Close.**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting aye.

Board Member Gerdes moved to take the following action:

**23-12 / Proceed with investigation for the alleged violations of Neb. Rev. Stat.
§ 76-2217.03, N.R.S. § 76-2237, and N.R.S. § 76-2238 (12), (14), and
(19).**

Board Member Hermsen seconded the motion. Chairperson Downing recognized the motion and
called for a vote. Motion carried with Gerdes, Hermsen, Johnson, Minshull and Downing voting
aye.

F. Consideration of Other Executive Session Items
   1. 2024.07
      The Board reviewed 2024.07 and took no action as the education provider is working to
      resolve this matter. The Board will discuss this matter again at its June 20, 2024 meeting.

   2. 2024.10
      The Board reviewed an anonymous tip pertaining to a "Report of Appraisers" in a case before
      County Court of Butler County, Nebraska. No action was taken by the Board.

   3. Personnel Matters
      a. Director's Performance Review Discussion
         The Board discussed personnel matters. Board Member Gerdes moved to increase the
         Director's salary by 10.0% for FY 2024-25, effective July 1, 2024. Board Member Hermsen
         seconded the motion. Motion carried with Gerdes, Hermsen, Johnson, Minshull and
         Downing voting aye.

R. ADJOURNMENT
Board Member Minshull moved to adjourn the meeting. Board Member Hermsen seconded the
motion. The motion carried with Gerdes, Hermsen, Johnson, Minshull, and Downing voting aye.
At 12:09 p.m., Chairperson Downing adjourned the May 16, 2024 meeting of the Nebraska Real
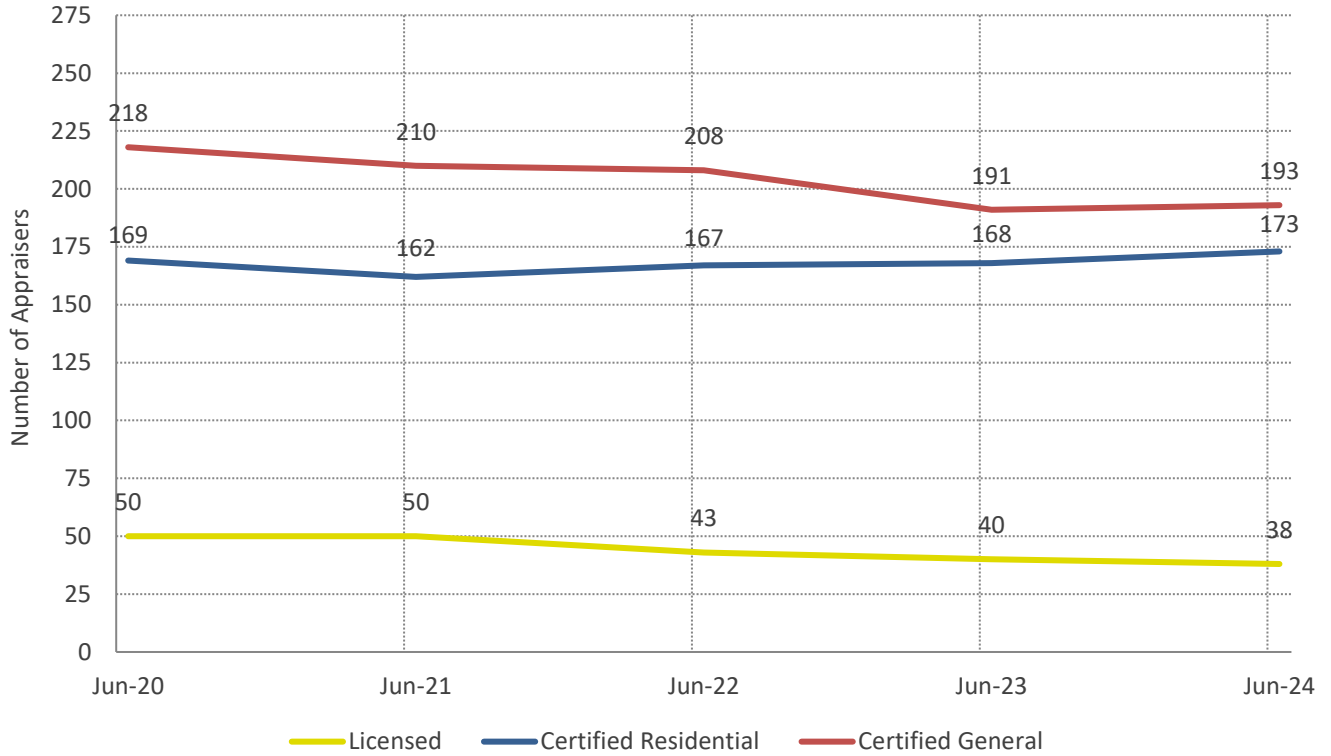Property Appraiser Board.

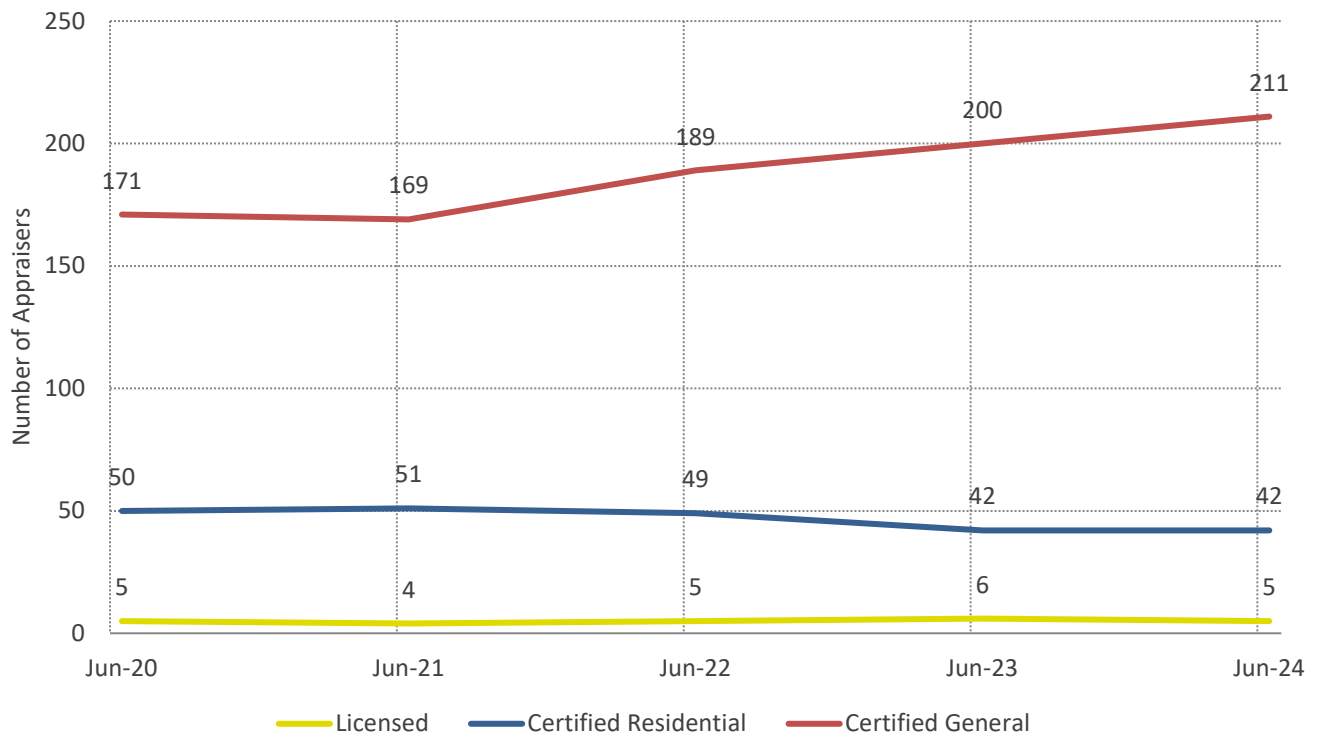Respectfully submitted,

Tyler N. Kohtz
Director

These minutes were available for public inspection on May 30, 2024, in compliance with Nebraska
Revised Statute § 84-1413 (5).
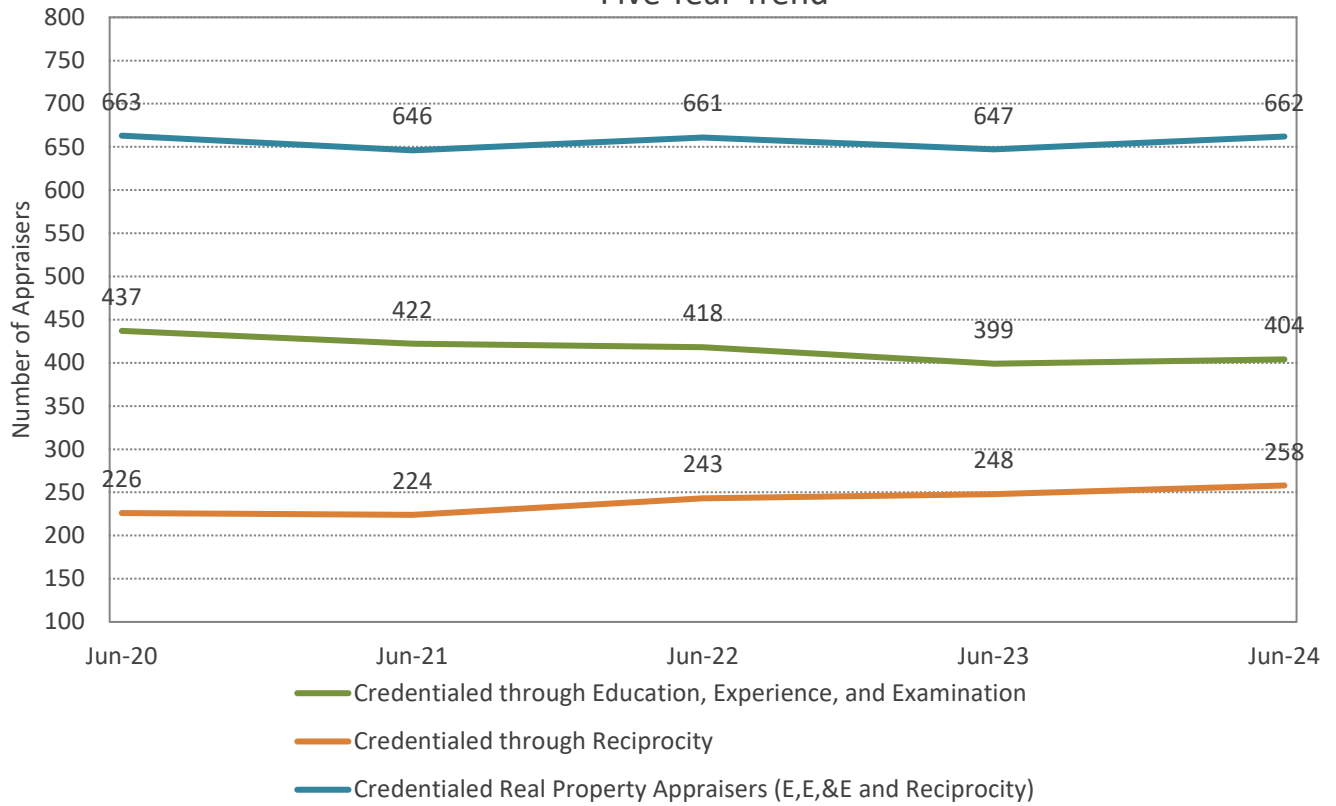
Real Property Appraiser Report

Real Property Appraisers Credentialed through Education, Experience, and Examination (not including Trainee) - Five Year Trend
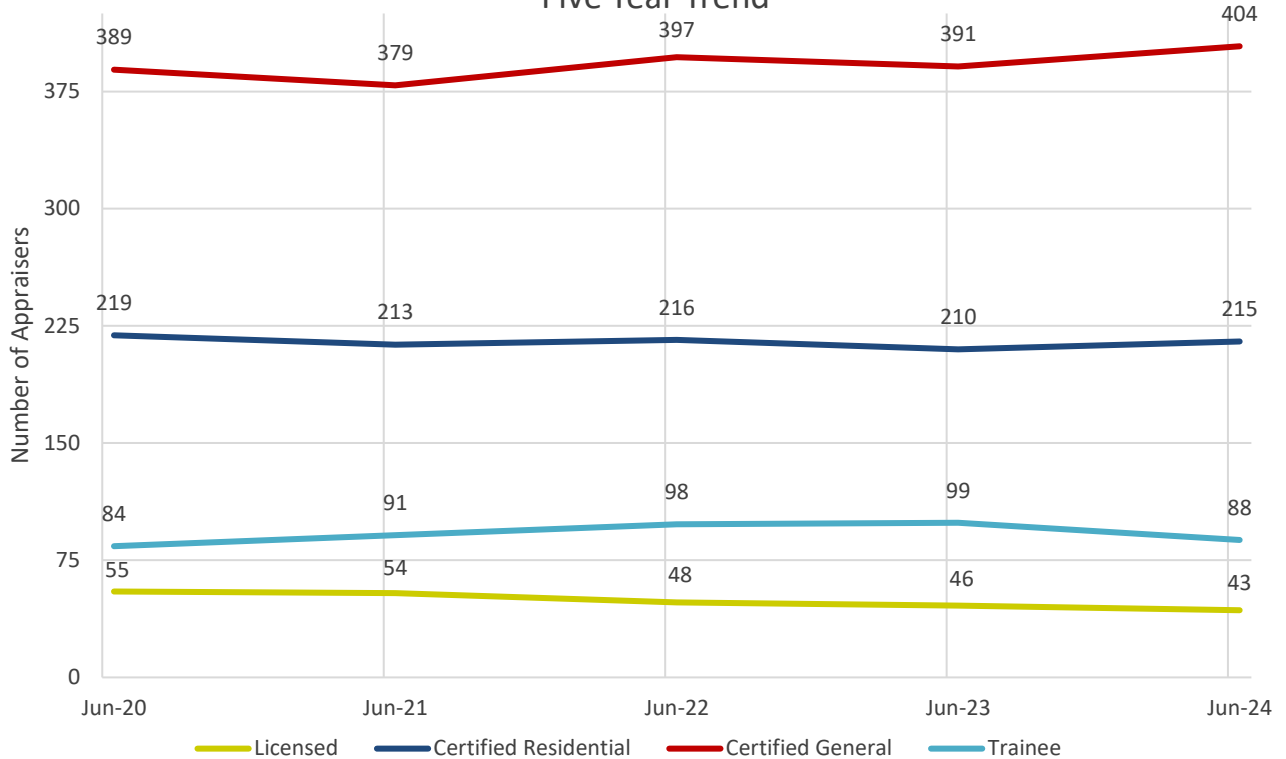
Number of Appraisers

Certified General (red line):
- Jun-20: 218
- Jun-21: 210
- Jun-22: 208
- Jun-23: 191
- Jun-24: 193

Certified Residential (blue line):
- Jun-20: 169
- Jun-21: 162
- Jun-22: 167
- Jun-23: 168
- Jun-24: 173

Licensed (yellow line):
- Jun-20: 50
- Jun-21: 50
- Jun-22: 43
- Jun-23: 40
- Jun-24: 38

Legend: Licensed — Certified Residential — Certified General

Real Property Appraisers by Classification Credentialed through Reciprocity - Five Year Trend

Number of Appraisers

Certified General (red line):
- Jun-20: 171
- Jun-21: 169
- Jun-22: 189
- Jun-23: 200
- Jun-24: 211

Certified Residential (blue line):
- Jun-20: 50
- Jun-21: 51
- Jun-22: 49
- Jun-23: 42
- Jun-24: 42

Licensed (yellow line):
- Jun-20: 5
- Jun-21: 4
- Jun-22: 5
- Jun-23: 6
- Jun-24: 5

Legend: Licensed — Certified Residential — Certified General

J.1

Total Real Property Appraisers (not including Trainee) - Five Year Trend

Number of Appraisers

	Jun-20	Jun-21	Jun-22	Jun-23	Jun-24
Credentialed Real Property Appraisers (E,E,&E and Reciprocity)	663	646	661	647	662
Credentialed through Education, Experience, and Examination	437	422	418	399	404
Credentialed through Reciprocity	226	224	243	248	258

— Credentialed through Education, Experience, and Examination
— Credentialed through Reciprocity
— Credentialed Real Property Appraisers (E,E,&E and Reciprocity)

Total Real Property Appraisers by Classification - Five Year Trend

Number of Appraisers

	Jun-20	Jun-21	Jun-22	Jun-23	Jun-24
Certified General	389	379	397	391	404
Certified Residential	219	213	216	210	215
Trainee	84	91	98	99	88
Licensed	55	54	48	46	43

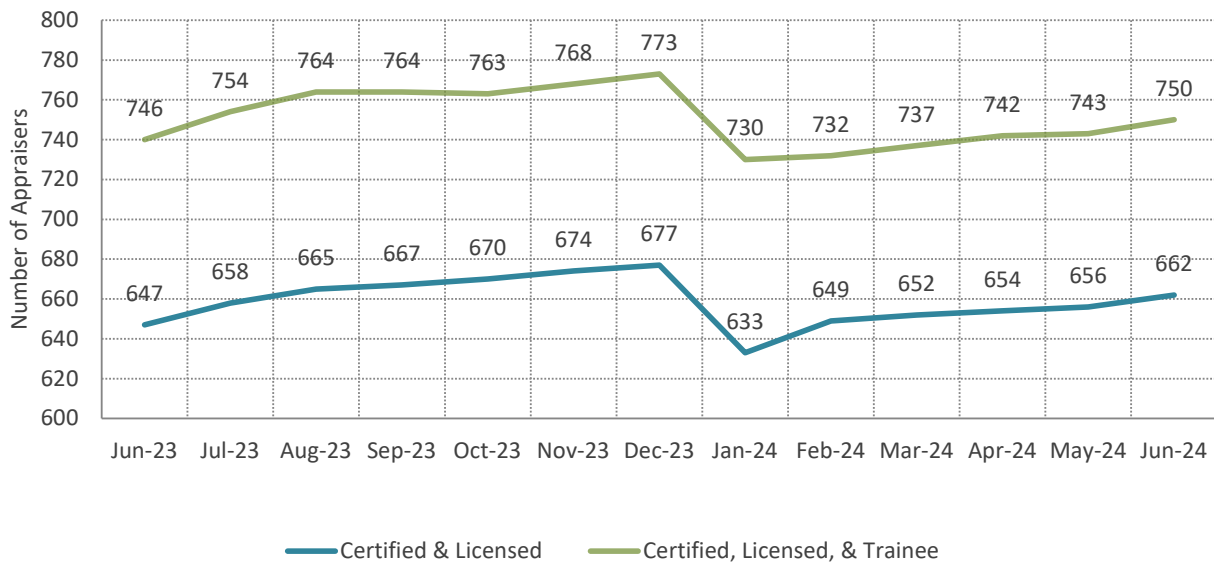— Licensed   — Certified Residential   — Certified General   — Trainee

J.2

Total Real Property Appraisers - Five Year Trend
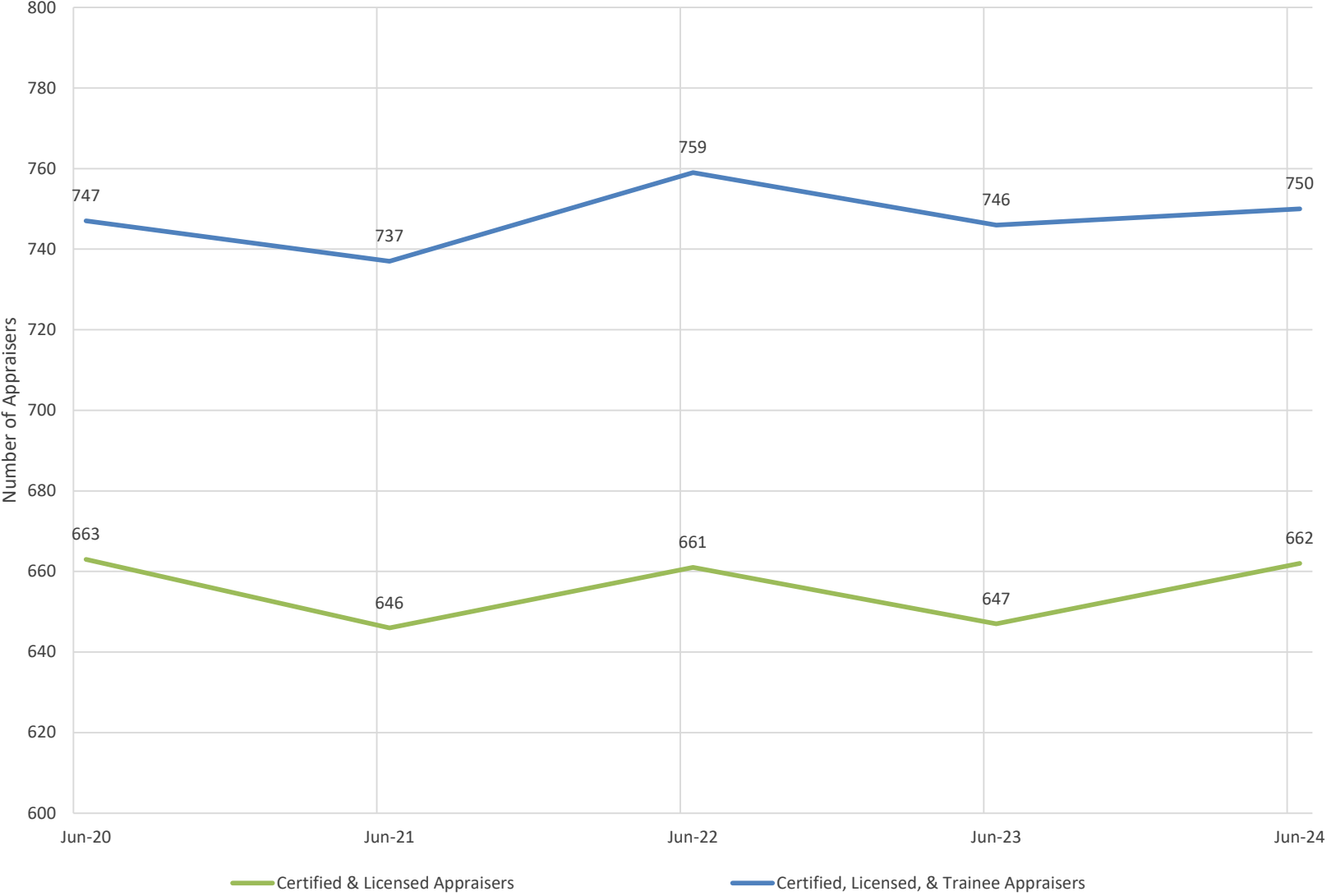
Real Property Appraisers by Classification - Thirteen Month Trend

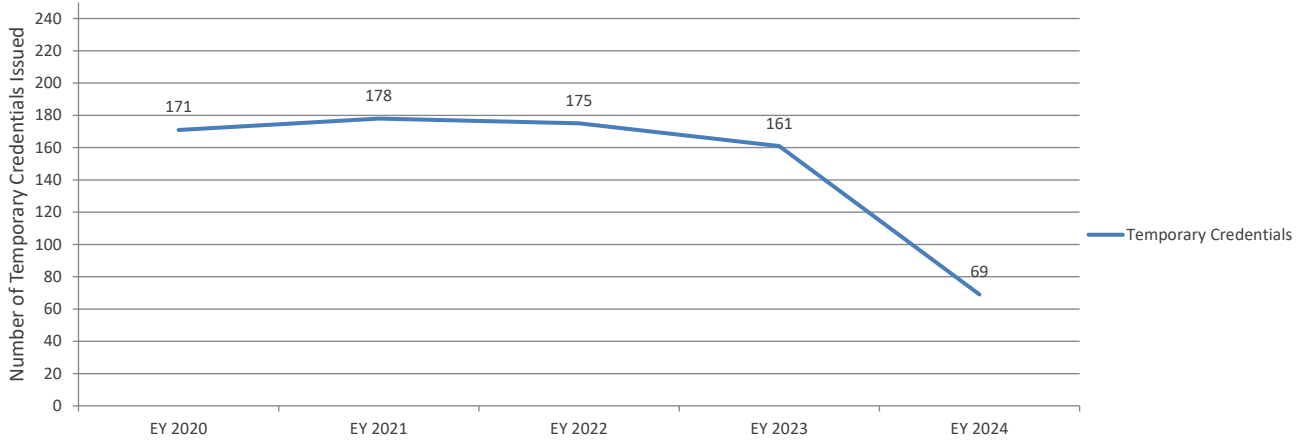**Certified General:** Jun-23: 391, Jul-23: 398, Aug-23: 404, Sep-23: 406, Oct-23: 408, Nov-23: 411, Dec-23: 414, Jan-24: 378, Feb-24: 394, Mar-24: 396, Apr-24: 398, May-24: 398, Jun-24: 404

Certified Residential: Jun-23: 210, Jul-23: 215, Aug-23: 216, Sep-23: 216, Oct-23: 217, Nov-23: 218, Dec-23: 218, Jan-24: 212, Feb-24: 212, Mar-24: 213, Apr-24: 213, May-24: 214, Jun-24: 215

Trainee: Jun-23: 93, Jul-23: 96, Aug-23: 99, Sep-23: 97, Oct-23: 93, Nov-23: 94, Dec-23: 96, Jan-24: 97, Feb-24: 83, Mar-24: 85, Apr-24: 88, May-24: 87, Jun-24: 88

Licensed: Jun-23: 46, Jul-23: 45, Aug-23: 45, Sep-23: 45, Oct-23: 45, Nov-23: 45, Dec-23: 45, Jan-24: 43, Feb-24: 43, Mar-24: 43, Apr-24: 43, May-24: 44, Jun-24: 43

Legend: Licensed, Certified Residential, Certified General, Trainee

Total Real Property Appraisers - Thirteen Month Trend

Certified, Licensed, & Trainee: Jun-23: 746, Jul-23: 754, Aug-23: 764, Sep-23: 764, Oct-23: 763, Nov-23: 768, Dec-23: 773, Jan-24: 730, Feb-24: 732, Mar-24: 737, Apr-24: 742, May-24: 743, Jun-24: 750

Certified & Licensed: Jun-23: 647, Jul-23: 658, Aug-23: 665, Sep-23: 667, Oct-23: 670, Nov-23: 674, Dec-23: 677, Jan-24: 633, Feb-24: 649, Mar-24: 652, Apr-24: 654, May-24: 656, Jun-24: 662

Legend: Certified & Licensed, Certified, Licensed, & Trainee

J.4

Temporary Real Property Appraiser Report

Temporary Real Property Appraiser Credentials Issued by Calendar Year - Five Year Trend

Number of Temporary Credentials Issued

EY 2020	EY 2021	EY 2022	EY 2023	EY 2024
171	178	175	161	69

— Temporary Credentials

Year-to-date Temporary Real Property Appraiser Credentials Issued - Five Year Trend

Number of Temporary Credentials Issued

May 2020	May 2021	May 2022	May 2023	May 2024
55	66	81	68	69

— Temporary Credentials
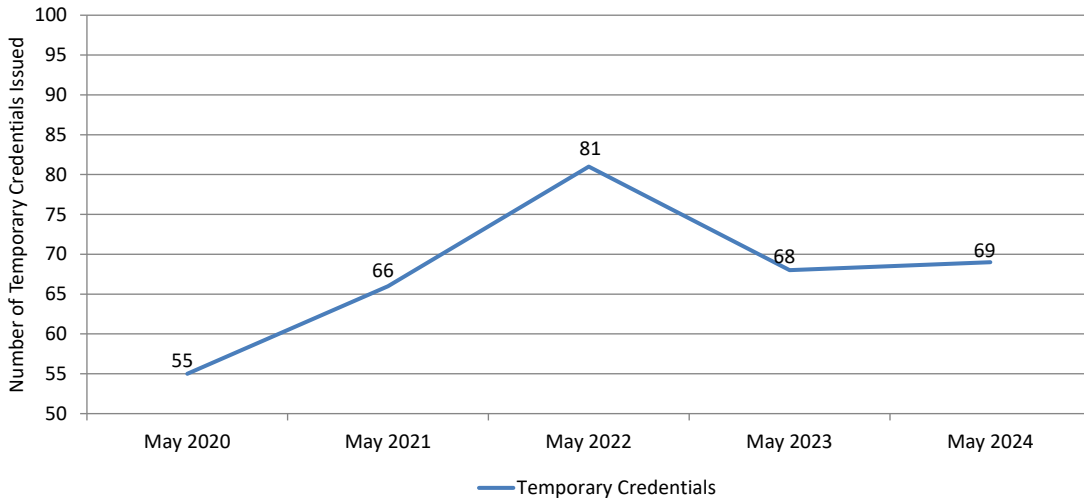
Temporary Real Property Appraiser Credentials Issued by Month - Twelve Month Trend

Number of Temporary Credentials Issued

Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24
10	16	14	15	10	11	17	14	11	11	16	17

— Temporary Credentials

J.5
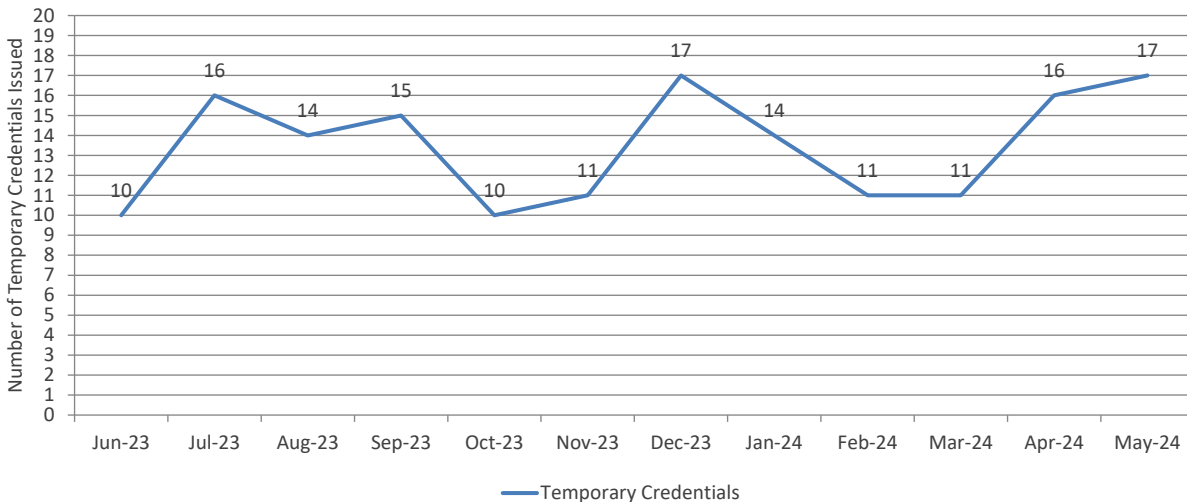
Supervisory Real Property Appraiser Report

Registered Supervisory Real Property Appraisers - Thirteen Month Trend
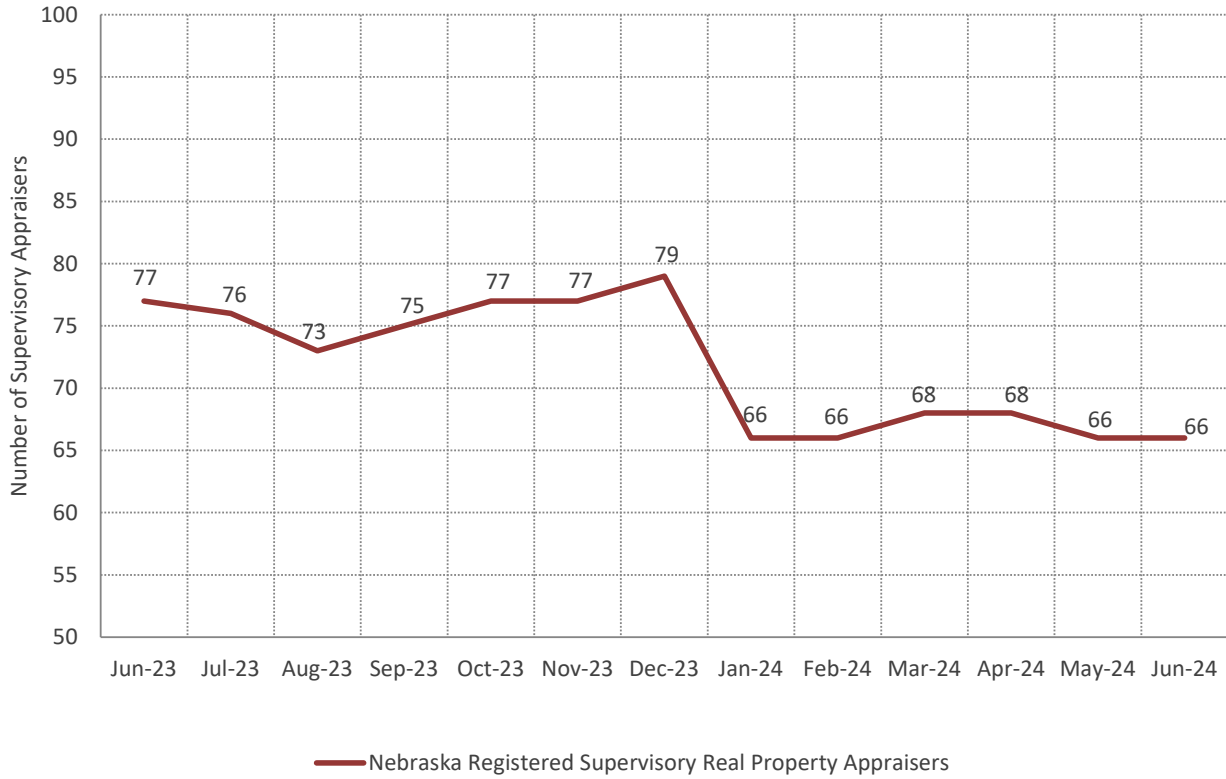
Number of Supervisory Appraisers

Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24
77	76	73	75	77	77	79	66	66	68	68	66	66

—— Nebraska Registered Supervisory Real Property Appraisers

Registered Supervisory Real Property Appraisers - Five Year Trend

Number of Supervisory Appraisers

June 2020	June 2021	June 2022	June 2023	June 2024
63	69	72	77	66

—— Nebraska Registered Supervisory Real Property Appraisers
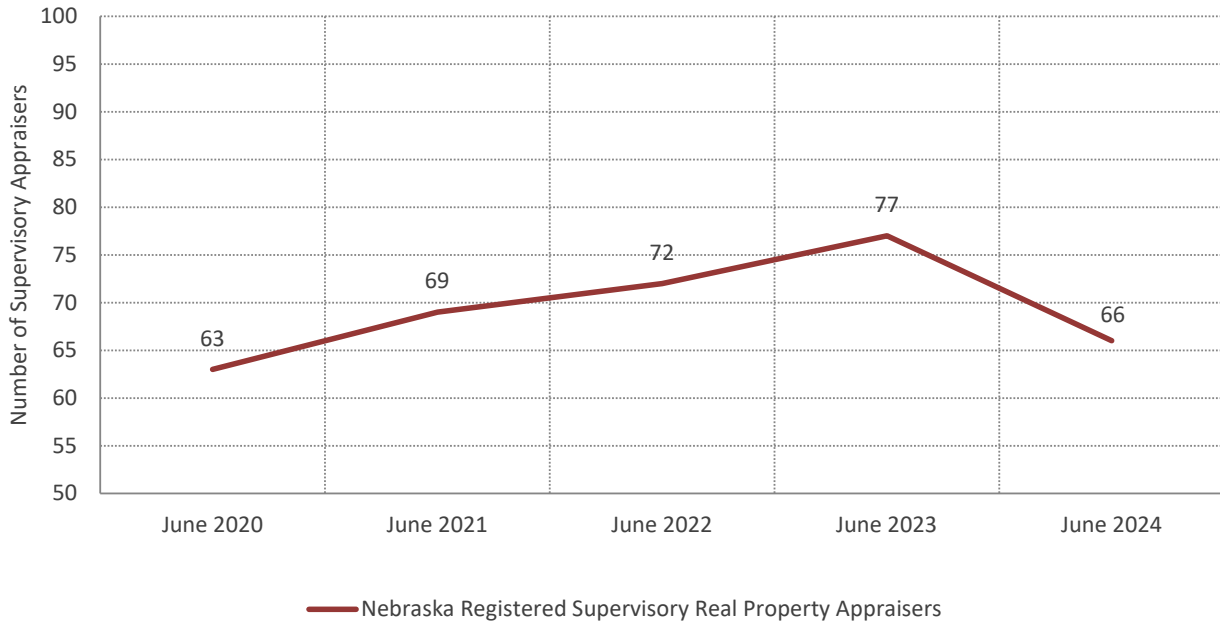
Appraisal Management Company Report

Appraisal Management Companies - Thirteen Month Trend

Number of AMCs

Month	Value
Jun-23	80
Jul-23	81
Aug-23	79
Sep-23	79
Oct-23	79
Nov-23	76
Dec-23	75
Jan-24	75
Feb-24	73
Mar-24	74
Apr-24	74
May-24	74
Jun-24	74

— Nebraska Registered AMCs
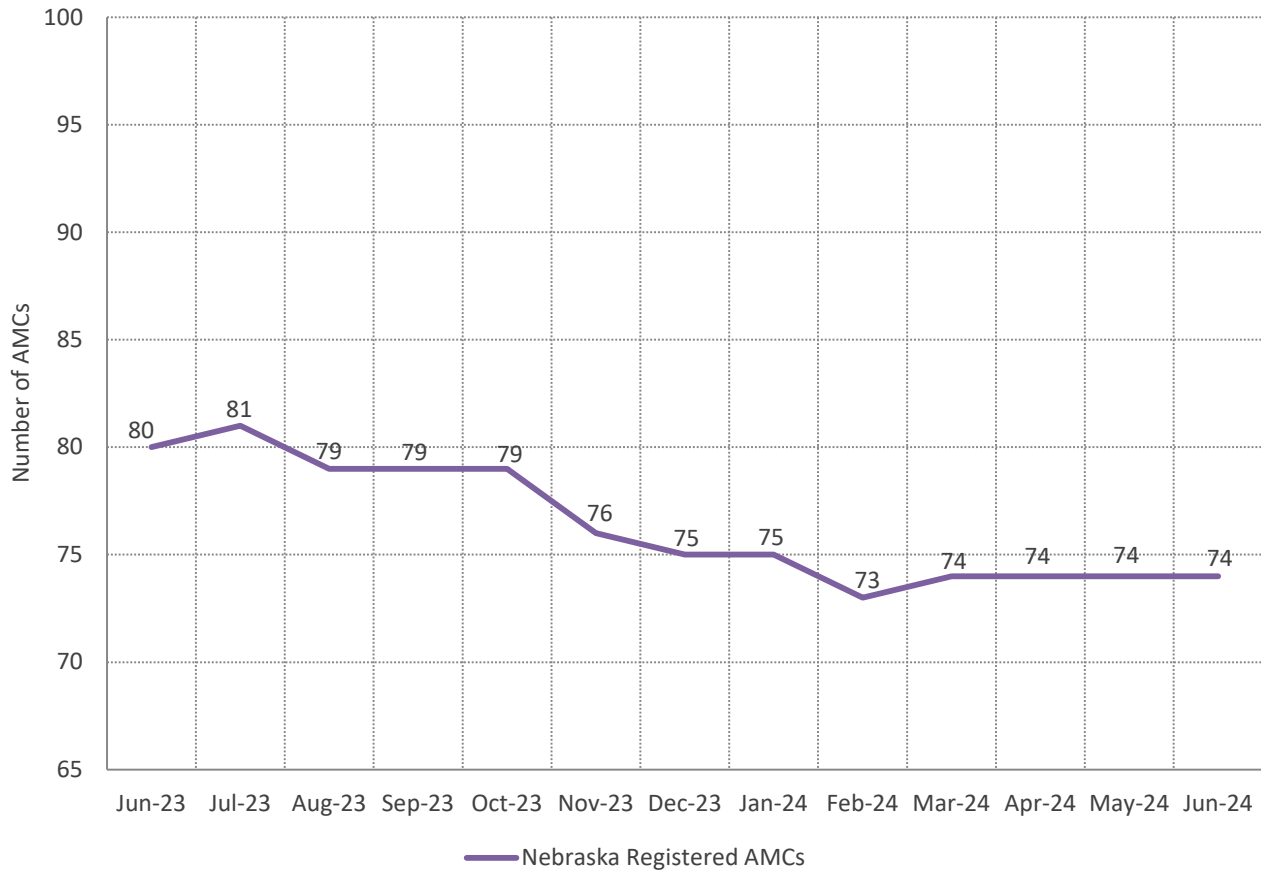
Appraisal Management Companies - Five Year Trend

Number of AMCs

Year	Value
June 2020	91
June 2021	91
June 2022	94
June 2023	80
June 2024	74

— Nebraska Registered AMCs
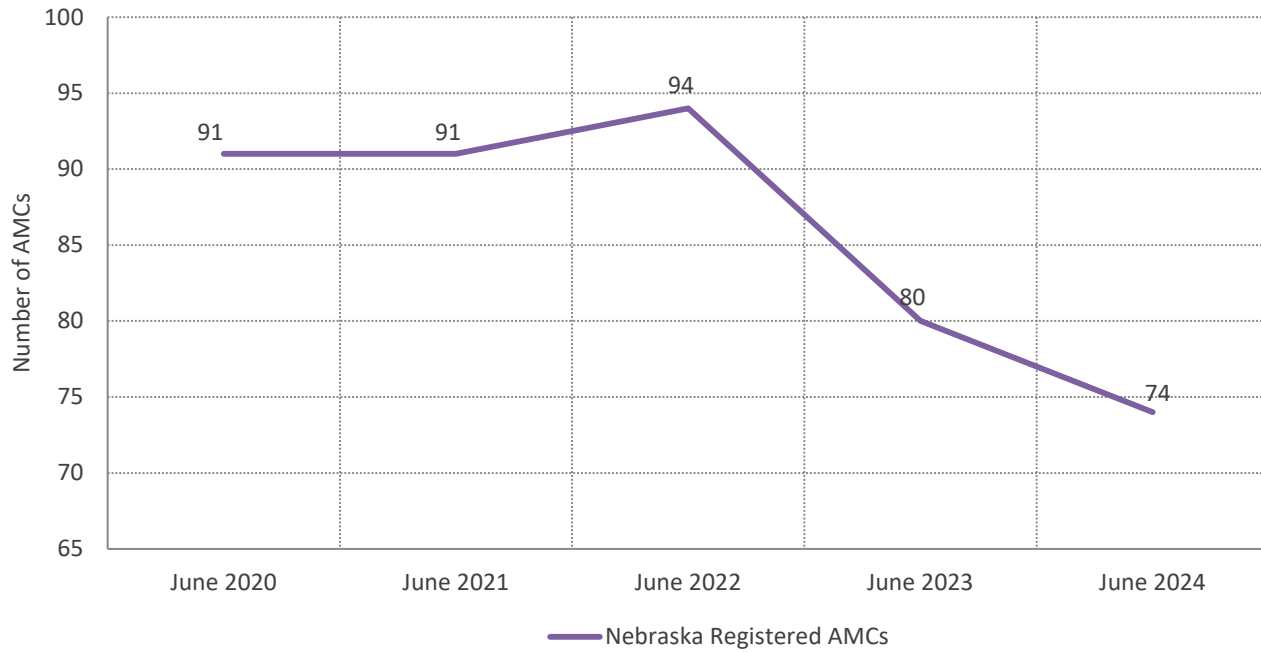
NEBRASKA REAL PROPERTY APPRAISER BOARD
DIRECTOR APPROVAL OF REAL PROPERTY APPRAISER APPLICANTS

May 8, 2024 – June 7, 2024

New Certified General Real Property Appraisers through Reciprocity		
CG2024008R	Sheeley, Megan	Approved May 8, 2024
CG2024009R	Beyer, David	Approved May 9, 2024
CG2024011R	Wood, Michael	Approved May 16, 2024
CG2024010R	Stephens, Jacob	Approved May 17, 2024
CG2024012R	Liddell, Darrin	Approved May 30, 2024
CG24008R	Lantz, Chris	Approved June 5, 2024

NEBRASKA REAL PROPERTY APPRAISER BOARD
DIRECTOR APPROVAL OF EDUCATION ACTIVITY AND INSTRUCTOR(S) APPLICANTS
May 8, 2024 – June 7, 2024

Provider	Activity Number	Hours	Title	Instructor(s)	Approval Date
New Continuing Education Activities and Instructors					
ASFMRA	2241450.01	8	Appraising Ag Facilities: Poultry Seminar	Stacy Jackson	5/15/2024
ASFMRA	2243451.01	8	Appraising Ag Facilities: Poultry Seminar	Stacy Jackson	5/15/2024
McKissock, LLC	2241446.03	4	Navigating Essential Tools for Real Estate Appraisal	Dan Bradley, Wallace Czekalski, Robert Frazier, Charles Huntoon, Kevin Hecht, Mel Black, Alan Hummel, Greg Stephens, John Dingeman, Robert Luciani, Howard Kanter, Larry McMillen, Steve Maher, Tony Pistilli, Alexander Gilbert, Pam Teel, Julie Molendorp-Floyd, Dan Tosh, Daniel Bone, Josh Walitt, Charles Fisher	5/20/2024
McKissock, LLC	2243447.03	4	Live Webinar: Navigating Essential Tools for Real Estate Appraisal	Dan Bradley, Alexander Gilbert, Diana Jacob, Robert Frazier, Charles Huntoon, Kevin Hecht, Mel Black, Alan Hummel, Greg Stephens, John Dingeman, Phillicia Lloyd, Robert Abelson, Robert McClelland, Pam Teel, Julie Molendorp-Floyd, Jo Traut, Steve Maher, Josh	5/20/2024

				Walitt, Charles Fisher	
The CE Shop, LLC	2243155.77	7	2024-2025 7-Hour National USPAP Update Course	Rebecca Jones, Justin Merrill	5/30/2024
New Qualifying Education Activities and Instructors					
ASFMRA	1241452.01	30	General Appraiser Report Writing and Case Studies (A350)	Ray Wagester	5/15/2024
ASFMRA	1243453.01	30	General Appraiser Report Writing and Case Studies (A350)	Ray Wagester	5/15/2024
ASFMRA	1241448.01	15	Introduction to Statistical Analysis for Appraisers (A200)	Douglas Hodge, Timothy Hodge	5/29/2024
ASFMRA	1243449.01	15	Introduction to Statistical Analysis for Appraisers (A200)	Douglas Hodge, Timothy Hodge	5/29/2024
The CE Shop, LLC	1243154.77	15	15-Hour National USPAP Course [2024]	Rebecca Jones, Justin Merrill	5/30/2024

STATE OF NEBRASKA

Department of Administrative Services

Accounting Division

Budget Status Report

As of 05/31/24

Agency	053	REAL PROPERTY APPRAISER BD
Division	000	Real Property App Bd
Program	079	APPRAISER LICENSING

Percent of Time Elapsed =   92.05

ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
BUDGETED FUND TYPES - EXPENDITURES						
510000 PERSONAL SERVICES						
511100 PERMANENT SALARIES-WAGES	182,321.14	22,272.36	162,346.18	89.04		19,974.96
511300 OVERTIME PAYMENTS	3,525.00		3,522.82	99.94		2.18
511600 PER DIEM PAYMENTS	7,700.00	1,000.00	5,900.00	76.62		1,800.00
512100 VACATION LEAVE EXPENSE	10,803.24	2,045.55	10,461.59	96.84		341.65
512200 SICK LEAVE EXPENSE	1,042.06	32.27	1,028.18	98.67		13.88
512300 HOLIDAY LEAVE EXPENSE	10,403.50	839.66	9,068.44	87.17		1,335.06
Personal Services Subtotal	215,794.94	26,189.84	192,327.21	89.12	0.00	23,467.73
515100 RETIREMENT PLANS EXPENSE	15,606.08	1,886.22	13,959.75	89.45		1,646.33
515200 FICA EXPENSE	16,479.44	1,861.00	13,501.19	81.93		2,978.25
515500 HEALTH INSURANCE EXPENSE	43,891.00	4,786.02	39,105.14	89.10		4,785.86
516500 WORKERS COMP PREMIUMS	1,546.00		1,546.00	100.00		
Major Account 510000 Total	293,317.46	34,723.08	260,439.29	88.79	0.00	32,878.17
520000 OPERATING EXPENSES						
521100 POSTAGE EXPENSE	2,752.30	148.61	2,387.73	86.75		364.57
521400 DATA PROCESSING EXPENSE	37,771.41	1,344.62	24,813.47	65.69		12,957.94
521500 PUBLICATION & PRINT EXPENSE	3,269.07	434.84	1,333.01	40.78		1,936.06
521900 AWARDS EXPENSE	50.00		28.00	56.00		22.00
522100 DUES & SUBSCRIPTION EXPENSE	600.00		600.00	100.00		
522200 CONFERENCE REGISTRATION	1,100.00		1,200.00	109.09		100.00-
524600 RENT EXPENSE-BUILDINGS	12,864.13	1,095.36	11,738.99	91.25		1,125.14
524900 RENT EXP-DUPR SURCHARGE	4,187.00	348.91	3,838.01	91.66		348.99
531100 OFFICE SUPPLIES EXPENSE	3,802.67		3,531.27	92.86		271.40
532100 NON CAPITALIZED EQUIP PU	4,032.00		2,201.70	54.61	1,830.00	.30
532260 VOICE EQUIP	232.00		229.33	98.85		2.67
533100 HOUSEHOLD & INSTIT EXP	10.00		9.51	95.10		.49
539500 PURCHASING CARD SUSPENSE			196.00			196.00-
541100 ACCTG & AUDITING SERVICES	1,128.00		1,128.00	100.00		
541200 PURCHASING ASSESSMENT	39.00		39.00	100.00		
541500 LEGAL SERVICES EXPENSE	20,000.00	1,189.00	1,189.00	5.95		18,811.00
541700 LEGAL RELATED EXPENSE	3,000.00		1.00	.03		2,999.00
542100 SOS TEMP SERV-PERSONNEL	4,668.00		4,666.66	99.97		1.34

K.1

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NIS0001   Department of Administrative Services   Page -   2
                                            Accounting Division   - Indicates Credit
                                            Budget Status Report
                                              As of 05/31/24

Agency   053   REAL PROPERTY APPRAISER BD   Percent of Time Elapsed =   92.05
Division   000   Real Property App Bd
Program   079   APPRAISER LICENSING

	ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
554900	OTHER CONTRACTUAL SERVICE	32,983.75	2,018.05	20,011.86	60.67		12,971.89
556100	INSURANCE EXPENSE	49.00		52.51	107.16		3.51-
559100	OTHER OPERATING EXP	13,468.00		200.00	1.49		13,268.00
	Major Account 520000 Total	146,006.33	6,579.39	79,395.05	54.38	1,830.00	64,781.28
	570000 TRAVEL EXPENSES						
571100	BOARD & LODGING	4,196.00	890.93	2,942.82	70.13		1,253.18
571800	MEALS - TRAVEL STATUS	1,661.96	353.55	1,247.21	75.04		414.75
572100	COMMERCIAL TRANSPORTATION	1,700.00					1,700.00
573100	STATE-OWNED TRANSPORT	200.00					200.00
574500	PERSONAL VEHICLE MILEAGE	6,565.54	2,122.56	6,455.47	98.32		110.07
575100	MISC TRAVEL EXPENSES	565.50	52.80	209.55	37.06		355.95
	Major Account 570000 Total	14,889.00	3,419.84	10,855.05	72.91	0.00	4,033.95
	BUDGETED EXPENDITURES TOTAL	454,212.79	44,722.31	350,689.39	77.21	1,830.00	101,693.40

SUMMARY BY FUND TYPE - EXPENDITURES

		BUDGETED AMOUNT	CURRENT MONTH	YEAR-TO-DATE	PERCENT OF	ENCUMBERANCES	VARIANCE
2	CASH FUNDS	454,212.79	44,722.31	350,689.39	77.21	1,830.00	101,693.40
	BUDGETED EXPENDITURES TOTAL	454,212.79	44,722.31	350,689.39	77.21	1,830.00	101,693.40

BUDGETED FUND TYPES - REVENUES

470000 REVENUE - SALES AND CHARGES

		BUDGETED AMOUNT	CURRENT MONTH	YEAR-TO-DATE	PERCENT OF	ENCUMBERANCES	VARIANCE
471100	SALE OF SERVICES	425.00-	25.00-	425.00-	100.00		
471120	QUALIFYING ED COURSE FEES	750.00-	50.00-	1,275.00-	170.00		525.00
471121	CONTINUING ED NEW FEES	3,000.00-	100.00-	2,150.00-	71.67		850.00-
471122	CONTINUING ED RENEWAL FEES	200.00-		130.00-	65.00		70.00-
475150	CERTIFIED GENERAL NEW FEES	10,200.00-	1,200.00-	8,400.00-	82.35		1,800.00-
475151	LICENSED NEW FEES	1,200.00-		300.00-	25.00		900.00-
475152	FINGERPRINT FEES	3,574.75-	135.75-	2,172.00-	60.76		1,402.75-
475153	CERTIFIED RESIDENTIAL NEW	2,700.00-	600.00-	2,400.00-	88.89		300.00-
475154	CERTIFIED GENERAL RENEWAL	94,875.00-	825.00-	98,725.00-	104.06		3,850.00
475155	LICENSED RENEWAL	10,175.00-		9,900.00-	97.30		275.00-
475156	FINGERPRINT AUDIT PROGRAM FEES	3,380.00-	15.00-	3,330.00-	98.52		50.00-
475157	CERTIFIED RESIDENTIAL RENEWAL	56,100.00-		54,175.00-	96.57		1,925.00-

K.2

STATE OF NEBRASKA

Department of Administrative Services

Accounting Division

Budget Status Report

As of 05/31/24

Agency   053   REAL PROPERTY APPRAISER BD

Division   000   Real Property App Bd

Program   079   APPRAISER LICENSING

Percent of Time Elapsed =   92.05

ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
475161 TEMPORARY CERTIFIED GENERAL	9,000.00-	800.00-	7,650.00-	85.00		1,350.00-
475163 AMC REGISTERED NEW FEES	4,000.00-		4,000.00-	100.00		
475164 AMC APPLICATION FEES	700.00-		700.00-	100.00		
475165 AMC REGISTERED RENEWAL	114,000.00-	10,500.00-	100,500.00-	88.16		13,500.00-
475166 FED REG AMC RPT FORM PROC FEES	350.00-		350.00-	100.00		
475167 CERTIFIED RESIDENTIAL INACTIVE	300.00-					300.00-
475168 CERTIFIED GENERAL INACTIVE	300.00-					300.00-
475234 APPLICATION FEES	29,850.00-	2,050.00-	22,500.00-	75.38		7,350.00-
476101 LATE PROCESSING FEES	3,500.00-	475.00-	3,750.00-	107.14		250.00
Major Account 470000 Total	348,579.75-	16,775.75-	322,832.00-	92.61	0.00	25,747.75-
480000 REVENUE - MISCELLANEOUS						
481100 INVESTMENT INCOME	16,000.00-		18,079.58-	113.00		2,079.58
484500 REIMB NON-GOVT SOURCES	1,000.00-	625.00-	3,702.59-	370.26		2,702.59
Major Account 480000 Total	17,000.00-	625.00-	21,782.17-	128.13	0.00	4,782.17
490000 REVENUE - OTHER FINANCIAL SOURCES/U						
491300 SALE - SURP PROP/FIXED ASSET			63.48-			63.48
Major Account 490000 Total	0.00	0.00	63.48-	0.00	0.00	63.48
BUDGETED REVENUE TOTAL	365,579.75-	17,400.75-	344,677.65-	94.28	0.00	20,902.10-

SUMMARY BY FUND TYPE - REVENUE

2 CASH FUNDS	365,579.75-	17,400.75-	344,677.65-	94.28		20,902.10-
BUDGETED REVENUE TOTAL	365,579.75-	17,400.75-	344,677.65-	94.28	0.00	20,902.10-

K.3

Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25310	079	000	53105018.471100.		563720	05/30/24	RC	RB	NRPAB DEPOSIT 240530	7497476		25.00-
Total for Object			471100 SALE OF SERVICES									25.00-
25310	079	000	53105018.471120.		559917	05/08/24	RC	RB	NRPAB DEPOSIT 240508	7476480		50.00-
Total for Object			471120 QUALIFYING ED COURSE FEES									50.00-
25310	079	000	53105018.471121.		559917	05/08/24	RC	RB	NRPAB DEPOSIT 240508	7476480		25.00-
25310	079	000	53105018.471121.		560382	05/10/24	RC	RB	NRPAB DEPOSIT 240510	7479287		25.00-
25310	079	000	53105018.471121.		562183	05/21/24	RC	RB	NRPAB DEPOSIT 240521	7489009		25.00-
25310	079	000	53105018.471121.		562326	05/22/24	RC	RB	NRPAB DEPOSIT 240522	7490411		25.00-
Total for Object			471121 CONTINUING ED NEW FEES									100.00-
25310	079	000	53105018.475150.		559306	05/03/24	RC	RB	NRPAB DEPOSIT 240503	7471976		300.00-
25310	079	000	53105018.475150.		560845	05/14/24	RC	RB	NRPAB DEPOSIT 240514	7482306		300.00-
25310	079	000	53105018.475150.		562183	05/21/24	RC	RB	NRPAB DEPOSIT 240521	7489009		300.00-
25310	079	000	53105018.475150.		562326	05/22/24	RC	RB	NRPAB DEPOSIT 240522	7490411		300.00-
Total for Object			475150 CERTIFIED GENERAL NEW FEES									1,200.00-
25310	079	000	53105018.475152.		559306	05/03/24	RC	RB	NRPAB DEPOSIT 240503	7471976		45.25-
25310	079	000	53105018.475152.		560845	05/14/24	RC	RB	NRPAB DEPOSIT 240514	7482306		45.25-
25310	079	000	53105018.475152.		563129	05/28/24	RC	RB	NRPAB DEPOSIT 240528	7494182		45.25-
Total for Object			475152 FINGERPRINT FEES									135.75-
25310	079	000	53105018.475153.		559076	05/02/24	RC	RB	NRPAB DEPOSIT 240502	7470368		300.00-
25310	079	000	53105018.475153.		563131	05/28/24	RC	RB	NRPAB DEPOSIT 240528	7494839		300.00-
Total for Object			475153 CERTIFIED RESIDENTIAL NEW									600.00-
25310	079	000	53105018.475154.		560043	05/07/24	RC	RB	NRPAB APP REN EFW DEP 240507	7475696		550.00-
25310	079	000	53105018.475154.		560545	05/09/24	RC	RB	NRPAB APP REN EFW DEP 240509	7478758		275.00-
Total for Object			475154 CERTIFIED GENERAL RENEWAL									825.00-
25310	079	000	53105018.475156.		54958399	05/01/24	PV	V	SMITH, NICHOLAS	7463541		10.00
25310	079	000	53105018.475156.		560043	05/07/24	RC	RB	NRPAB APP REN EFW DEP 240507	7475696		10.00-
25310	079	000	53105018.475156.		560545	05/09/24	RC	RB	NRPAB APP REN EFW DEP 240509	7478758		5.00-
25310	079	000	53105018.475156.		561723	05/16/24	RC	RB	NRPAB APP REN EFW DEP 240516	7485810		10.00-
Total for Object			475156 FINGERPRINT AUDIT PROGRAM FEES									15.00-
25310	079	000	53105018.475161.		559076	05/02/24	RC	RB	NRPAB DEPOSIT 240502	7470368		50.00-
25310	079	000	53105018.475161.		559917	05/08/24	RC	RB	NRPAB DEPOSIT 240508	7476480		50.00-

K.4

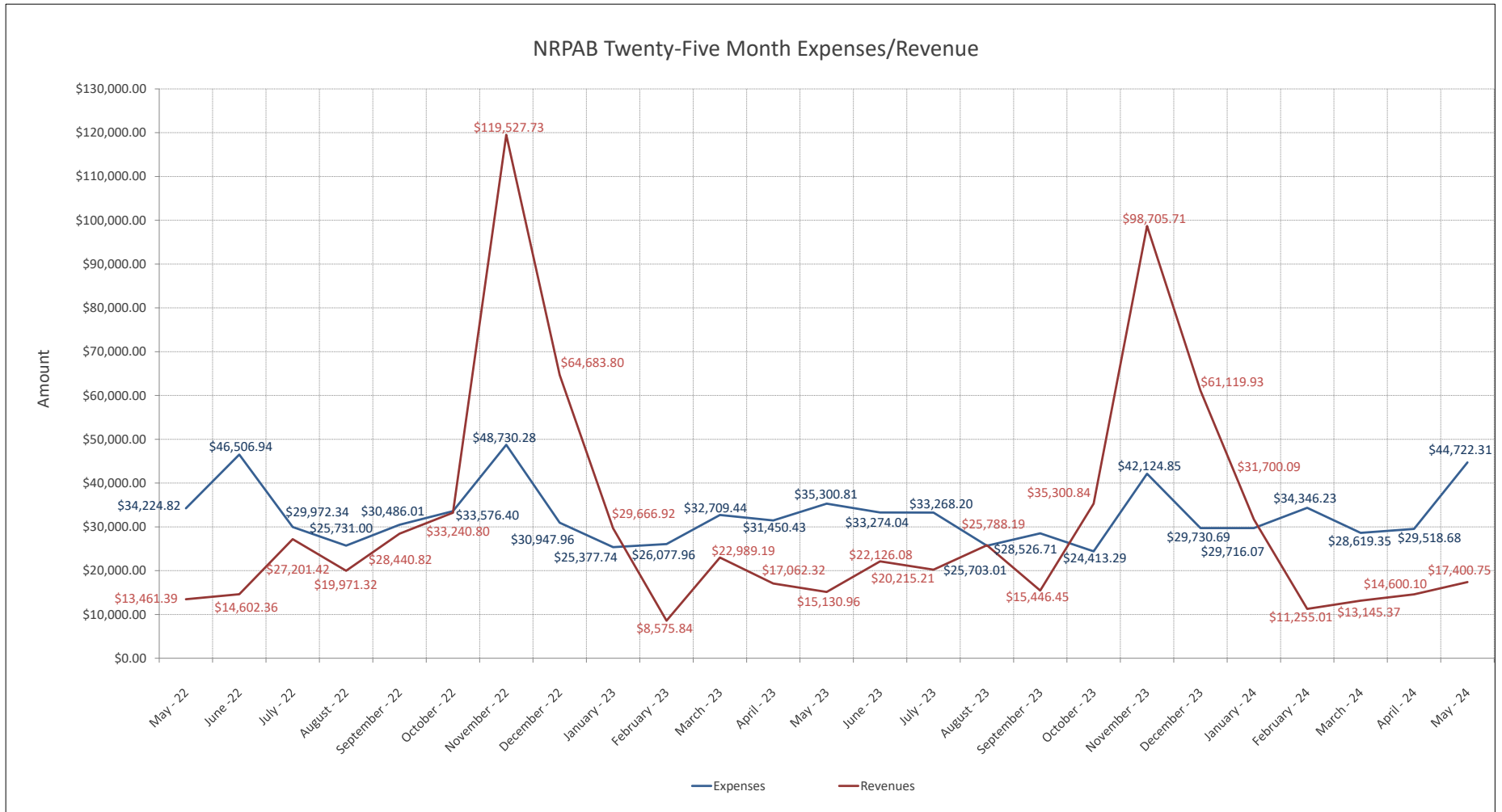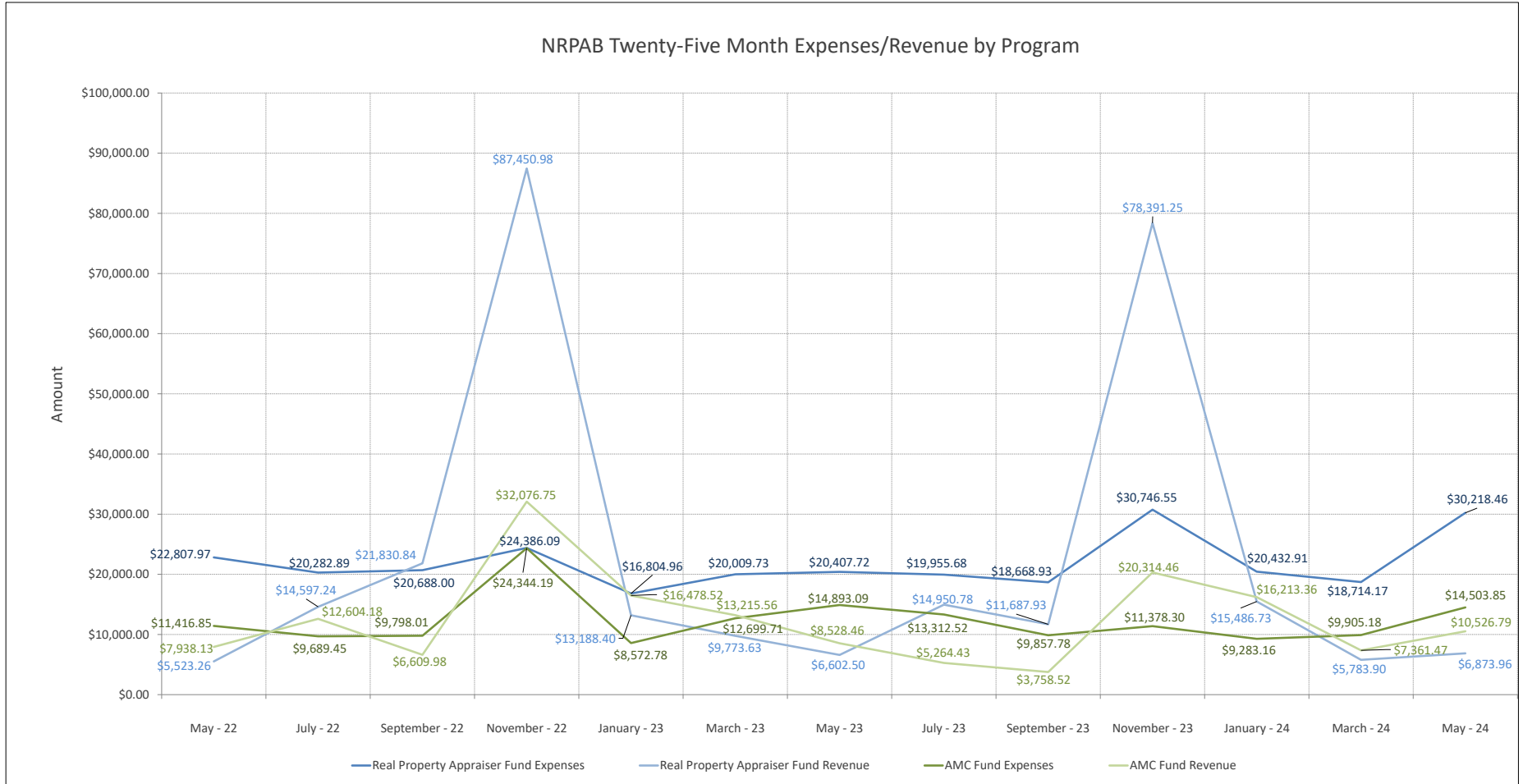| Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25310	079	000	53105018.475161.		560382	05/10/24	RC	RB	NRPAB DEPOSIT 240510	7479287		50.00-
25310	079	000	53105018.475161.		560845	05/14/24	RC	RB	NRPAB DEPOSIT 240514	7482306		100.00-
25310	079	000	53105018.475161.		561616	05/17/24	RC	RB	NRPAB DEPOSIT 240517	7485747		100.00-
25310	079	000	53105018.475161.		562183	05/21/24	RC	RB	NRPAB DEPOSIT 240521	7489009		50.00-
25310	079	000	53105018.475161.		562326	05/22/24	RC	RB	NRPAB DEPOSIT 240522	7490411		100.00-
25310	079	000	53105018.475161.		562908	05/24/24	RC	RB	NRPAB DEPOSIT 240524	7492842		150.00-
25310	079	000	53105018.475161.		563129	05/28/24	RC	RB	NRPAB DEPOSIT 240528	7494182		50.00-
25310	079	000	53105018.475161.		563720	05/30/24	RC	RB	NRPAB DEPOSIT 240530	7497476		100.00-
Total for Object			475161 TEMPORARY CERTIFIED GENERAL									800.00-
25310	079	000	53105018.475234.		559076	05/02/24	RC	RB	NRPAB DEPOSIT 240502	7470368		100.00-
25310	079	000	53105018.475234.		559306	05/03/24	RC	RB	NRPAB DEPOSIT 240503	7471976		150.00-
25310	079	000	53105018.475234.		559917	05/08/24	RC	RB	NRPAB DEPOSIT 240508	7476480		100.00-
25310	079	000	53105018.475234.		560382	05/10/24	RC	RB	NRPAB DEPOSIT 240510	7479287		100.00-
25310	079	000	53105018.475234.		560845	05/14/24	RC	RB	NRPAB DEPOSIT 240514	7482306		350.00-
25310	079	000	53105018.475234.		561616	05/17/24	RC	RB	NRPAB DEPOSIT 240517	7485747		200.00-
25310	079	000	53105018.475234.		562183	05/21/24	RC	RB	NRPAB DEPOSIT 240521	7489009		100.00-
25310	079	000	53105018.475234.		562326	05/22/24	RC	RB	NRPAB DEPOSIT 240522	7490411		200.00-
25310	079	000	53105018.475234.		562908	05/24/24	RC	RB	NRPAB DEPOSIT 240524	7492842		300.00-
25310	079	000	53105018.475234.		563129	05/28/24	RC	RB	NRPAB DEPOSIT 240528	7494182		250.00-
25310	079	000	53105018.475234.		563720	05/30/24	RC	RB	NRPAB DEPOSIT 240530	7497476		200.00-
Total for Object			475234 APPLICATION FEES									2,050.00-
25310	079	000	53105018.476101.		560043	05/07/24	RC	RB	NRPAB APP REN EFW DEP 240507	7475696		150.00-
25310	079	000	53105018.476101.		560545	05/09/24	RC	RB	NRPAB APP REN EFW DEP 240509	7478758		150.00-
25310	079	000	53105018.476101.		561723	05/16/24	RC	RB	NRPAB APP REN EFW DEP 240516	7485810		150.00-
Total for Object			476101 LATE PROCESSING FEES									450.00-
25310	079	000	53105018.484500.		23322737	05/01/24	JE	G	NRPAB PURCH CARD REBATE	7462303		1.79
25310	079	000	53105018.484500.		562183	05/21/24	RC	RB	NRPAB DEPOSIT 240521	7489009		625.00-
Total for Object			484500 REIMB NON-GOVT SOURCES									623.21-
25310	079	000	53105018.511100.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		5,047.28
25310	079	000	53105018.511100.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		4,551.91
25310	079	000	53105018.511100.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		4,877.97
Total for Object			511100 PERMANENT SALARIES-WAGES									14,477.16
25310	079	000	53105018.511600.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		325.00
25310	079	000	53105018.511600.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		325.00

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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
			Total for Object 511600 PER DIEM PAYMENTS									650.00
25310	079	000	53105018.512100.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		410.51
25310	079	000	53105018.512100.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		339.08
25310	079	000	53105018.512100.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		579.82
			Total for Object 512100 VACATION LEAVE EXPENSE									1,329.41
25310	079	000	53105018.512200.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		21.02
			Total for Object 512200 SICK LEAVE EXPENSE									21.02
25310	079	000	53105018.512300.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		545.78
			Total for Object 512300 HOLIDAY LEAVE EXPENSE									545.78
25310	079	000	53105018.515100.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		408.67
25310	079	000	53105018.515100.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		408.69
25310	079	000	53105018.515100.		3181575	05/29/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7490621		408.66
			Total for Object 515100 RETIREMENT PLANS EXPENSE									1,226.02
25310	079	000	53105018.515200.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		396.04
25310	079	000	53105018.515200.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		371.21
25310	079	000	53105018.515200.		3181575	05/29/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7490621		442.36
			Total for Object 515200 FICA EXPENSE									1,209.61
25310	079	000	53105018.515500.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		1,555.45
25310	079	000	53105018.515500.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		1,555.46
			Total for Object 515500 HEALTH INSURANCE EXPENSE									3,110.91
25310	079	000	53105018.521100.		23322874	05/01/24	JE	G	NRPAB POSTAGE MARCH 2024	7463392		29.95-
25310	079	000	53105018.521100.		23475327	05/16/24	JE	G	POSTAGE DUE APR 2024	7486308		148.61
			Total for Object 521100 POSTAGE EXPENSE									118.66
25310	079	000	53105018.521400.		55010649	05/01/24	PV	V	AS - OCIO - COMMUNICATIONS	7465137		144.05
25310	079	000	53105018.521400.		55139748	05/15/24	PV	V	AS - OCIO - IMSERVICES	7484381		729.96
			Total for Object 521400 CIO CHARGES									874.01
25310	079	000	53105018.521500.		23278654	05/13/24	JE	G	COPY SERVICES JAN-MAR 2024	7453615		407.09
25310	079	000	53105018.521500.		23463156	05/15/24	JE	G	NRPAB COPY SERV JAN-MAR 2024	7484915		142.48-
25310	079	000	53105018.521500.		2108873	05/23/24	OV	O	CORRECTIONAL SERVICES, DEPARTM	7493310		27.75
			Total for Object 521500 PUBLICATION & PRINT EXP									292.36

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25310	079	000	53105018.524600.		23322803	05/07/24	JE	G	RENT & LB530 MAY 2024 - OTHER	7462982		1,034.31
25310	079	000	53105018.524600.		54958318	05/01/24	PV	V	SECRETARY OF STATE	7463408		20.74
25310	079	000	53105018.524600.		23447751	05/14/24	JE	G	NRPAB RENT MAY 2024	7483276		362.01-
25310	079	000	53105018.524600.		55131026	05/14/24	PV	V	SECRETARY OF STATE	7484201		18.95
Total for Object			524600 RENT EXPENSE-BUILDINGS									711.99
25310	079	000	53105018.524900.		23322803	05/07/24	JE	G	RENT & LB530 MAY 2024 - OTHER	7462982		348.91
25310	079	000	53105018.524900.		23447751	05/14/24	JE	G	NRPAB RENT MAY 2024	7483276		122.12-
Total for Object			524900 RENT EXP-DEPR SURCHARGE									226.79
25310	079	000	53105018.541500.		55140436	05/15/24	PV	V	BLAKE LAW	7484957		635.50
25310	079	000	53105018.541500.		55140436	05/15/24	PV	V	BLAKE LAW	7484957		553.50
Total for Object			541500 LEGAL SERVICES EXPENSE									1,189.00
25310	079	000	53105018.554900.		54958415	05/01/24	PV	V	REALCORP	7463568		500.00
25310	079	000	53105018.554900.		55009604	05/01/24	PV	V	INGALLS APPRAISALS LLC	7464233		625.00
25310	079	000	53105018.554900.		55130298	05/14/24	PV	V	DATASHIELD CORPORATION	7483444		14.00
25310	079	000	53105018.554900.		23447770	05/14/24	JE	G	NRPAB DATASHIELD SHREDDING	7483479		4.90-
25310	079	000	53105018.554900.		55131003	05/14/24	PV	V	LUHRS REAL ESTATE & APPRAISALS	7484173		875.00
25310	079	000	53105018.554900.		55131026	05/14/24	PV	V	SECRETARY OF STATE	7484201		3.77
Total for Object			554900 OTHER CONTRACTUAL SERVICES									2,012.87
25310	079	000	53105018.571100.		55131019	05/14/24	PV	V	CORNHUSKER HOTEL	7484189		139.10
25310	079	000	53105018.571100.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		440.00
Total for Object			571100 LODGING									579.10
25310	079	000	53105018.571800.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		40.27
25310	079	000	53105018.571800.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		40.27
25310	079	000	53105018.571800.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		68.71
25310	079	000	53105018.571800.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		40.27
25310	079	000	53105018.571800.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		40.27
Total for Object			571800 MEALS - TRAVEL STATUS									229.79
25310	079	000	53105018.574500.		55010695	05/01/24	PV	V	HERMSEN, KEVIN P	7465166		37.45
25310	079	000	53105018.574500.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		200.33
25310	079	000	53105018.574500.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		204.69
25310	079	000	53105018.574500.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		594.89
25310	079	000	53105018.574500.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		204.89

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25310	079	000	53105018.574500.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		100.17
25310	079	000	53105018.574500.		55179400	05/22/24	PV	V	HERMSEN, KEVIN P	7491469		37.45
Total for Object			574500 PERSONAL VEHICLE MILEAGE									1,379.67
25310	079	000	53105018.575100.		55010695	05/01/24	PV	V	HERMSEN, KEVIN P	7465166		2.72
25310	079	000	53105018.575100.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		7.31
25310	079	000	53105018.575100.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		7.31
25310	079	000	53105018.575100.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		7.31
25310	079	000	53105018.575100.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		7.31
25310	079	000	53105018.575100.		55179400	05/22/24	PV	V	HERMSEN, KEVIN P	7491469		2.35
Total for Object			575100 MISC TRAVEL EXPENSE									34.31
Total for Business Unit		53105018	NE REAL PROPERTY APPRAISER									23,344.50
25320	079	000	53105200.475165.		559157	05/01/24	RC	RB	NRPAB AMC REN EFW DEP 240501	7469341		1,500.00-
25320	079	000	53105200.475165.		559305	05/03/24	RC	RB	NRPAB AMC DEPOSIT 240503	7471996		1,500.00-
25320	079	000	53105200.475165.		560546	05/09/24	RC	RB	NRPAB AMC REN EFW DEP 240509	7478823		3,000.00-
25320	079	000	53105200.475165.		560943	05/13/24	RC	RB	NRPAB AMC REN EFW DEP 240513	7481343		1,500.00-
25320	079	000	53105200.475165.		561273	05/15/24	RC	RB	NRPAB AMC REN EFW DEP	7484342		1,500.00-
25320	079	000	53105200.475165.		563737	05/30/24	RC	RB	NRPAB AMC DEPOSIT 240530	7497024		1,500.00-
Total for Object			475165 AMC REGISTERED RENEWAL									10,500.00-
25320	079	000	53105200.476101.		563737	05/30/24	RC	RB	NRPAB AMC DEPOSIT 240530	7497024		25.00-
Total for Object			476101 LATE PROCESSING FEES									25.00-
25320	079	000	53105200.484500.		23322737	05/01/24	JE	G	NRPAB PURCH CARD REBATE	7462303		1.79-
Total for Object			484500 REIMB NON-GOVT SOURCES									1.79-
25320	079	000	53105200.511100.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		2,717.60
25320	079	000	53105200.511100.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		2,451.11
25320	079	000	53105200.511100.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		2,626.49
Total for Object			511100 PERMANENT SALARIES-WAGES									7,795.20
25320	079	000	53105200.511600.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		175.00
25320	079	000	53105200.511600.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		175.00
Total for Object			511600 PER DIEM PAYMENTS									350.00
25320	079	000	53105200.512100.		3180890	05/01/24	T2	7	PAYROLL LABOR DISTRIBUTION	7462918		221.23
25320	079	000	53105200.512100.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		8288

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25320	079	000	53105200.512100.		3181574	05/29/24	T2	7	PAYROLL LABOR DISTRIBUTION	7490621		312.33
Total for Object			512100 VACATION LEAVE EXPENSE									716.14
25320	079	000	53105200.512200.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		11.25
Total for Object			512200 SICK LEAVE EXPENSE									11.25
25320	079	000	53105200.512300.		3181326	05/15/24	T2	7	PAYROLL LABOR DISTRIBUTION	7476213		293.88
Total for Object			512300 HOLIDAY LEAVE EXPENSE									293.88
25320	079	000	53105200.515100.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		220.07
25320	079	000	53105200.515100.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		220.05
25320	079	000	53105200.515100.		3181575	05/29/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7490621		220.08
Total for Object			515100 RETIREMENT PLANS EXPENSE									660.20
25320	079	000	53105200.515200.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		213.29
25320	079	000	53105200.515200.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		199.88
25320	079	000	53105200.515200.		3181575	05/29/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7490621		238.22
Total for Object			515200 FICA EXPENSE									651.39
25320	079	000	53105200.515500.		3180891	05/01/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7462918		837.56
25320	079	000	53105200.515500.		3181327	05/15/24	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7476213		837.55
Total for Object			515500 HEALTH INSURANCE EXPENSE									1,675.11
25320	079	000	53105200.521100.		23322874	05/01/24	JE	G	NRPAB POSTAGE MARCH 2024	7463392		29.95
Total for Object			521100 POSTAGE EXPENSE									29.95
25320	079	000	53105200.521400.		55010649	05/01/24	PV	V	AS - OCIO - COMMUNICATIONS	7465137		77.56
25320	079	000	53105200.521400.		55139748	05/15/24	PV	V	AS - OCIO - IMSERVICES	7484381		393.05
Total for Object			521400 CIO CHARGES									470.61
25320	079	000	53105200.521500.		23463156	05/15/24	JE	G	NRPAB COPY SERV JAN-MAR 2024	7484915		142.48
Total for Object			521500 PUBLICATION & PRINT EXP									142.48
25320	079	000	53105200.524600.		54958318	05/01/24	PV	V	SECRETARY OF STATE	7463408		11.16
25320	079	000	53105200.524600.		23447751	05/14/24	JE	G	NRPAB RENT MAY 2024	7483276		362.01
25320	079	000	53105200.524600.		55131026	05/14/24	PV	V	SECRETARY OF STATE	7484201		10.20
Total for Object			524600 RENT EXPENSE-BUILDINGS									383.37
25320	079	000	53105200.524900.		23447751	05/14/24	JE	G	NRPAB RENT MAY 2024	7483276		22.92

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Total for Object			524900 RENT EXP-DEPR SURCHARGE									122.12
25320	079	000	53105200.554900.		23447770	05/14/24	JE	G	NRPAB DATASHIELD SHREDDING	7483479		4.90
25320	079	000	53105200.554900.		55131026	05/14/24	PV	V	SECRETARY OF STATE	7484201		.28
Total for Object			554900 OTHER CONTRACTUAL SERVICES									5.18
25320	079	000	53105200.571100.		55131019	05/14/24	PV	V	CORNHUSKER HOTEL	7484189		74.90
25320	079	000	53105200.571100.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		236.93
Total for Object			571100 LODGING									311.83
25320	079	000	53105200.571800.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		21.69
25320	079	000	53105200.571800.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		21.69
25320	079	000	53105200.571800.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		37.00
25320	079	000	53105200.571800.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		21.69
25320	079	000	53105200.571800.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		21.69
Total for Object			571800 MEALS - TRAVEL STATUS									123.76
25320	079	000	53105200.574500.		55010695	05/01/24	PV	V	HERMSEN, KEVIN P	7465166		20.17
25320	079	000	53105200.574500.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		107.87
25320	079	000	53105200.574500.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		110.21
25320	079	000	53105200.574500.		55150846	05/16/24	PV	V	KOHTZ, TYLER N	7487175		320.33
25320	079	000	53105200.574500.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		110.21
25320	079	000	53105200.574500.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		53.93
25320	079	000	53105200.574500.		55179400	05/22/24	PV	V	HERMSEN, KEVIN P	7491469		20.17
Total for Object			574500 PERSONAL VEHICLE MILEAGE									742.89
25320	079	000	53105200.575100.		55010695	05/01/24	PV	V	HERMSEN, KEVIN P	7465166		1.46
25320	079	000	53105200.575100.		55010776	05/01/24	PV	V	MINSHULL, DEREK	7465241		3.94
25320	079	000	53105200.575100.		55130001	05/14/24	PV	V	DOWNING, BONNIE M	7483254		3.94
25320	079	000	53105200.575100.		55179356	05/22/24	PV	V	DOWNING, BONNIE M	7491367		3.94
25320	079	000	53105200.575100.		55179379	05/22/24	PV	V	JOHNSON, RODNEY D	7491441		3.94
25320	079	000	53105200.575100.		55179400	05/22/24	PV	V	HERMSEN, KEVIN P	7491469		1.27
Total for Object			575100 MISC TRAVEL EXPENSE									18.49
Total for Business Unit		53105200	AMC LICENSING									3,977.06
Total for Division		000										27,321.56
Total for Agency		053	REAL PROPERTY APPRAISER BD									~~27,321.56~~

K.10

Financial Report and Considerations - Financial Charts

NRPAB Twenty-Five Month Expenses/Revenue

Revenues (red line):
- May - 22: $13,461.39
- June - 22: $14,602.36
- July - 22: $27,201.42
- August - 22: $19,971.32
- September - 22: $28,440.82
- October - 22: $33,240.80
- November - 22: $119,527.73
- December - 22: $64,683.80
- January - 23: $29,666.92
- February - 23: $8,575.84
- March - 23: $22,989.19
- April - 23: $17,062.32
- May - 23: $15,130.96
- June - 23: $22,126.08
- July - 23: $20,215.21
- August - 23: $25,703.01
- September - 23: $15,446.45
- October - 23: $35,300.84
- November - 23: $98,705.71
- December - 23: $61,119.93
- January - 24: $31,700.09
- February - 24: $11,255.01
- March - 24: $13,145.37
- April - 24: $14,600.10
- May - 24: $17,400.75

Expenses (blue line):
- May - 22: $34,224.82
- June - 22: $46,506.94
- July - 22: $29,972.34
- August - 22: $25,731.00
- September - 22: $30,486.01
- October - 22: $33,576.40
- November - 22: $48,730.28
- December - 22: $30,947.96
- January - 23: $25,377.74
- February - 23: $26,077.96
- March - 23: $32,709.44
- April - 23: $31,450.43
- May - 23: $35,300.81
- June - 23: $33,274.04
- July - 23: $33,268.20
- August - 23: $25,788.19
- September - 23: $28,526.71
- October - 23: $24,413.29
- November - 23: $42,124.85
- December - 23: $29,730.69
- January - 24: $29,716.07
- February - 24: $34,346.23
- March - 24: $28,619.35
- April - 24: $29,518.68
- May - 24: $44,722.31

Legend: Expenses, Revenues

K.11

Financial Report and Considerations - Financial Charts

NRPAB Twenty-Five Month Expenses/Revenue by Program

Financial Report and Considerations - Financial Charts

NRPAB Twenty-Five Month Cash Balance

Legend: Appraiser Fund, AMC Fund, Total Agency

K.13

Financial Report and Considerations - Financial Charts

NRPAB Five Year Cash Balance

	FY 19	FY 20	FY 21	FY 22	FY 23
Fiscal Year End Balance	$572,677.01	$696,538.68	$716,841.48	$745,144.27	
May Balance	$572,931.17	$692,659.40	$748,591.04	$749,797.83	$736,209.28
Appraiser Fund -YE Balance	$296,663.84	$381,085.46	$372,339.68	$415,045.78	
Appraiser Fund - May	$303,498.84	$391,347.27	$395,969.44	$424,719.91	$411,698.54
AMC Fund - YE Balance	$269,178.17	$305,191.41	$344,501.80	$330,098.49	
AMC Fund - May	$276,267.33	$311,573.94	$352,621.60	$325,077.92	$324,510.74

NRPAB
Nebraska Real Property Appraiser Board
Agenda Item Summary

Prepared By: Tyler Kohtz   **Title:** Director   **Date:** 6/1/2024

Agenda Section: Financial Report and Considerations

Agenda Item Identification Number: K.2

Subject: NRPAB Employee Recognition Award

Description: Four NRPAB employees nominated for NRPAB Employee Recognition Award in FY 2023-24

SUMMARY

Tyler Kohtz, Allison Nespor, Kashinda Sims, and Karen Loll represented the Board with integrity, and performed their duties with efficiency and accuracy during FY 2023-24. For their excellence in service during FY 2023-24, each were all nominated for a $500.00 monetary gift issued with the June 26, 2024 payroll in accordance with the Board's Employee Recognition Plan (Internal Procedure 201702). These nominations were approved by Chairperson Downing and publicly recognized by the Board at its June 20, 2024 regular meeting. In order to accommodate the four excellence in service awards, approval for funding is requested in the amount of $2,000.00 to be transferred from Other Operating Expenses (559100) to Employee Bonuses (511700).

RELEVANT LAWS/RULES/GUIDANCE DOCUMENTS/INTERNAL PROCEDURES

Internal Procedure 201702 - An employee or board member may be recognized no more than once annually for his or her excellence through service (not "Years of Service"), contributions, and/or achievements with an award not to exceed $500.00 in value. An employee or board member may be nominated by any other employee or board member. A nomination must be made in writing, include the reason for the nomination, and a recommended award. The Director or Board Chair shall be responsible for evaluation and approval of the nomination and requested award. A recipient of an award will be recognized publicly by the Board at its next regularly scheduled meeting. An award is not the same as an employee bonus (not allowed except for pilot programs approved by DAS).

DISCIPLINARY/WRITTEN ADVISORY HISTORY

None

EXHIBITS

None

K.16

NEBRASKA REAL PROPERTY APPRAISER BOARD
EDUCATION APPLICANTS
TABLE OF CONTENTS
June 20, 2024

NRPAB
Nebraska Real Property Appraiser Board

Agenda Item Summary

Prepared By: Kashinda Sims   **Title:** Education Program Manager   **Date:** 06/20/2024

Agenda Section: M. Education

Agenda Item Identification Number: 2243458.33

Subject: Appraiser eLearning Activity, "Scan to Sketch - Practical Application of Mobile Appraising"

Description: Appraiser eLearning Application for Approval as a Continuing Education Activity in Nebraska for the activity, "Scan to Sketch - Practical Application of Mobile Appraising" may not meet the requirements for approval under 298 Chapter 6, §003.01A(15).

SUMMARY

An Application for Approval as a Continuing Education Activity in Nebraska ("Application") was received for the activity, "Scan to Sketch - Practical Application of Mobile Appraising on May 20, 2024. [Exhibit 1] Upon review of the material, the primary purpose of the activity appears to be training in the use of a specific software instead of a utilization of software to improve competency in real property appraisal-related computer applications. [Exhibit 2]

RELEVANT LAWS/RULES/GUIDANCE DOCUMENTS/INTERNAL PROCEDURES

298 NAC Chapter 6 § 003.01A(15) - any continuing education activity must contribute to a credential holder's development of real property appraiser related skill, knowledge, and competency in any one or more of the subjects identified, including real property appraisal-related computer applications.

298 NAC Chapter 6 §003.01D - Any activity in which the primary purpose is training in the use of a specific software, and not utilization of a software to improve competency in real property appraisal practice does not meet the requirements for approval as a continuing education activity.

DISCIPLINARY/WRITTEN ADVISORY HISTORY

There are no known previous disciplinary actions taken by the Board, or written advisories issued by the Board.

EXHIBITS

Exhibit 1 - "Appraiser eLearning (Scan to Sketch - Pract App of Mobile Appr) Application_May 20, 2024" located in Database under Education Activity Material Log dated 06/03/2024 (Education Interface dropdown/ Select 'Search Education'/ Select 'Activity' in 'Search By' dropdown/ Enter '2243458' for 'Activity Number')

Exhibit 2 - "Appraiser eLearning (Scan to Sketch - Pract App of Mobile Appr) Stdnt Ins Material_May 20, 2024 (Education Interface dropdown/ Select 'Search Education'/ Select 'Activity' in 'Search By' dropdown/ Enter '2243458' for 'Activity Number')

M.3

Exhibit #1

NRPAB
Nebraska Real Property Appraiser Board

301 Centennial Mall South, First Floor
PO Box 94963
Lincoln, NE 68509-4963
https://appraiser.ne.gov/
402-471-9015

APPLICATION FOR APPROVAL AS A CONTINUING EDUCATION ACTIVITY IN NEBRASKA

This application is to be used by an education provider applying for approval of a continuing education activity or resubmission of an approved continuing education activity. A separate application form must be filed for each continuing education activity submitted for approval. Applicants should carefully read Chapter 6 of Title 298 of the Nebraska Administrative Code before completing the information below. Any application deemed to be incomplete may be returned.

Education Provider Information

Education Provider Name: _____

Contact Person Name: _____ _____ _____
                              Last   First   Middle

Address: _____ _____ _____ _____
              PO Box or Street Number   City   State   Zip Code + 4

_____   _____
        Email Address   Area Code + Phone Number

Continuing Education Activity Information

Per the Real Property Appraiser Qualifications Criteria effective on January 1, 2022, synchronous educational offering means, the instructor and students interact simultaneously online, similar to a phone call, video chat or live webinar, or web-based meeting; asynchronous educational offering means the instructor and students' interaction is non-simultaneous, and the student progresses at their own pace and follows a structured course content and quiz/exam schedule.

Activity Title: _____

Activity Length (Hours): _____

Except for semester hours received from an accredited college or university, fifty minutes engaged in instructions equals one hour for all activities. The prescribed number of activity hours includes time for examinations, if applicable. Each continuing education activity shall be at least two hours in length, not to exceed eight hours per day. At least a one-half hour break shall be given to credential holder(s) by no later than the end of four hours of class in any day.

Activity Setting: ☐ Classroom   ☐ Synchronous   ☐ Asynchronous   ☐ Hybrid

The activity is being submitted for approval as: ☐ Seven-hour National USPAP Update Course   ☐ Other

AQB CAP Approval: ☐ Yes   ☐ No

This submission is a: ☐ New Continuing Education Activity   ☐ Resubmission of an Approved Continuing Education Activity

Continuing Education Activity Secondary Provider: ☐ Yes   ☐ No

Exhibit #1

Resubmission Checklist

If *New Continuing Education Activity* is selected under CONTINUING EDUCATION ACTIVITY INFORMATION, proceed to APPLICATION CHECKLIST.

If *Resubmission of an Approved Continuing Education Activity* is selected under CONTINUING EDCUATION ACTIVITY INFORMATION, the reason for resubmission is:

☐ There is a change in the status of approval by the Appraiser Qualifications Board of The Appraisal Foundation through its Course Approval Program.

☐ There is a change in the status of the 298 NAC, Chapter 6 §001.15 qualifications under which a distance education activity was approved.

☐ There is a substantial change to the materials, presentation, or policies.

☐ There is a change in the qualifications as specified in 298 NAC, Chapter 6, § 005 for any instructor.

☐ One or more instructors are added or removed by the education provider.

☐ The materials, theories, and/or methodologies are no longer current.

☐ The activity content and/or policies are no longer communicated or administered as approved.

☐ There is a change to a secondary provider's rights to the activity.

Application Checklist

All materials submitted to the Board related to an Application for Approval as a Continuing Education Activity in Nebraska are for Board use only and shall be retained by the Board. Except for the completed application, the non-refundable $25.00 application fee, and a written explanation of the reason for resubmission, if *Resubmission of an Approved Continuing Education Activity* is selected under CONTINUING EDUCATION ACTIVITY INFORMATION, only the items that have changed since the last submission need to be included.

General

Required for all continuing education activities.

☐ Completed application.

☐ Non-refundable $25.00 application fee.

☐ A document certifying completion issued to each attendee upon completion of any continuing education activity. The document includes the name of education provider, signature of education provider and/or instructor, name of activity as approved, location at which activity was conducted or presentation method, date(s) activity was conducted, number of hours, pass or fail statement, and name of attendee, **or** be an official transcript from a university or college that includes the name of activity as approved, the number of credit hours awarded, and the name of the attendee.

AND if *Yes* is selected for Continuing Education Activity Secondary Provider under CONTINUING EDUCATION ACTIVITY INFORMATION:

☐ Evidence that the rights to the continuing education activity have been purchased or lawfully acquired from the education provider that owns the rights to the activity materials.

AND if *Resubmission of an Approved Continuing Education Activity* is selected under CONTINUING EDUCATION ACTIVITY INFORMATION:

☐ A written explanation of the reason for resubmission.

Exhibit #1

Non-AQB Approved Continuing Education Activities

For an activity not approved by the Appraiser Qualifications Board of The Appraisal Institute through its Course Approval Program for continuing education, submit the following:

☐ An activity description that clearly describes the content.

☐ All student and instructor materials that meet the requirements of 298 NAC Chapter 6, §002.02A.2e.

☐ All learning objectives that meet the requirements of 298 NAC Chapter 6 § 002.02A.2d.

☐ A record retention policy that requires that a record of attendance for each activity is maintained for a period of at least five years.

☐ An instructor policy that requires the use of instructors who meet the requirements of NAC Chapter 6, § 005.

☐ An attendance policy that meets the requirements of 298 NAC Chapter 6, §002.02A.2h.

☐ A timed outline/activity matrix that accounts for the general flow and recommended time spent on topics contained within the activity and reflects hours of credit per topic.

☐ If applicable, a closed-book final examination proctored in person or remotely by an official approved by the education provider that meets the requirements of 298 NAC Chapter 6, § 003.02A.2f. Bio-metric proctoring is acceptable. The examination may be written on paper or administered electronically on a computer workstation or other device. Oral exams are not acceptable.

Distance Education Continuing Education Activities

If *Asynchronous, or Hybrid (in which the learning environment includes Asynchronous interaction)* is selected under CONTINUING EDUCATION ACTIVITY INFORMATION, education activity includes:

☐ A closed-book final examination.

OR

☐ Prescribed activity mechanisms required to demonstrate knowledge of the subject matter.

If *Asynchronous* or *Hybrid (in which the learning environment includes asynchronous interaction)* is selected under CONTINUING EDUCATION ACTIVITY INFORMATION, evidence of delivery mechanism approval from one of the following sources:

☐ The Appraiser Qualifications Board of The Appraisal Foundation.

OR

☐ An organization approved by the Appraiser Qualifications Board of The Appraisal Foundation that provides approval of activity design and delivery (Secondary providers must have approval under own name). IDECC/ARELLO are acceptable.

OR

☐ Is conducted by an accredited college, community college, or university that offers distance education programs and is approved or accredited by the Commission on Colleges, a regional or national accreditation association, or by an accrediting agency that is recognized by the U.S. Secretary of Education, that awards academic credit for the distance education courses or that maintains an education delivery program that approves activity design and delivery that incorporate interactivity (If no closed-book final examination is included, evidence of prescribed activity mechanisms must be submitted with the application) **AND**

☐ The activity provides interaction in a reciprocal environment where the student has verbal or written communication with the instructor.

Instructor Information

An instructor is an individual who is responsible for ensuring that the activity content is communicated to the activity's audience as presented to the Board for approval, and that the activity contributes to the quality of valuation services provided to the public. An individual who communicates assigned materials or a portion of activity content under the authorization of the education provider, but is not responsible for the activity content, is not an instructor.

If reporting more than two instructors for the activity, submit the form titled, "Supplemental Instructor Information for Education Activity Application" at https://appraiser.ne.gov/Education/

Instructor Name: _____

| Last | First | Middle |

Email Address: _____   Area Code + Phone Number

Is the instructor a Nebraska real property appraiser or hold an appraiser license, registration, or certification in any other jurisdiction?   ☐ Yes   ☑ No

Is the instructor an AQB Certified USPAP Instructor by the Appraiser Qualifications Board of The Appraisal Foundation? *Required if the activity is a seven-hour National USPAP Update Course*   ☐ Yes   ☑ No

An instructor for any continuing education activity must satisfy at least one of the following qualifications: *Select one option only*

☑ Hold a bachelor's degree in any field and have at least three years of experience directly related to the subject matter to be taught;

☐ Hold a master's degree or higher in any field and have at least one year of experience directly related to the subject matter to be taught;

☐ Hold a master's degree or higher in a field that is directly related to the subject matter to be taught;

☐ Have five years of real property appraisal practice teaching experience directly related to the subject matter to be taught; or

☐ Have seven years of real property appraisal practice experience directly related to the subject matter to be taught.

Instructor Name: _____

| Last | First | Middle |

Email Address: _____   Area Code + Phone Number

Is the instructor a Nebraska real property appraiser or hold an appraiser license, registration, or certification in any other jurisdiction?   ☑ Yes   ☐ No

Is the instructor an AQB Certified USPAP Instructor by the Appraiser Qualifications Board of The Appraisal Foundation? *Required if the activity is a seven-hour National USPAP Update Course*   ☐ Yes   ☑ No

An instructor for any continuing education activity must satisfy at least one of the following qualifications: *Select one option only*

☑ Hold a bachelor's degree in any field and have at least three years of experience directly related to the subject matter to be taught;

☐ Hold a master's degree or higher in any field and have at least one year of experience directly related to the subject matter to be taught;

☐ Hold a master's degree or higher in a field that is directly related to the subject matter to be taught;

☐ Have five years of real property appraisal practice teaching experience directly related to the subject matter to be taught; or

☐ Have seven years of real property appraisal practice experience directly related to the subject matter to be taught.

Exhibit #1

General Requirements

1. The Board may at any time conduct an audit of any approved education activity to verify that the activity is being conducted in accordance with the Real Property Appraiser Act and Title 298 as approved. If requested, electronic access will be provided to the Board for any approved online education activity. The electronic access must provide administrative rights that allow for access to the activity, quizzes, and examinations, without having to take the distance education activity in sequential order and without having to take quizzes to examinations to proceed with the activity.

2. The Board may at any time review activity and instructor materials approved by the Appraiser Qualifications Board of The Appraisal Foundation through its Course Approval Program to verify that the activity and/or instructor(s) meets the requirements of the Real Property Appraiser Act and Title 298 as approved.

3. Approval of activities does not transfer from one education provider to another, unless one education provider obtains the legal rights to all activities of another education provider. The expiration date of any continuing education activity will remain the same as approved under the previous education provider.

4. Education providers and instructors will comply with the Nebraska Private Postsecondary Career Schools Act, NEB. REV. STAT § 85-1601, et seq. as applicable.

5. Knowingly offering or attempting to offer a qualifying or continuing education activity as being approved to a real property appraiser or an applicant, without first obtaining approval of the activity, except for activities required by an accredited degree-awarding college or university for completion of a degree in real estate, if the college or university had its curriculum approved by the Appraiser Qualifications Board as qualifying education is a violation of Neb. Rev. Stat. § 76-2238(21).

6. Any continuing education activity must contribute to a credential holder's development of real property appraiser related skill, knowledge, and competency in any one or more of the following subjects:

    (1) Real property appraisal practice,
    (2) Valuation methodology and/or techniques,
    (3) Market fundamentals, characteristics, conditions, and analysis,
    (4) Real property concepts, characteristics, and analysis,
    (5) Communication,
    (6) Arbitration, dispute resolution
    (7) Ethics and standards of professional practice, USPAP
    (8) Valuation Bias, fair housing, and/ or equal opportunity
    (9) Land use, planning, zoning

    (10) Management, leasing, timesharing,
    (11) Property development, partial interests,
    (12) Real Estate law, easements, and legal interests,
    (13) Real estate litigation, damages, condemnation,
    (14) Real estate financing and investment,
    (15) Real property appraisal-related computer applications,
    (16) Real estate securities and syndication,
    (17) Seller concessions and impact on value, and/or
    (18) Energy-efficient items and "green building" appraisals.

7. An activity in which the primary purpose is training in the use of a specific software, and not utilization of a software to improve competency in in any of the previously listed subjects does not meet the requirements for approval as a continuing education activity.

8. No activity may rely upon a textbook as the primary instructional material. Textbooks are permitted to be used as a background reference for an activity; however, textbooks will not be reviewed as the activity. All activities must contain sufficient stand-alone instructional material supporting the specific activity learning objectives.

9. An instructor for any qualifying education activity, continuing education activity, or supervisory real property appraiser and trainee course, must meet qualifications established pursuant to any other applicable law.

10. An instructor for any qualifying education activity, continuing education activity, or supervisory real property appraiser and trainee course, who holds a credential as a real property appraiser in Nebraska or any other jurisdiction shall maintain each credential in good standing in accordance with the laws of the jurisdiction in which each credential is held, not have had a credential revoked, suspended, or have surrendered a credential in lieu of disciplinary action within three years; and not have had disciplinary action taken against his or her credential that may constitute a violation of NEB. REV. STAT. § 76-2238 within three years.

11. The standing of an instructor identified on an education provider's application submitted for approval, who holds a credential as a real property appraiser in Nebraska or any other jurisdiction, may be verified through the Appraiser Registry of the Appraisal Subcommittee for the Federal Financial Institutions Examination Council.

Exhibit #1

M.9

12. Any instructor of the qualifying education fifteen-hour National Uniform Standards of Professional Appraisal Practice Course, the continuing education seven-hour National Uniform Standards of Professional Appraisal Practice Update Course, and/or the supervisory real property appraiser and trainee course, must be an AQB Certified USPAP Instructor by the Appraiser Qualifications Board of The Appraisal Foundation, be a state-certified real property appraiser in good standing, have an instructional background in real property appraisal practice education; and have a minimum of five years of real property appraisal practice experience.

13. An instructor for any qualifying education activity, continuing education activity, or supervisory real property appraiser and trainee course must satisfy the education provider's instructor policy that requires the use of instructors who meet the requirements of the Nebraska Real Property Appraiser Act and Title 298.

I hereby attest that I have included all required materials, complied with all the listed requirements, completed the submitted application in its entirety, and that all statements and materials are true and correct to the best of my knowledge and belief. I understand that, should this application be found to be incomplete, that it may be considered invalid and be returned. Furthermore, I understand that if the Board finds that one or more statements made in this application, or materials submitted with this application, are not true and correct, the Board may deny the application.

Print Name: _____   _____   _____
                              Last   First   Middle

_Ben Maxwell_____   _____
                             Signature   Date

Expiration Date and Rescinding Approval

1. Except for the seven-hour Uniform Standards of Professional Practice Update course, which expires on the date on which the approval by the Appraiser Qualifications Board expires, a continuing education activity shall expire on the date five years after the date of approval.

2. The Board may rescind approval of a continuing education activity if the Board finds:

    1) Falsification of information submitted for activity approval,
    2) A change in approval by Appraiser Qualifications Board of The Appraisal Foundation through its Course Approval Program,
    3) A change in status of the qualifications specified in Section 001.15 of Chapter 6 under which a distance education activity was approved,
    4) Substantial errors and/or deficiencies in the materials or presentation,
    5) The materials, theories, and/or methodologies are not current and/or practical,
    6) The instructor(s) responsible for the activity content and presentation do not meet the qualification specified in Section 005 of Chapter 6,
    7) The activity content and/or policies are not communicated or administered to the credential holder(s) as approved,
    8) A material violation of Real Property Appraiser Act or Title 298 by the education provider or instructor for the activity, or
    9) There is a change to a secondary provider's rights to the activity.

3. If the Board finds reason to rescind its approval of an activity, the Board will provide written notice to the education provider that includes a description of the reasons for rescinding approval found by the Board. The education provider has 60 days from the date of notice to provide a written response to the Board's notice. If the response is satisfactory to the Board, the Board will not rescind its approval. If the response is not satisfactory to the Board, the Board may rescind approval of the activity. If approval is rescinded, the education provider may file a new application for approval of the qualifying education activity, and if so, meet the requirements in place at the time a new application is submitted to the Board.

Directions

1. Complete entire application. If required information is not provided, application will be considered incomplete and may be returned.

2. Along with the application, all information requested in the APPLICATION CHECKLIST section, as applicable, must be included.

3. Mail application, fee, and supporting documentation to: NEBRASKA
    REAL PROPERTY APPRAISER BOARD
    PO BOX 94963
    LINCOLN NE 68509-4963

4. Questions or concerns may be directed to Board staff at 402-471-9015 or nrpab.education@nebraska.gov.

Exhibit #1

RECEIPT

NEBRASKA REAL PROPERTY APPRAISER BOARD

No.: **22941**   Date: May 20, 2024

Received from: Appraiser eLearning, LLC

For: CE New App

Check # **009742**

Application Fee	$	_____
AMC Registration Fee: ___ new ___ renewal		_____
AMC ASC National Registry Fee: _____ appraisers @ $25		
Reporting Year ___/___/_____ to ___/___/_____		
Review of Courses: ___ QE _/_ CE ___ CE renewal		**25.00**
Penalty Fees/Fines		_____
Fingerprint Processing		_____
Late Processing: _____ months @ $25		_____
Other: _____		_____
TOTAL	$	**25.00**

Received by: _Kari M. Lull_

M.10

with Joel Baker

Exhibit #2

Introduction to ScanToSketch

ScanToSketch is not a product – it's a feature of TOTAL for Mobile

If you have a supported device, it's just "there."

Supported devices:
    iPhone 12 Pro/Pro Max
    iPhone 13 Pro/Pro Max
    iPhone 14 Pro/Pro Max
    iPhone 15 Pro/Pro Max
    iPad Pro 11-inch — 2nd gen (2020) and newer
    iPad Pro 12.9-inch — 4th gen (2020) and newer

2

Exhibit #2

Introduction to ScanToSketch

Uses exterior measurements directly

Gives you the sketch immediately in the sketch editor

Doesn't "measure walls," but helps you place corners

Calculates to the nearest hundredth of a foot,
well beyond the ANSI requirement

3

Exhibit #2

AGENDA

Exterior Corner Scanning Workflow

Best Practice Tips and Scanning Scenarios

Accuracy, Consistency, Precision, & ANSI

Help and Instructional Resources

Interior Perimeter Wall Scanning Preview (New)

Q&A

4

Here's our agenda today.

For those of you who are new to ScanToSketch, we'll to go over a basic scanning workflow to get you started.

For those who are already using ScanToSketch, we'll review some best practices tips and go over some scanning scenarios.
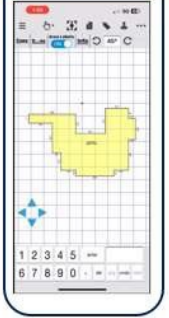
We'll also discuss accuracy data from our testing and talk a bit about the American National Standards.

Then we'll provide some help resources that you can refer to as you use this tool.

Also, today for the first time, we will be presenting a preview of our upcoming Interior Perimeter Wall Scanning feature.

And finally, at the end, we will open this up to some questions. For the sake of time, during the presentation, please keep yourself on mute and put any questions you have in the chat window. We have staff that will address the questions and then at the end, we can go over any remaining questions and even go back to any slides if needed.

M.14

Exhibit #2

ScanToSketch - Automatic Property Sketches in Minutes

| ~1900 sf 3.5 minutes | ~2500 sf 2.5 minutes | ~1000 sf 2.5 minutes | ~1400 sf 3.5 minutes | ~1500 sf 4 minutes | ~2100 sf 2.5 minutes |

Currently, ScanToSketch in TOTAL for Mobile is supported on:

- iPhone 12 Pro/Pro Max
- iPhone 13 Pro/Pro Max
- iPhone 14 Pro/Pro Max
- iPhone 15 Pro/Pro Max

- iPad Pro 11-inch - 2nd gen (2020) and newer
- iPad Pro 12.9-inch - 4th gen (2020) and newer

So, what is ScanToSketch?

ScanToSketch is tool that uses the advanced technologies in these Apple LiDAR devices and will enable an appraiser to just walk around a property, scan the corners, and then it will produce an instant footprint sketch right on the device.

The sketch is yours. You get it immediately at site and you can do whatever you want with it. You can edit the sketch, add room labels to it, and even take photos right inside the sketch, which will import directly into your appraisal.

Another key advantage is that ScanToSketch is fast. A typical residential home can be scanned in under four minutes.

And our testing has shown that, with best practices, the accuracy is within an average of 1-2% variance, which we'll go more into the data later.
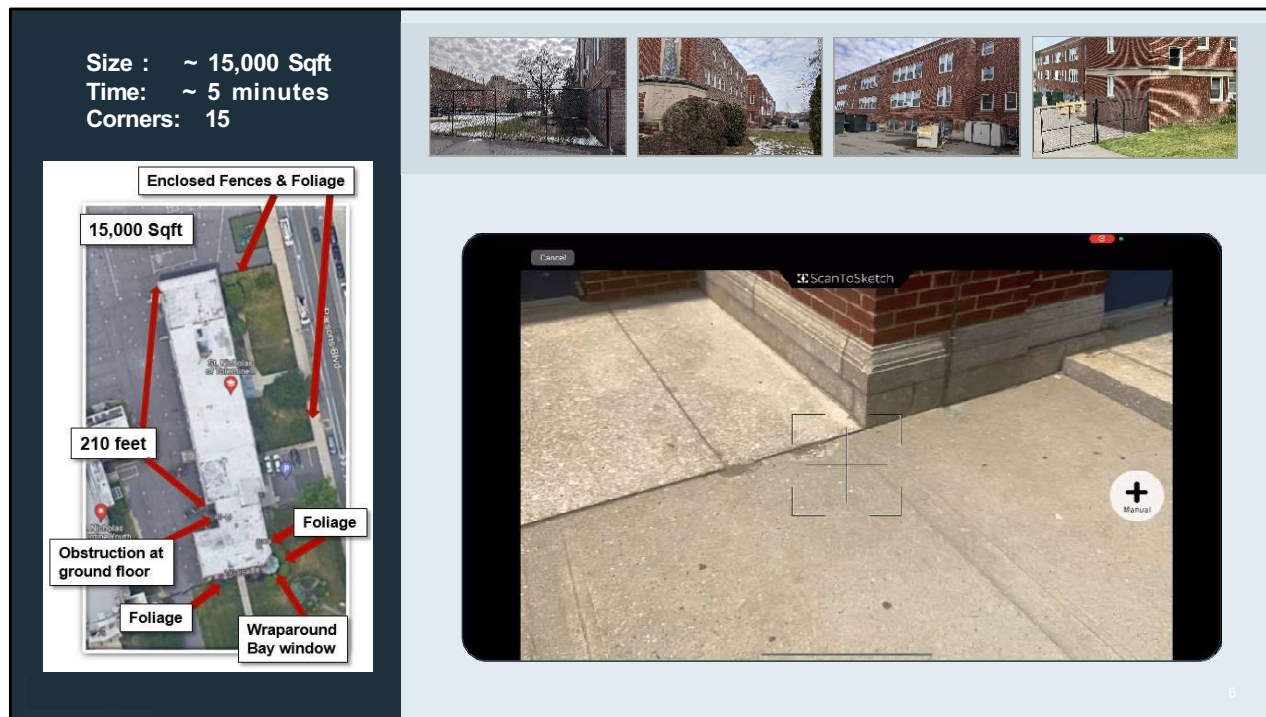
It can also handle very large and complex properties.

Here is a 15000 sf non-residential property with numerous obstructions and complications.

(Talk about obstructions)

How long would it take to measure using traditional tools? ½hour? 1 hour?

With ScanToSketch, it only took about five minutes to measure and produce a sketch.

(Click to start video)

Here is a video of a non-appraiser who has never measured a property before scanning this property in about five minutes within a 1% accuracy variance using ScanToSketch. For the sake of time, I've cut out the walking parts and just showed the corner markers being dropped. However, at the end, the popup will show the total scanning time.

LARGE BUILDINGS SCANNING TIME (<15 MINUTES)

Here are some other large and complex properties we have tested using ScanToSketch.

This third one is a 22,000 sf property with 52 corners, angled walls, wraparound bay windows, completely obstructed corners, etc. How difficult would this be to measure correctly? With ScanToSketch, this was measured multiple times with a consistency of less than 2% variance.

ScanToSketch Basic Workflow

(Exterior Perimeter Corner Marking)

8

OK, let's go over a basic workflow on how to use ScanToSketch

Scan-To-Sketch presentation   REV
4/2/2024 Joel Baker

Exhibit #2

a la mode Mobile Solution

ScanToSketch is feature built into our TOTAL for Mobile app. This is what the icon looks like to launch TOTAL for Mobile.

(Hand motion is automatic – no click needed)

Exhibit #2

As you all recognize, this is our TOTAL for Mobile app.
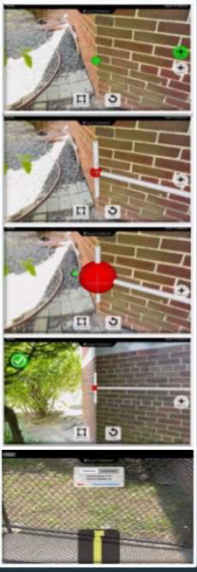
Right now, we are in the sketcher tool, where an appraiser can draw a property sketch at inspection. We have integrated ScanToSketch directly into the sketcher tool to automate the measuring and sketching process.

(Click for hand animation for S2S icon)

You launch ScanToSketch by pressing on the icon in the upper gray bar.

Exhibit #2

5 Confirmations

Green Button ⊕

- Slowly raise the iPad to aim at corner
- Move the iPad slowly up-down or left-right until a steady green dot appears precisely on the corner
- Both the green dot and the green button will appear when the corner is auto-detected
- Press the green button to drop the corner marker

If the green dot is not precisely on the corner or jumps around, pointing to the ground will reset the detection algorithm.

White Button ⊕

When the green dot is not precisely on the corner or doesn't appear at all:

- Aim the cross-hairs exactly at the corner, and
- Use the white button ⊕ to drop a manual corner marker

Green dot is not at corner

Certain colors and construction materials of walls, as well as nearby obstructions, may present problems with green dot detection.

11

Once you launch ScanToSketch, these are the buttons and graphics you will see. I will go over how to use these and then will show you a full scanning video.

(Free talk about green and white buttons)

Green Button Points:
- When you aim the device at the corner, it will attempt to auto-detect the corners and place a green dot there.
- It's best to use the auto-detection if possible, because it tends to be more accurate.
- You'll want to get the green dot precisely on the corner
- Move to the ground to reset

(Click for white button)
- When unable use white button . . .

(Click for confirmations)
Five confirmations that a corner marker has been successfully dropped:
- Corner marker will appear
- Red in the middle ball will grow and shrink like a supernova
- A green or white checkmark will appear and move to the corner
- A line will be drawn connecting the last corner marker
- The mini-map on the bottom will update with the new wall being drawn in real-time

M.21

Exhibit #2

OK, let's look a video of this in action.

(Go back to video)

Exhibit #2

(No click – video starts right away)

This is the official video we have on the website. I'm going to jump around this to highlight some key points in the workflow.

First, put your phone on "Do Not Disturb" so as to not interrupt the scan.

Second, plan your route. It's best to save the longest or most difficult to measure wall for last. This is because you are marking corners, not the walls themselves. So, once you have the last corner, you don't need to walk that last wall. In this video, there is a fence blocking that last wall so by starting at this corner and ending at the last corner in the back, ScanToSketch will measure right through that blocked wall without needing to walk it.
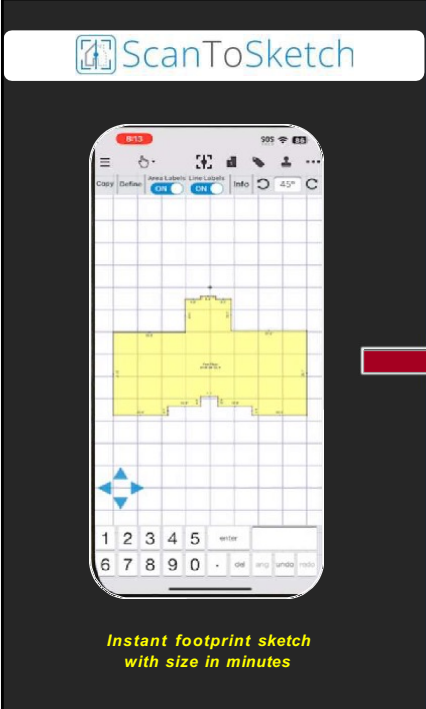
Now go to each corner, aim the device, and then drop a corner marker. Before we continue with the video, let's talk a bit about the corner markers.

(Jump to next screen, then jump back by playing video directly)
(Free talk through video)

M.23 12

Exhibit #2

Points to emphasize:
- As you're walking from corner to corner, aim the device towards the ground and just walk in a natural but steady manner. Try to walk in straight line if possible, but it's OK to walk around obstacles.
- Go around fence
- There was a question on whether you need to walk the property twice to open the gates and prepare the property for scanning. No, just once. As you will see, with ScanToSketch, you just walk naturally around the property and can walk around obstacles and open gates as you go. You don't need to keep the device pointed at the wall so you can move in a natural manner.
    - Can stop scan if necessary; flexible
    - Plan your route doesn't mean walking the property twice. Just as if you're using laser or tape, just take a quick look at the home as your driving up and plan for any problem areas. With S2S, you don't need to walk the last wall, so plan your route to take advantage of that.
- Protrusion
- Last wall – no need to walk; just need corners; ScanToSketch will measure right through the fence

Exhibit #2

The footprint sketch, **with the size**, comes into your mobile device instantly.
(Click)
Once you have the Sketch, you can **choose** to edit sketch right at the inspection or you can wait until you get back to your office and edit it on your desktop.

If all you want to do is just scan and get an instant sketch. Then that's it – you're done. Just sync back to the desktop and your sketch will be ready for you when you work on your report..

However, if you want to do more at inspection, we have some cool features on TOTAL for Mobile to help you be more efficient. Let me show you some of basic things you can do with your scanned sketch.

Exhibit #2

Here's a video that is also on our website.

(Free talk through video)

Exhibit #2

Best Practice Tips & Scanning Scenarios

OK, let's go over some scanning scenarios and best practice tips

Exhibit #2
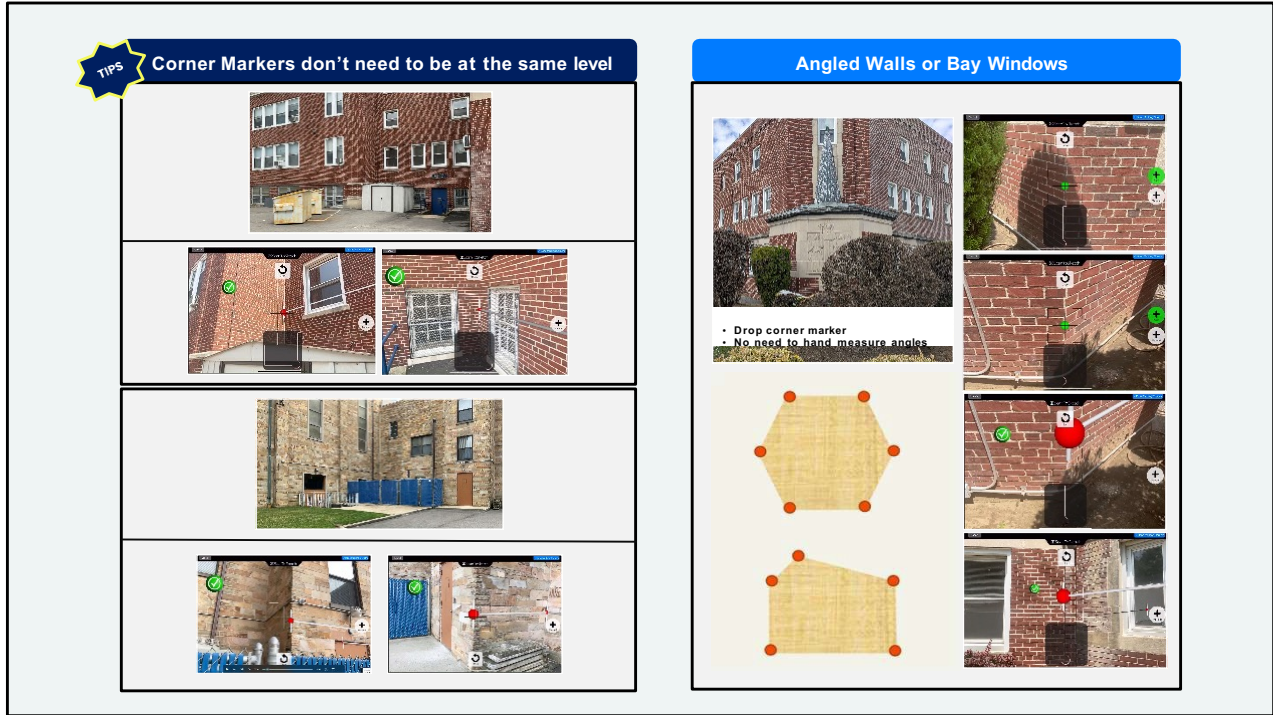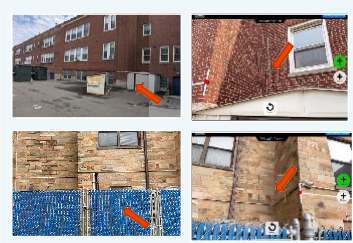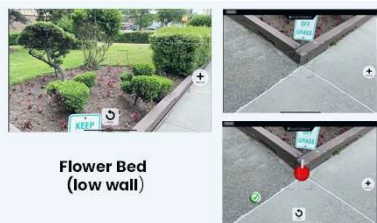
-2ⁿᵈ floor (Free talk through scenarios)
-Patio / Porch/Deck (Free talk through scenarios) - videos in the folder

We now have a new feature that gives you the ability to scan in separate areas, such as garages, porches, patios, and then merge it with your main sketch.

(Demo merging preview; come back to this screen for garage & curves – videos in the folder)

Exhibit #2

- **Click for 2ⁿᵈ floor and free talk** (give prelude to interior wall marking)

- **Click for Patio / Porch / Deck and free talk** (videos are in folder, if needed)

- **Click for Garage and Curves and free talk** (*use combined video in folder instead of PowerPoint video*)
    - For garages and curves, let me show you a larger video

(Come back and click for next slide on merging)
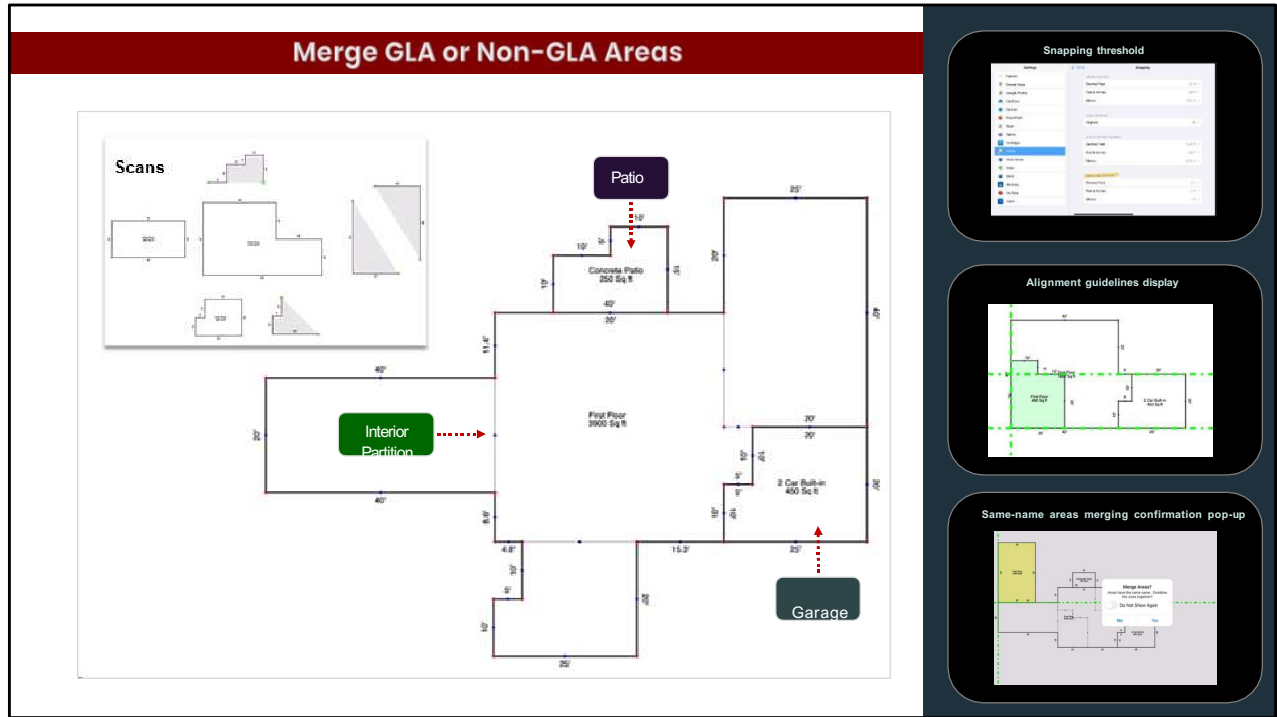
We now have a new feature that gives you the ability to scan in separate areas, such as garages, porches, patios, and then merge it with your main sketch. Here's how it works:
(Click for video on next slide)

Exhibit #2

(Video plays automatically from previous slide; talk through video)
- New snapping threshold in the settings menu
- Green guidelines
- Same name area merging confirmation

(Click for next slide)

M.31
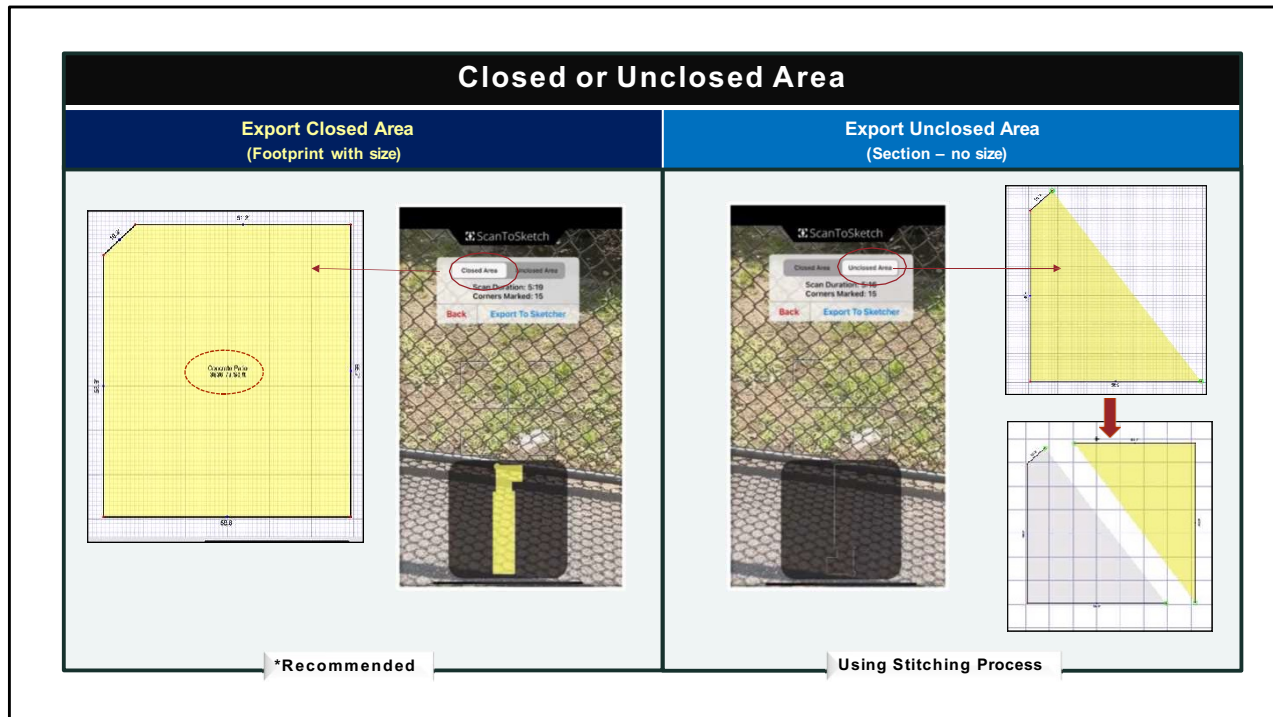
(Free talk through Closed Area)
(Click and free talk through Unclosed Area)

- If you do bring in unclosed partial scans, we provide a tool to stitch these open areas together, it's called Stitching. Here's how it works:

(Click for next slide)

M.32
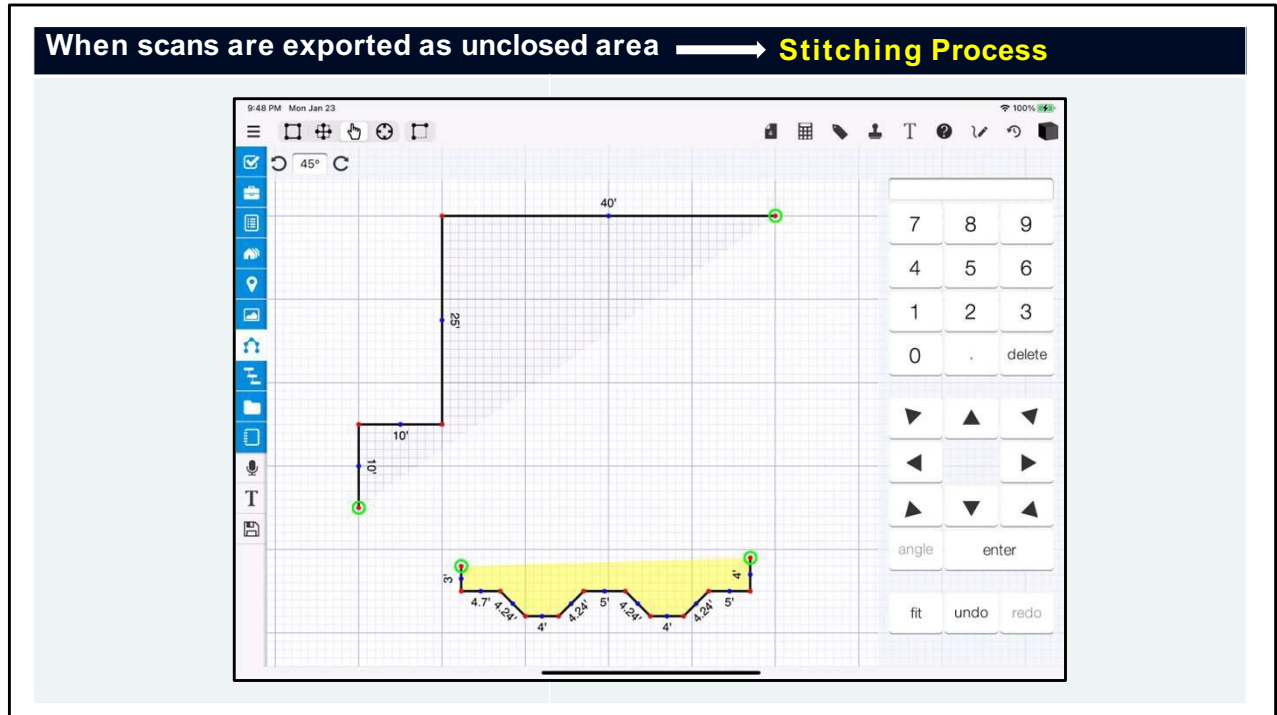
(Free talk through slide)
- Unclosed areas have green circles around the endpoints – when you drag those to touch another green circle, they will stitch together
- Delete, rotate, drag, drop, stitch, edit, auto-close with pop-points (possibly use folder video)

Exhibit #2

Interior Perimeter Wall Marking

(Click for next slide)

Exterior Corner Marking

Outside: Corners

Interior Perimeter Wall Marking

Scanning Workflow

- Identify Interior **perimeter** walls
- Choose **best** path to walk
- Mark all walls **in order**
- Start & finish at **1st wall**
  (1st wall needs to be marked **twice**)
- press ✓ Done Marking Walls
- Adjust wall **thickness**
- **Press** Export To Sketcher

(Living Room Side) (Bedroom Side)

Interior Partition

1st wall

As you all know, when using ScanToSketch on the exterior, you walk around the property and mark the corners, and then ScanToSketch will produce an instant footprint sketch of the property right on your device. Exterior corner marking remains the primary and most accurate way we recommend our customers to scan a property.

But there are circumstances where you can't scan the exterior, such as with upper floors, basements, fenced off areas, or even just inclement weather. In those cases, appraisers have to measure from the interior. And we are working on a feature to allow them to scan the perimeter from the interior and then adjust the wall thickness to get the size. But on the interior, instead of marking corners, we mark **walls**.
(Click to go to the next page to show arrows)

Exhibit #2

(Talk and click through animation)

Key points:
- Mark the interior perimeter walls only
- Can mark anywhere along the wall, even if it extends into an interior wall
- Come back and mark the first wall again to finish the scan

(Click for Why Wall Markers slide)
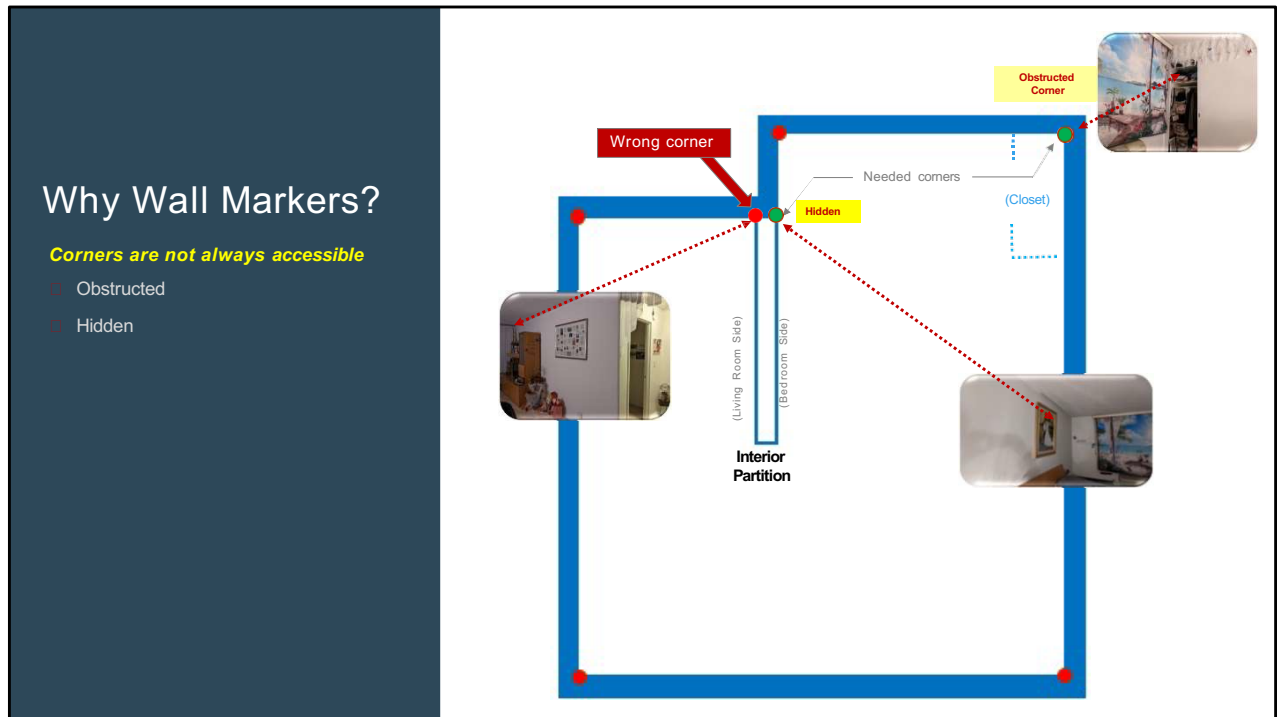
So why did we choose to mark walls on the interior instead of corners like the exterior?

It's because we've found that corners on the interior are often obstructed or hidden. Let me show you what I mean:

(Talk through animations)

So due to these issues sometimes with accessing corners on the interior, we mark the walls instead.

OK, let me show you a video of how it actually works: **(Click)**
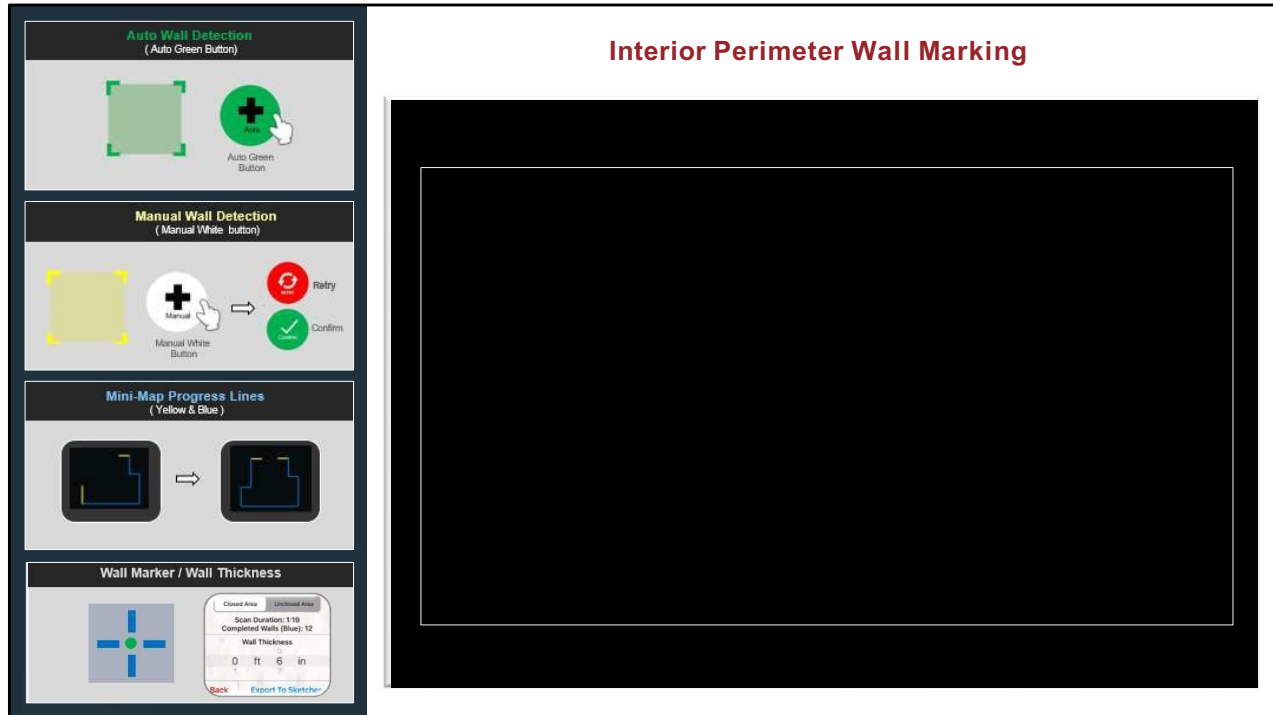
(Click quickly through four icons – no need to talk much about it) – The icons in the interior wall marking are similar to the exterior corner marking, with just some variations. And here's a video of an actual scan:

(Click to play video and talk through it)
-   Emphasize speed, not need to keep line of sight at all times, instant sketch

----

Future notes (instructor-only)
•   To start, choose the first wall to mark and then aim the device towards it.
•   When it detects the wall, a green rectangle and the green button will appear
•   Press the green button and the wall marker will be dropped
•   For the first marker, we use a unique flag, for the other walls, we use a checkmark.
   •   You can see these symbols on the right side of the screen here.
   •   These can change in the future if we decide other icons work better.
•   After marking the first wall, proceed to mark all the other walls in order.
•   Note that wall marking is actually faster and more versatile than corner marking. This is because you don't need to go to the exact corner but can mark any part of the wall that is visible.
•   Point, detect, click

Exhibit #2

- Now notice another difference between interior and exterior scanning.
- Once you are done marking all the walls, go back to the first wall and tap the flag to finish the scan
- Then you are presented with an option to adjust the wall thickness to any size available.
- Once done, just press export and an instant sketch will appear right in the sketcher.

Exhibit #2

Accuracy, Consistency, Precision, & ANSI Discussion

27

Let's talk about accuracy now.

Exhibit #2

ACCURACY & CONSISTENCY ANALYSIS UPDATE (AS OF 08/08/2023)

a la mode Study	TOTAL for Mobile ScanToSketch
# of Properties Scanned/Measured	106
# of Scans/Measurements Performed	203
Average **consistency** when two or more scans/measurements are performed	1.64%
Standard deviation of consistency	1.22%
Average **accuracy** vs. baseline (laser / tape / public record)	1.49%
Standard deviation of accuracy	1.47%

We have done and continue to do extensive tests

In our testing, we have measured two things:
1) Consistency – this is when a property is scanned more than once. How close are those measurements?
2) Accuracy – this is comparing the scan vs. a baseline, such as laser, tape, or public records.

When using best practices, we have found the variance in those two metrics to be an average of 1-2%.

Now accuracy is an interesting concept because the question is, what is the source of truth? There is variance even among public records and laser measurements that are done multiple times. There have been instances where we've actually found the scan results to be more accurate than public records. We've even had betas who have sent us blueprints where the scan results were within less than 1% of variance.

M.41

28

Exhibit #2
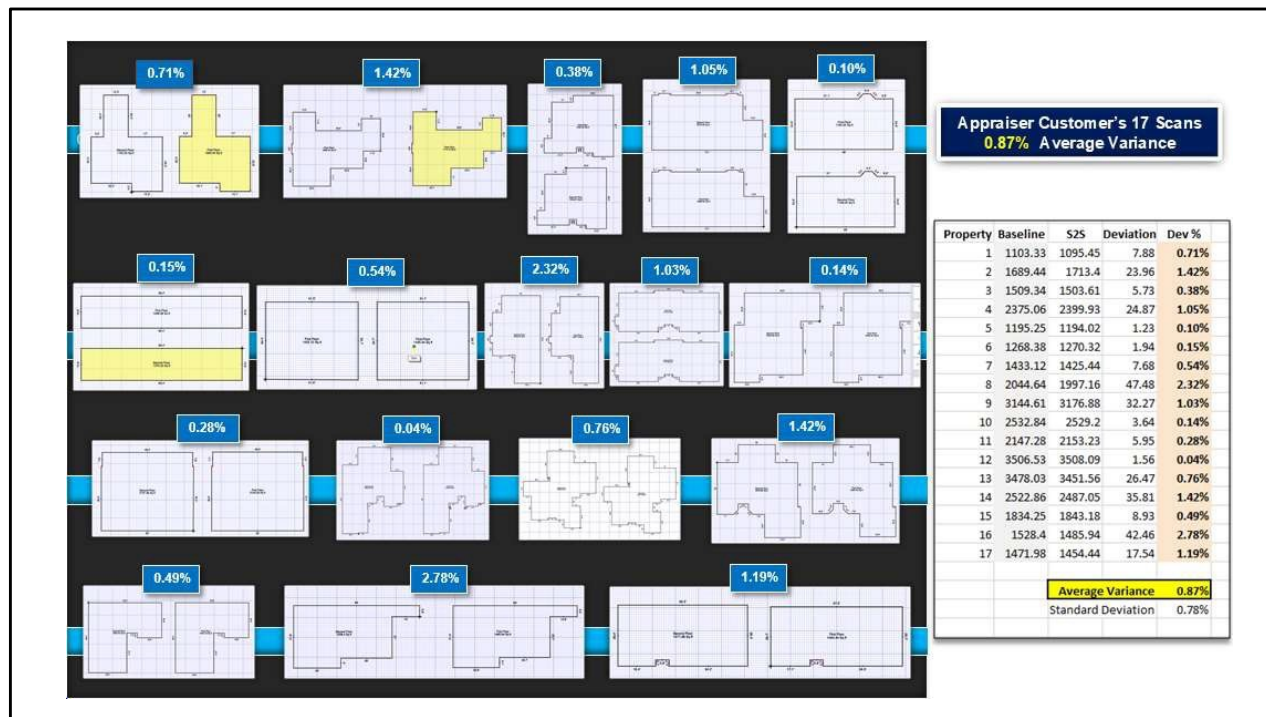
As with any technology, it's always good to test it yourself to ensure you are comfortable with its use and accuracy variance.

Here is a fantastic independent test that was done by a customer, Joe Mier, and posted online. He did a series of 17 scans and 17 manual measurements and put them side-by-side. We reached out to him to obtain a copy of the scans and did some analysis on them. As you can see, the test properties range from simple shapes to relatively complex homes. His results were very impressive – the average variance is less than 1%.

Now, of course, we're not expecting everyone to do testing as comprehensive Joe did here, but definitely do your own experimentation and comparative analysis, and then use it as you are comfortable. Remember it is just a tool in your toolbox.

ANSI

- ANSI requires a **precision** to the nearest inch or tenth of a foot; accuracy is assumed
- ScanToSketch **exceeds** ANSI standards by measuring to the hundredth, but defaults to tenth
- Appraiser determines what areas are considered GLA

We get a lot of questions on whether ScanToSketch meets ANSI standards. The answer is yes.

ANSI requires a precision of the measurement to be to the nearest inch or tenth of a foot, not an accuracy. Accuracy is assumed. It is expected that the appraiser will be as accurate as possible, but as we appraisers know, in the real world, there are variances due to human error, measuring situations, tool limitations, construction imperfections, etc.

So, adherence to the ANSI standard is verified by precision of the measurements, not accuracy. Here are the GSE guidelines provided to lenders on how to verify if an appraisal used the ANSI standard. Does the appraisal contain exterior dimensions measured to the nearest inch or tenth of a foot. So, if one appraiser has measurement of 20.3, another 20.5, and another 20.7, all three appraisals have adhered to the ANSI standard.

ScanToSketch meets and even exceeds ANSI standards in that the technology actually measures to the hundredth of a foot, but we default the display in the sketch to the tenth of a foot. If you are interested in seeing the measurements to the hundredth, you can change the settings to do so.

In regards to what areas are considered GLA (above/below grade, ceiling height, etc.) that

M.43

30

would be determined by the appraiser, not the measurement tool.

Exhibit #2

Help and Instructional Resources

31
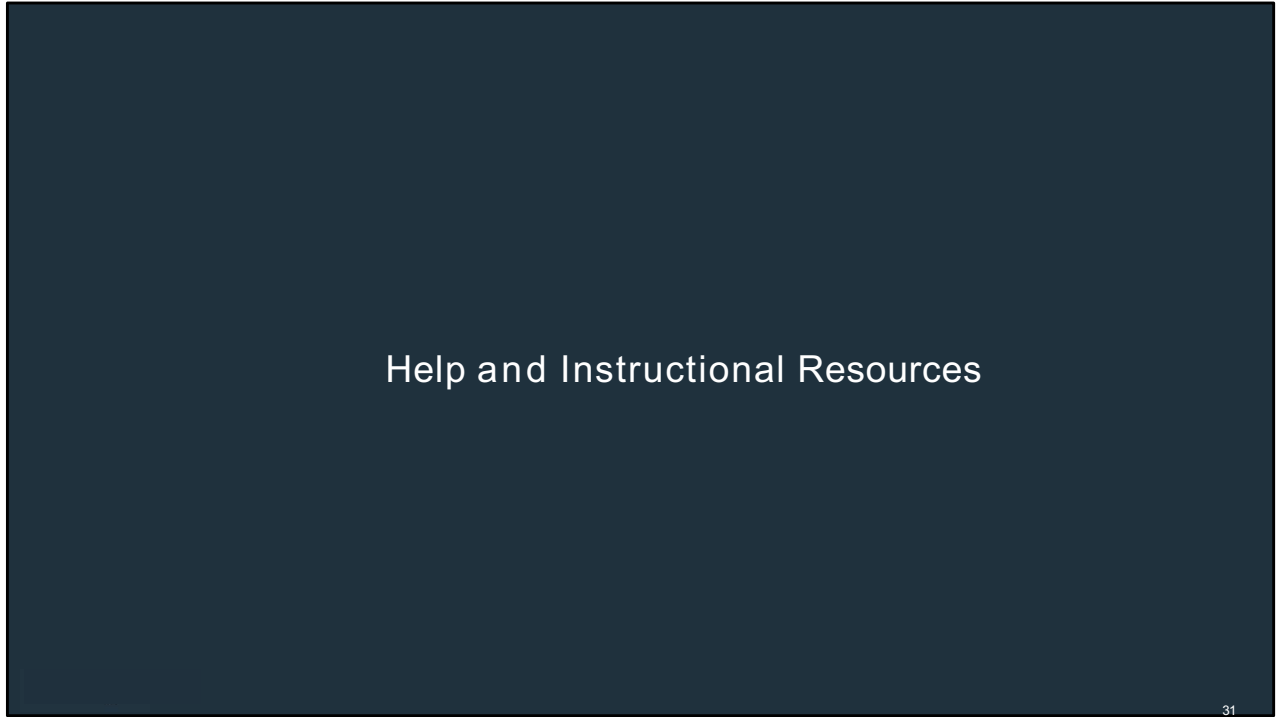
OK, here are some help and instructional resources available

TOTAL for Mobile Sketcher In-App Help Button

(Free talk)

Exhibit #2

(Free talk)

Exhibit #2
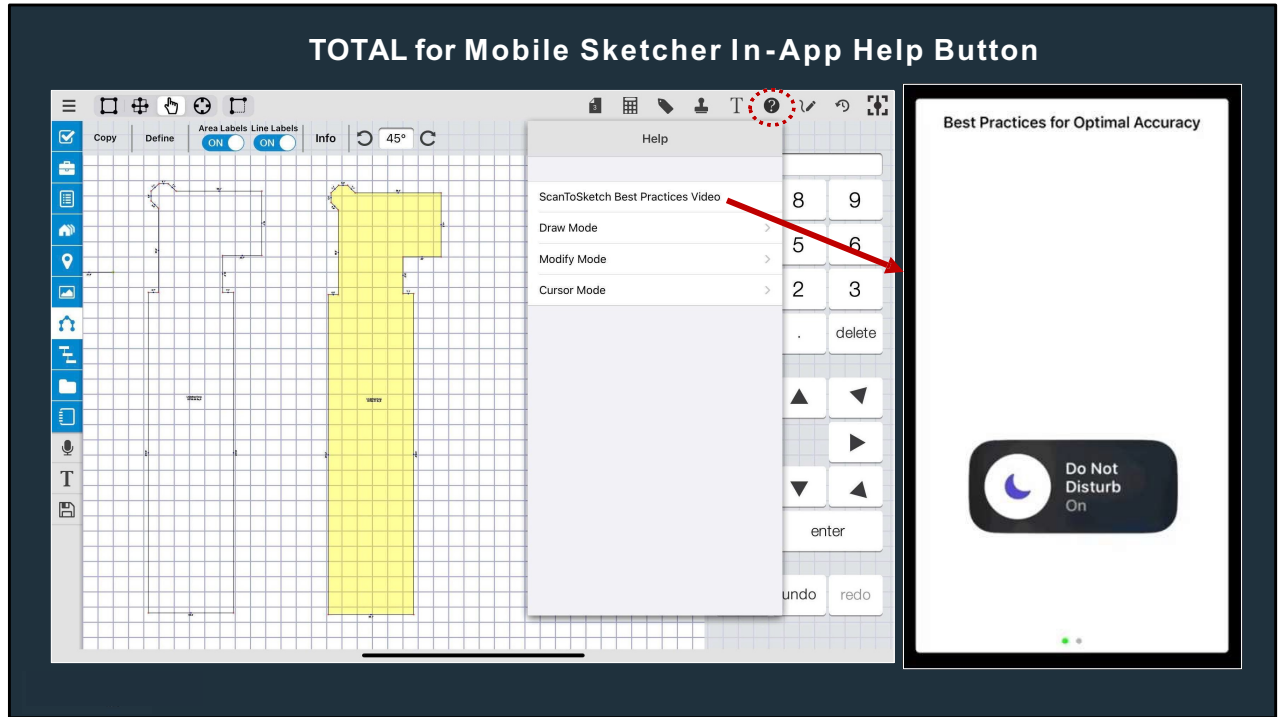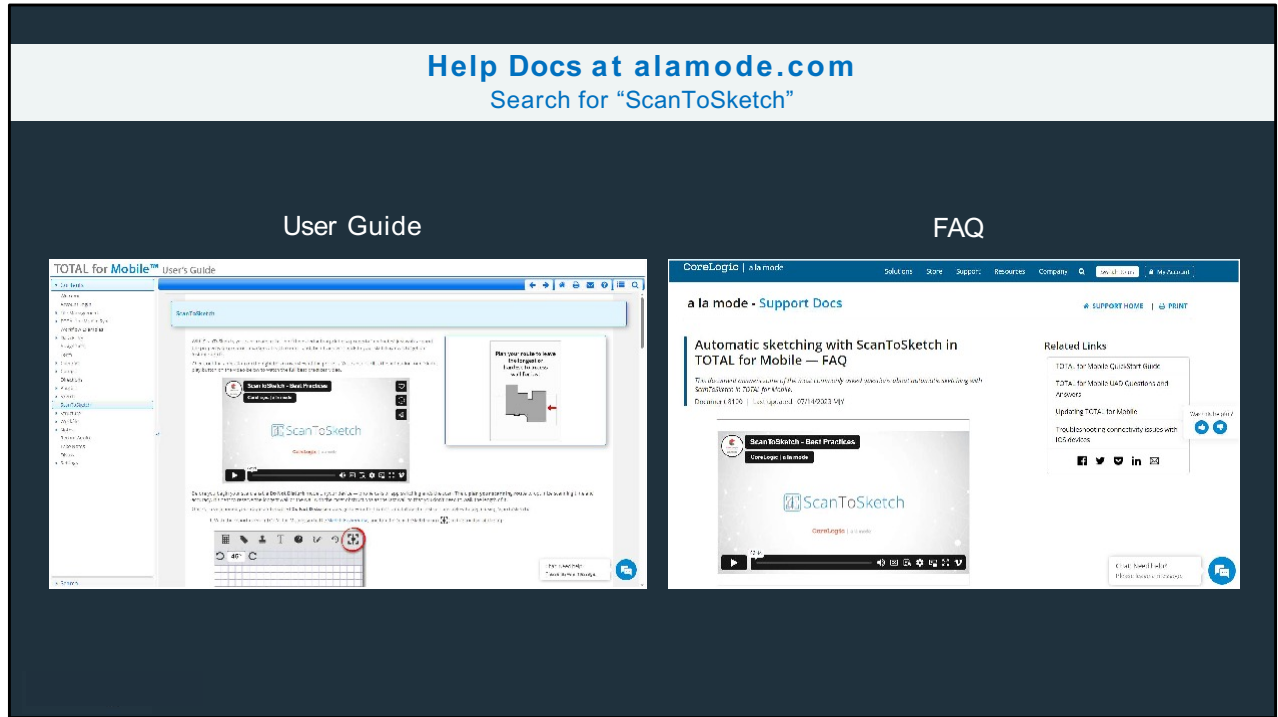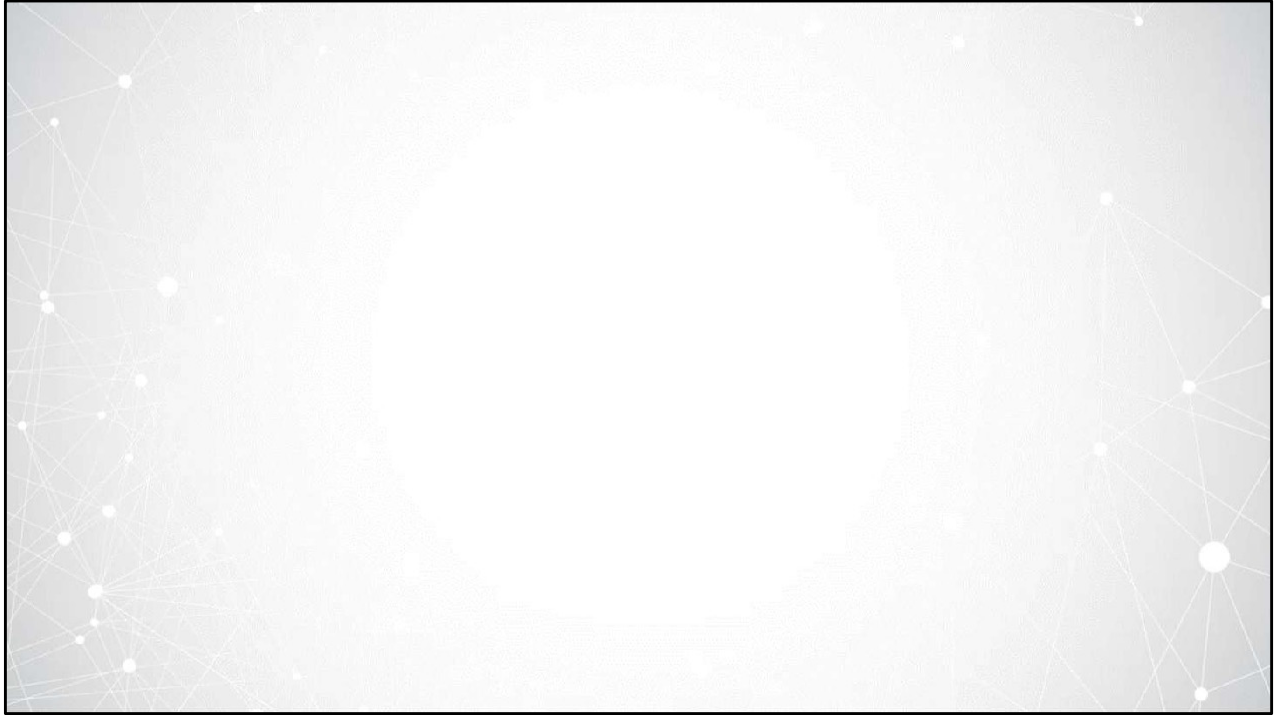
And that is our presentation of ScanToSketch. Thank you all for your time and now we're ready to take some questions.

Exhibit #2

The Practical Application of Mobile Appraising

Exhibit #2

Presented by

Appraiser eLearning, LLC

3314 West End Avenue, Suite 102

Nashville, TN 37204

Contact: Ben Maxwell

This course delivers a detailed introduction to mobile appraising and the related principles. It addresses specific USPAP issues, preparation for inspection, mobile property data gathering, sketching, measuring, and reporting. The principles of mobile appraising do not change depending on specific software or mobile apps. The Appraisal Foundation makes it abundantly clear in "The Real Property Appraiser and Qualification Criteria" manual that educators are encouraged to provide instruction on methods and techniques that "Introduce and demonstrate the use of appraisal software." Furthermore, the criteria issued by The Appraisal Foundation requires that when education is used to illustrate sketching and measuring tools, such education must, "Demonstrate sketch measurement software applications using computers, tablets, handheld devices, etc. …" This course focuses on the principles of mobile appraising, but it complies with The Appraisal Foundation guidelines in demonstrating these principles using software, apps, computers, and mobile devices. This course uses TOTAL for Mobile and TOTAL by a la mode, LLC as the framework for explaining the core principles of mobile appraising.

Exhibit #2

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Exhibit #2

Schedule

Welcome! This book contains outlines for the training sessions presented over the course. In developing this material, we took into consideration the most logical sequence in which topics could be learned, and chose the concepts most likely to be used by the majority of appraisers. The principles outlined in this class are applicable to any mobile data collection application and residential report software.

Agenda

Time	Session Title	Page
50 minutes	Welcome, Keynote session with Shawn Telford	
10 minutes	-- BREAK	
50 minutes	Prepping a report for your inspection	
10 minutes	*Setting up your field report*	
30 minutes	*Building good QuickLists*	
10 minutes	*Gathering report-specific data ahead of your inspection*	
10 minutes	-- BREAK	
50 minutes	Mobile app tips for gathering data	
30 minutes	*Using your mobile device to inspect a property*	
10 minutes	*Taking and managing mobile photos and pages*	
10 minutes	*Synchronizing data between your mobile device and PC*	
	-- Lunch	
80 minutes	Accurate field sketching 101	
40 minutes	*Line drawing, angle measurement and entry, and cutting out the garage*	
20 minutes	*Drawing curves, placing symbols, page management*	
20 minutes	*Copying areas*	
10 minutes	-- BREAK	
20 minutes	Accurate field sketching 101 (Cont.)	
10 minutes	*Re-opening and adjusting existing areas, using open-to-below areas*	
5 minutes	*Drawing interior walls, room labels*	
5 minutes	*Gathering room-specific data*	
10 minutes	-- BREAK	
60 minutes	Leverage LiDAR for accurate measurements	
10 minutes	-- BREAK	
40 minutes	Mobile technology and the new UAD dataset	
20 minutes	*What is the new form and dataset?*	
20 minutes	*Real-world, field-level examples of mobile data collection of the new UAD*	
Desktop software		
420 minutes	7 hours	

Exhibit #2

What's in this book?

This book contains sections corresponding to sessions presented at the workshop. It also has valuable step-by-step instructions to help you remember what the instructor did without having to take too many notes. Remember, this is your notebook! Please feel free to mark it up as you see fit and take it with you when you return to your office.

In addition, look for these icons throughout the book:

When you see this icon, you know we have a previously published tech tip on this specific topic. You can see it again in video form at www.appraisertips.com.

This icon means that we have a tech doc available with additional useful information. Just go online to http://www.alamode.com/appraiser/support and enter the four-digit number to find it.

Important tips or details related to the topic at hand.

Asking Questions

Interaction is one of the best things about being at an in-person class. We recognize and encourage you to ask questions throughout the course of our workshop. Just raise your hand and the instructor will call on you. Productive discussion contributes to the overall success of our classes, and we would rather address questions in real-time (to a reasonable degree) than all at once at the end of each section.

It's also common for questions of a technical support nature to arise, usually prefaced with phrases like "On my system…" or "When I click on that it…" Please reserve these questions for a break. We're happy to help you individually with these issues, but want to keep our classroom time focused on what will help everyone out the most.

If a technical support representative is in attendance, seek them out during a break or after class to help you resolve these types of issues.

M.54

Session Details

Keynote and opening remarks `50 minutes`

Attendees will be able to:

- Analyze contracts and markets to determine if adjustments might be needed for concessions, as affected by the NAR settlement

- Describe the current UAD timeline and where we are within it.

- Detect and prepare for likely changes in workflow and scope.

- Analyze their appraisal report language for subjective terms and phrases.

- Identify and remove illegal and/or unethical biased terms and processes in their reports.

Getting Started with mobile appraising

Prepping a report for your inspection `50 minutes`

Attendees will learn how to correctly start a new report and set that file up with the critical data they need and then sync it to their mobile device. We'll cover important features that aid in improving speed and accuracy when gathering data in the field.

Attendees will be able to:

- Configure key data-gathering features, including QuickLists, in order to increase accuracy and consistency of information collected in the field.

- Describe the mobile app sync process.

- Demonstrate creating a report and synchronizing it with their mobile device.

- Recognize the benefits of taking potential comp addresses to the subject inspection to cut turn times and increase efficiency.

Mobile app tips for gathering data `50 minutes`

We'll cover gathering data using the mobile app and your mobile device, including using QuickLists and your voice to streamline the process and improve accuracy and consistency in your reports.

Attendees will be able to:

- Utilize the mobile app to gather data about the subject.

- Verify comp data while they're in the field.

- Demonstrate how to add photos to photo pages.

- Explain where all data gathered in the field is stored after syncing with their desktop

- Describe how to use desktop software and mobile app to share important workfile documents between desktop and mobile.

- Utilize apps on their mobile device to review and mark up MLS printout PDFs without paper.

M.55

Exhibit #2

- Manage photos and photo pages from their mobile device.

Accurate field sketching 101   `100 minutes`

Attendees will learn how to sketch both simple and complex properties from the mobile device, resulting in more accurate sketches and GLA calculations. You'll see how to gather "room specific" data for each room in a property, as well as taking photos and organizing them automatically.

Attendees will be able to:

- Explain the basic drawing modes, including exterior and interior walls, modify, and place cursor mode.

- Recognize the difference between active drawing mode and "pen up" mode.

- Demonstrate drawing of basic straight, angled, and curved lines.

- Correctly employ negative areas to adjust GLA.

- Maintain ANSI compliance for precision and area classification.

- Choose the appropriate area type definition to ensure the correct and accurate outcome of sketch calculations.

- Demonstrate re-opening an area and revising previously drawn lines without deleting large portions of their sketch.

- Illustrate what a property's specific floorplan looks like by drawing interior walls.

Leverage LiDAR for accurate measurements   `60 minutes`

Attendees will learn how the newer LiDAR technology on some mobile devices can be used to sketch floorplans and determine GLA more easily and more accurately. Another tool on the toolbelt, appraisers can stay on the forefront of real estate technology with these real-world best practices of using Scan-to-Sketch within movile app.

Attendees will be able to:

- Use Scan-to-Sketch to derive exterior property measurements using LiDAR-capable devices.

- Recognize the distinction between measuring walls and placing corners in a 3D environment.

- Place a manual corner marker when the application cannot properly determine a corner.

- Perform the most common best-practice tips for accuracy using Scan-To-Sketch

- Determine when to use interior perimeter scanning.

- Modify the interior workflow scanning to account for exterior wall thickness to maintain ANSI compliance where required.

- Merge two areas into one and apply the correct area classification for ANSI, where needed.

M.56

Mobile technology and the new UAD dataset   `40 minutes`

An overview of new UAD requirements, and how they apply to a mobile workflow. The new URAR and accompanying dataset goes live in the next year, and many aspects of mobile workflow and inspection tools will evolve to take advantage of the change.

<u>Attendees will be able to:</u>

- Explain the fundamental requirements of a dynamic dataset.

- Recognize a handful of examples of changes to the current workflow.

- Contrast property-level and room-level data distinctions between the current UAD and upcoming UAD

- Produce a sketch whose dataset indicates multiple structures.

- Originate a sketch that derives data points for the new UAD structures and amenities.

- Apply the benefits of a technology-assisted inspection (vs paper-and-clipboard) when accepting assignments for the new UAD dataset.

- Predict common workflow errors that can result from a dynamic dataset.

Exhibit #2

Prepping a report for your inspection

Exhibit #2
50 minutes
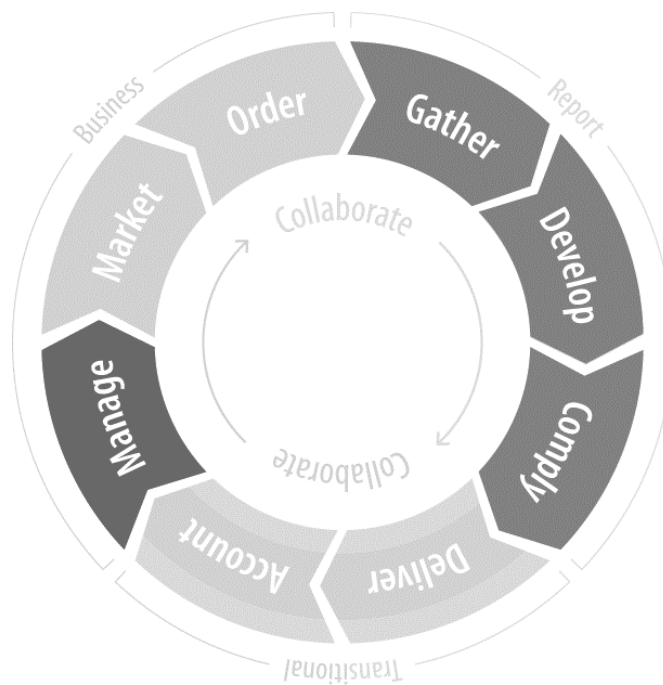
What is a template?

PRODUCTIVITY **CONSISTENCY**

Templates make your reports more consistent by automating many tasks when you start a report, from simple items like form sequence to complex things like automating addendum.

Any report in your desktop software can be used as a template. Many appraisers build their own custom versions, but your desktop software also comes with a set of pre-built templates. Either way, templates can render many of your redundant report formfilling tasks obsolete.

To create a template you simply build a report with exactly what data and forms you want, and save it into the File Manager. You could even open one of your desktop software's pre-built templates, modify it to your own needs, and save it again. Using reports as templates gives you a tremendous amount of control over what data gets saved, and what data you bring across into the new report.

Starting a report at the office

EFFICIENCY

A report can be started in a number of ways. You may have an office manager that takes care of it all for you. You may use dedicated templates. You might start every report in your desktop software yourself – or start each file in the field. Or, of course, any combination of the above.

Starting a report from a template or previous assignment

Task: Create a new report in your desktop software.

1. In the Reports panel of the File Manager, click New on the toolbar at the top of the screen.

M.59

2. In the Start a New Report screen, type the street address for the property.

3. Fill out the required Report Description. To use the property address as the report's Report Description, check the Same as property address box. If you want to include the City, State, or ZIP code in the Report Description, check the box Include City/ST/ZIP.

4. Choose which screen to view next:

- Forms PowerView – Takes you into the Forms PowerView of a new, blank, report. You can also choose from a small list of popular major forms in the drop-down menu to the right.
- Table of Contents Screen – Takes you to the Contents screen to add forms to your report from your desktop software's forms library.
- Merge Screen – Choose this option if you want to merge with a report or template.
- Assignment PowerView – Lets you set up the initial details of the report, such as client, billing, file numbers, etc.

5. After filling out the property information and choosing Merge, click OK to start the report.

6. In the SmartMerge screen, select the folder that contains the report (or "template") you wish to merge from the Folders pane on the left.

7. In the Select a source file pane, locate the report you want to merge and click to select it. You can also type a file name into the Look for: box and click Find to locate your file or use the Advanced Search to find files by proximity or multiple criteria.

8. From the SmartMerge options at the top of the screen, select Entire Report.

9. Choose to merge Forms AND data.

10. When finished, click Merge to open your new report.
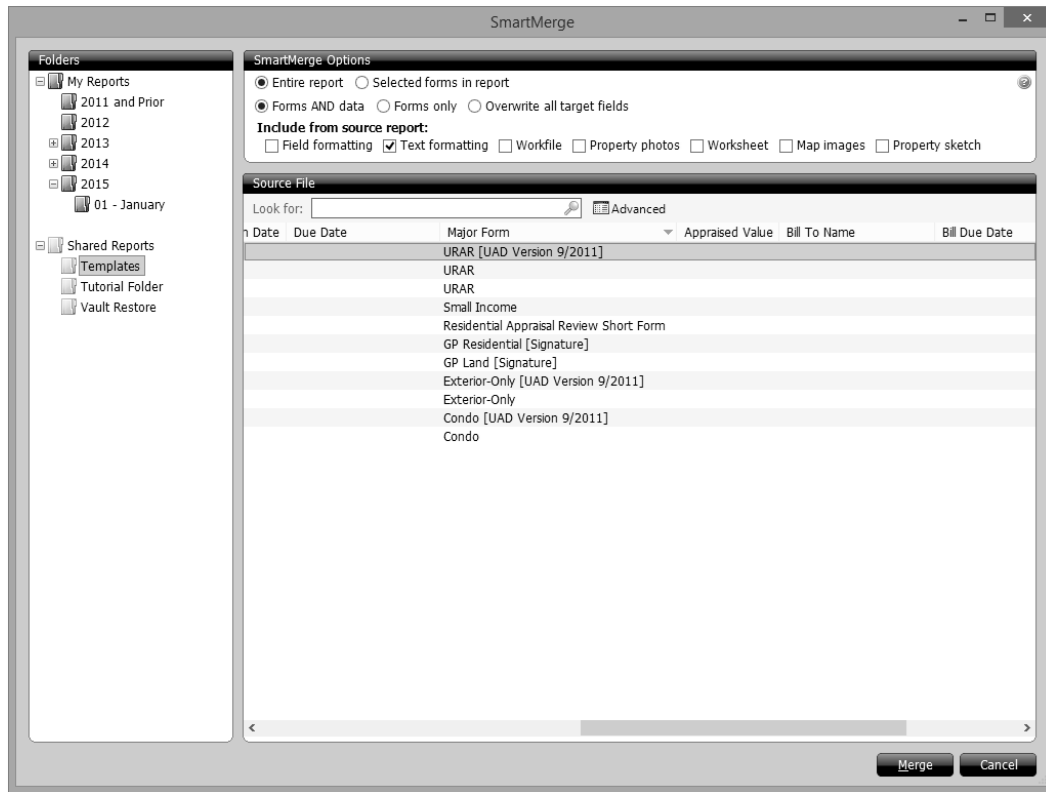
QuickLists

PRODUCTIVITY **CONSISTENCY**

QuickLists, are powerful time-savers in TOTAL, and the largest formfilling timesaver when used in the mobile app . Since they're field specific (but form agnostic), each field in your form can have a customized list of responses that don't change as you write subsequent reports. As an added benefit, you can also use most QuickList responses by typing a simple keystroke on your keyboard (so you save time by keeping your hands on the keyboard instead of reaching for your mouse) or with a single tap on your mobile device.

Using QuickLists also keeps your verbiage consistent from one report to the next.

Task: Create a single-field QuickList entry on your PC

1. Click into a field for which you want to add a QuickList entry and type a response for that field.
2. Press ALT + 0 on your keyboard or double-click the <New> entry at the top of the QuickLists pane.
3. Type a name for this entry and click OK.

M.61

Exhibit #2
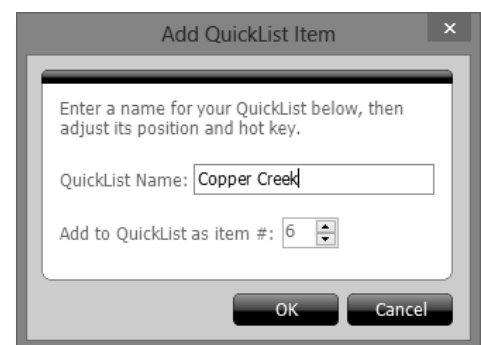
Task: Use a QuickList entry on your PC

Click a field where you want to use a QuickList response.

1. Find the QuickList entry you want to use in the QuickLists pane.
2. Notice that each entry has a number to its left, hold down the ALT key on your keyboard and enter the corresponding number beside that response. Alternatively, double-click a response to insert it into the current field.

Task: Create a multi-field QuickList entry on your PC

1. Click into a field for which you want to add a QuickList entry and type a response for that field and other related fields you want to group in the same QuickList.
2. Using your mouse or keyboard, highlight all the fields you want included in your QuickList item.
3. Press ALT + 0 on your keyboard or double-click the <New> entry at the top of the QuickLists pane.
4. Type a name for this entry and click OK. The QuickList item appears in the first field in the group you highlighted.

M.62

Exhibit #2

Prepping a report for your inspection 50 minutes

Import comp data

COMPLIANCE **ACCURACY** **CONSISTENCY** **PRODUCTIVITY**

Most appraisers have access to one or more MLS systems from which they can pull data. And historically, that meant printing and transcribing property records into the comp grid by hand. But that process is laborious and error-prone. Instead, your desktop software can help you import that data automatically into the comp grid in a fast and consistent manner. Every time you want to re-use data from your MLS, you'll be able to use the same import template, or map file, over and over.

When you're conducting your search for comps in your MLS system, remember that the results are going to be imported into a single report, not directly into the comps database. So you'll want to filter and narrow your results until you have a reasonable number of "working" comps that you can deal with in your assignment. (You'll have an opportunity later to save those comps to the database for re-use if you desire.)

Most modern MLS systems offer an option to export their property data in a common database-compatible format. When using the Import from MLS Text File function, desktop software supports both comma separated value (*.csv) files and text (*.txt) files.

6014

If you need help creating or downloading your comps into a supported file format, you'll need to contact your MLS system's support team. Many different MLS systems use different steps, and they'll be the most familiar with the process.

> *While MLS systems are the most common data source used for importing property information into a report, if your county records or other data source can export property details in a supported file format, this process will work for those sources as well.*

Exhibit #2

Once you have your comps downloaded in a file to your hard drive, you're ready to import those

properties into your report. The first time that you walk through this process, you'll need to do some configuration and "mapping" of your data to indicate to TOTAL which of your source fields should be imported into which of TOTAL's comp grid fields. In the future, you'll be able to simply re-use the previous mapping you created and the process is very quick.
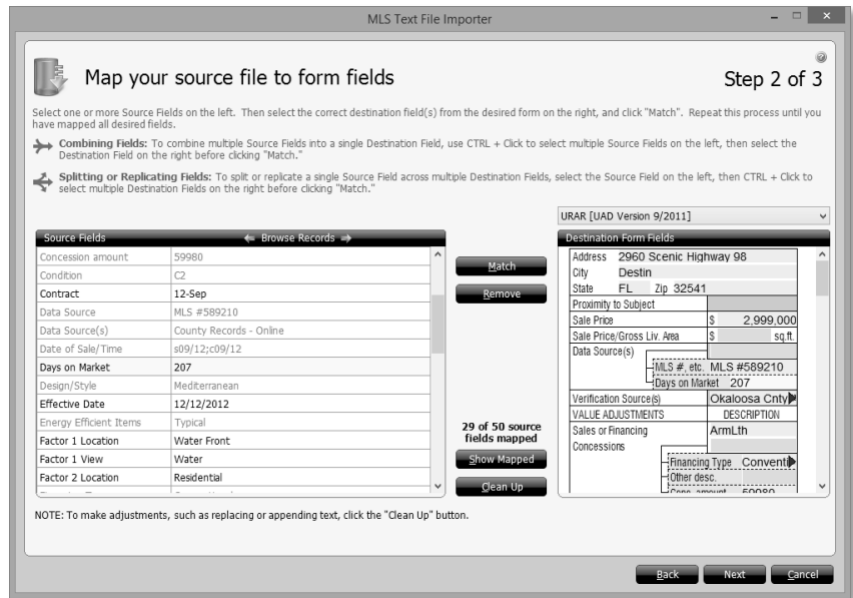
Importing Comps from your MLS (Cont.)

Task: Import properties from an MLS text file

1. From the Side-by-Side PowerView, click the MLS Text [MLS Text File] File button on the toolbar.

2. Choose a previously created template from the Select existing template drop-down, or click Add [+ Add] to create a new one.

3. Next, click Browse to select your source file you downloaded earlier from your MLS. Once you've located and selected your source file, click Open.
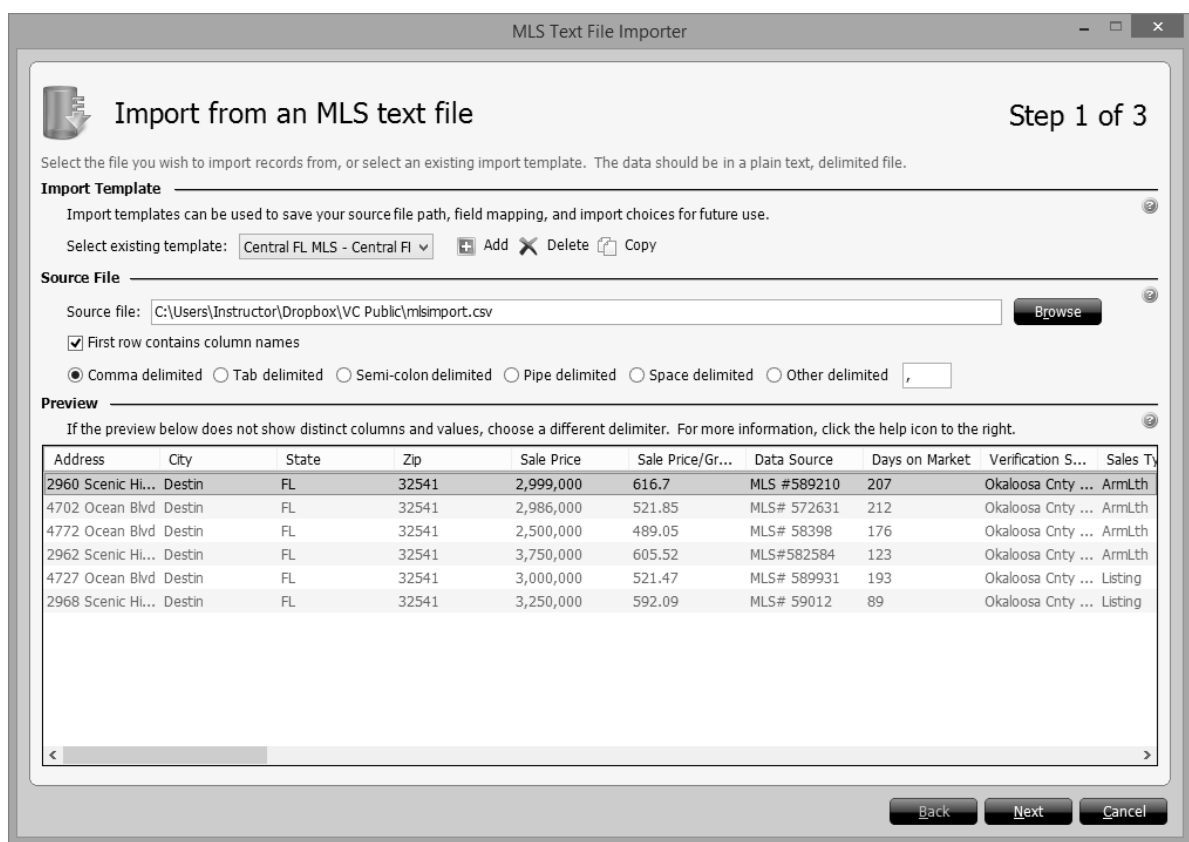
4. Verify that your source data displays correctly in the preview at the bottom of the screen, adjusting the delimiter if necessary. Then, click Next to configure field mapping.

Right   *Wrong*

M.65

5. In step 2 of the MLS Text File Importer, map fields from your source file to the appropriate destination fields within your desktop software using the form grid displayed on the right. Select a source field under the Source Fields pane, then select the appropriate field under Destination Form Fields on the right and click Match.
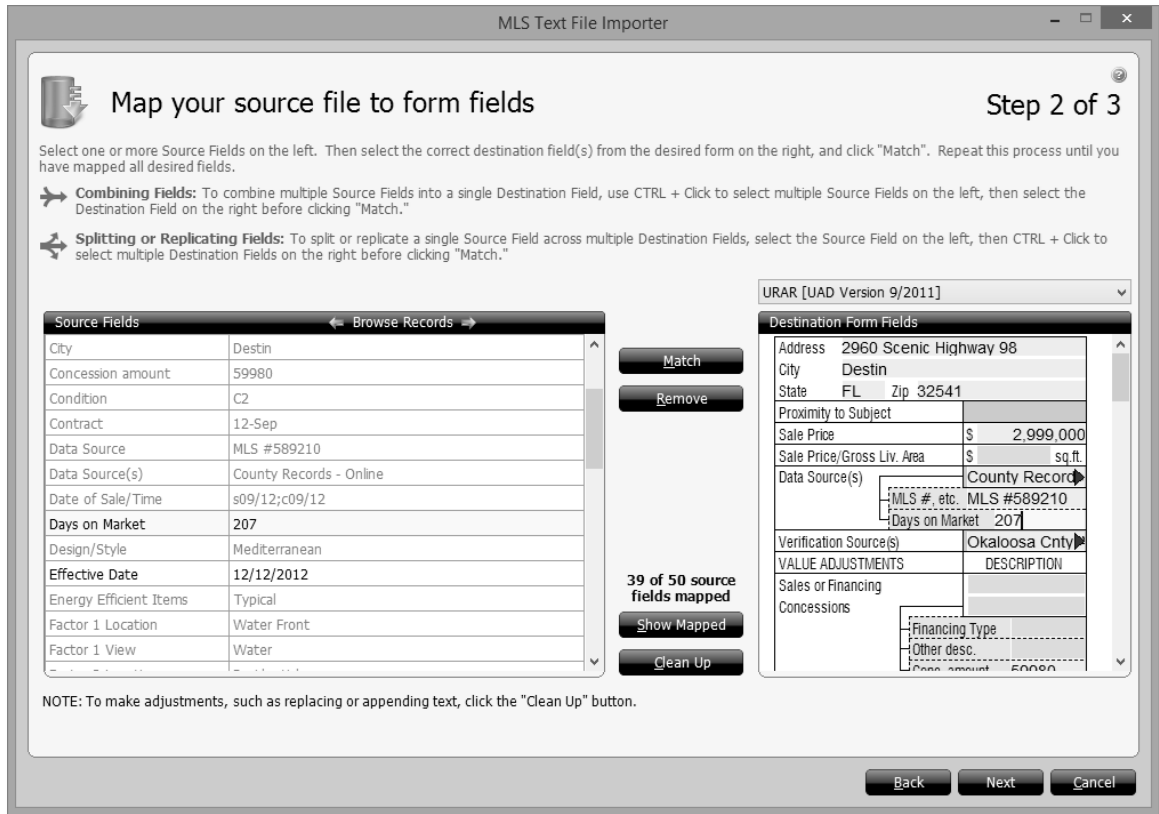
Note that you can select multiple source fields and map them to a single destination field, or multiple destination fields with a single source field. The appropriate advanced screens will be displayed when you click Match.

Task: Import properties from an MLS text file (Cont.)　　◀ COMPLIANCE ◀ CONSISTENCY

6.　Click Next to proceed.

7.　On step 3, select how you want to import property.

- The default is to import properties as a Sale into the first empty comparable grid in your report. The desktop software adds additional comp pages to your report as needed.

- Select Rental to import the property to the next available rental slot in your report.

- Select Listing to import the property to the next available listing slot in your report.

- Select Do Not Import if you decide you don't want to import a specific property.

- If you want to import all the addresses as a particular type of property, use the Apply to All drop-down to select that type of property.

MLS Text File Importer

Assign records to report slots　　　　　　Step 3 of 3

Choose report slots for your records. To apply the same choice to all records, use the "Apply To All" drop down. Sales will be placed in the first empty comparables slot of the major form. Rentals and Listings will be placed in Additional Rentals or Additional Listings. When done, click Finish to import the data into the report.

Apply To All ▾

Import To	Actual Age/Year Built	Address 1	Basement & Finished	Bedrooms Below Grade	Blank 1	City	Comparab
Sale	18	2960 Scenic Highway 98	0sf	0	Pool	Destin	Settled sal
Sale	15	4702 Ocean Blvd	0sf	0	Hot Tub & Spa	Destin	Settled sal
Sale	17	4772 Ocean Blvd	0sf	0	Pool	Destin	Settled sal
Sale	17	2962 Scenic Highway 98	0sf	0	Pool & Hot Tub	Destin	Settled sal
Sale	23	4727 Ocean Blvd	0sf	0	Pool	Destin	Contract
Sale	15	2968 Scenic Highway 98	0sf	0	None	Destin	Active

Back　Finish　Cancel

8.　Once you've selected the pages to which you would like to assign the properties, click Finish to complete the import process and add the properties to your report.

M.67

Exhibit #2

> *Remember, properties are added to the first empty slot, in the order they appear in your source file.*

Connecting your mobile device to the cloud

PRODUCTIVITY

Before moving files between the mobile app and your desktop software, you must connect to the cloud. Follow the instructions below to establish pairing:

TECH TIP

Task: Pair your mobile device with the cloud

1. Open the mobile app . From the File Manager tap in the upper left corner.

   a. For Android devices, tap here:

   ☰ 🗒 TOTAL for Android
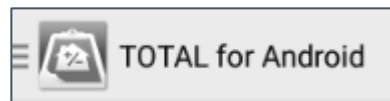
   b. For iOS devices, tap here:

   ☰

2. Tap Connect To Cloud.

3. Write down or remember the four-digit number on your screen.

   Cloud Connect

   📱 ↔ ☁ ← 🖥 WAITING

   To connect to the Cloud, you must
   confirm the connection on your desktop.

   In TOTAL, click the Dashboard button,
   open the TOTAL for Mobile Sync
   configuration and connect the device by
   entering the 4-digit code displayed below.

   9 3 9 9

   Try Again Later

4. From your computer, open TOTAL and from the Appraisal Desktop, click Dashboard in the upper right to bring up the TOTAL Dashboard.

M.68
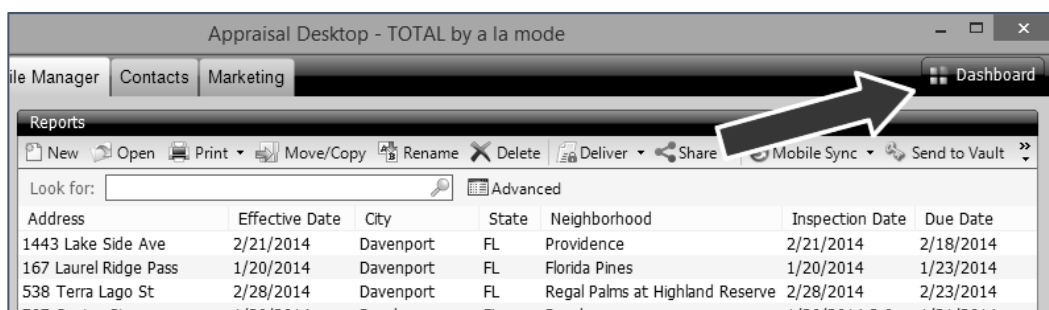
5. From the dashboard, click **Configure** under mobile app sync. If you see Install instead, first follow the instructions found online here: http://alashort.com/InstallSync
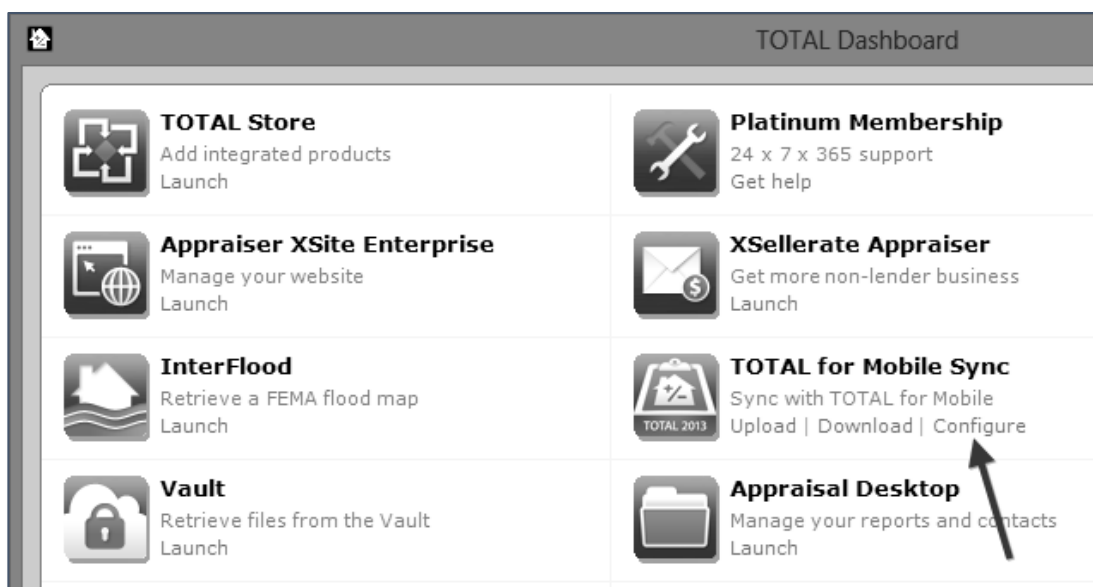
6. On the next screen, verify that your preferred QuickLists are selected, then click Connect Device.
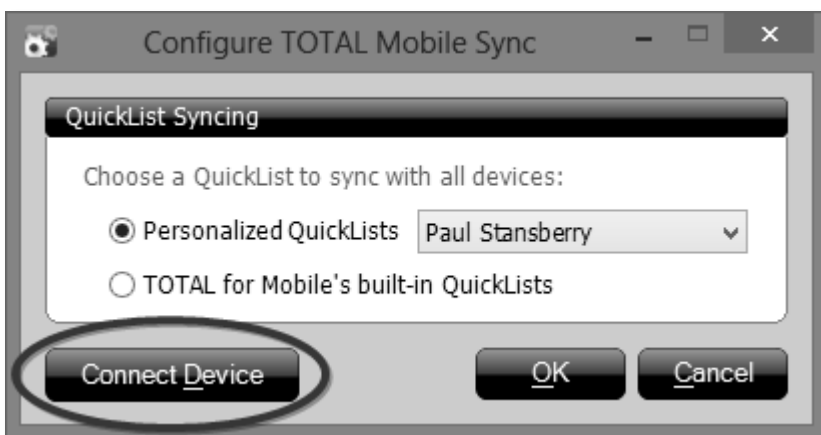
7. Enter the code you wrote down in step three here and click Connect, then click OK.

8. Upon successful connection, the iPad displays a confirmation message. Tap Done to close the confirmation box.

Exhibit #2

50 minutes   Prepping a report for your inspection

Sync a file to the mobile app

PRODUCTIVITY

If you've chosen to disable automatic syncing of files to the cloud for mobile access, you'll need to sync your files manually.

Task: Manually sync a file to the cloud for access on your mobile device

1. From TOTAL's Appraisal Desktop, select the file you want to upload.

2. In the menu above your files, click **Mobile Sync** and choose **Upload**.
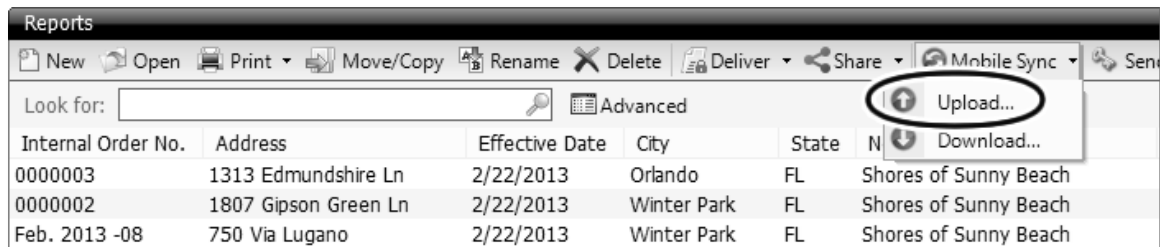
3. Your file is uploaded to the cloud.

Files in the cloud

When a file is modified in both your desktop software and the mobile app :

- Files uploaded to the cloud are the files that are available to be brought down on the app or on the desktop.

- When you download a file you are prompted to keep both or replace similarly named files.

- The last version of the file that has been uploaded, regardless of location, is the version that is available from the cloud.

Accessing reports from your mobile device

EFFICIENCY

Now that you've created your report, you'll want to sync it with mobile app to have access to it (and any included data) in the field.

By default, TOTAL syncs all new unsigned reports and the contents of your Templates folder to the cloud so that you can access them from your device.

This page
intentionally
left blank

Exhibit #2

Mobile app
tips for gathering data

Exhibit #2

90 minutes
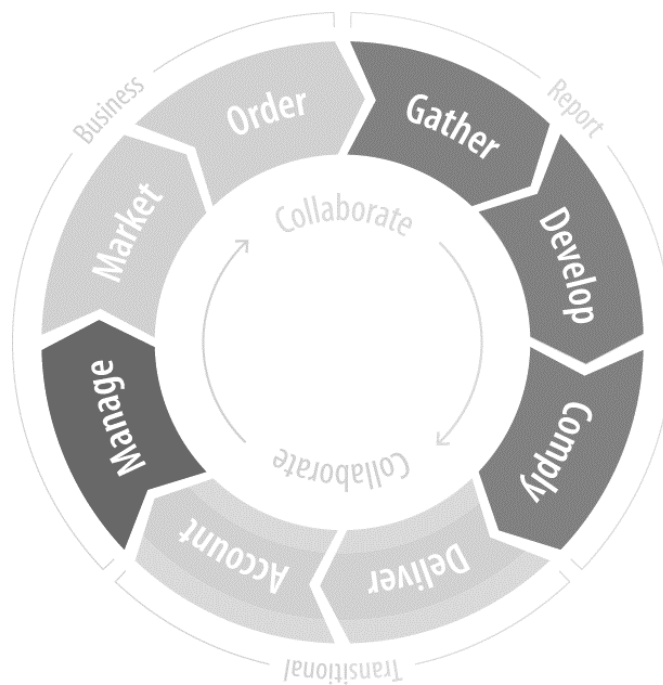
Starting a report in the field

EFFICIENCY

TECH TIP

Using templates in the field

To use a template in the field, you'll need to sync your template reports to your mobile device first.

Task: Start a report with a template in the field

Once you've synced your template report to your mobile device:

1. Tap the + icon in the upper right-hand corner of mobile app 's file manager.
2. Fill in the details on the SmartStart screen. The only required field is the report description.
3. Under the Create Report Using section, tab the box next to Report and select your template.
4. Tap Create in the upper right-hand corner.

iPad 🛜   2:10 PM   ⚹ 100% ▮

‹ Cancel   SmartStart: Start a new report   ✓ Create

PROPERTY ADDRESS

Street   1177 N Park Avenue

City   Winter Park   State FL   Zip 32789

REPORT DESCRIPTION

☒ Same as Property Address

☐ Include City/State/Zip

1177 N Park Avenue

CREATE REPORT USING

☐ Form
Start typing into this form   1004UAD   ▼

☒ Report
Copy an existing report to start with   1004 UAD [Template]   ▼

M.73

Exhibit #2

Verifying property locations

ACCURACY

If you work in a rural area and have a GPS-enabled device, mobile app can help you verify the latitude and longitude of the subject and comparable properties to ensure that they are placed correctly on your location map upon your return to the office.

By using the actual "current" GPS fixed location from your device, you'll never have incorrectly placed properties, even in areas where geocoding (the process of converting USPS address to lat/long) isn't 100% reliable.

From the **Assignment** screen, just tap **Geocode the Address,** then tap **Current GPS Position**.
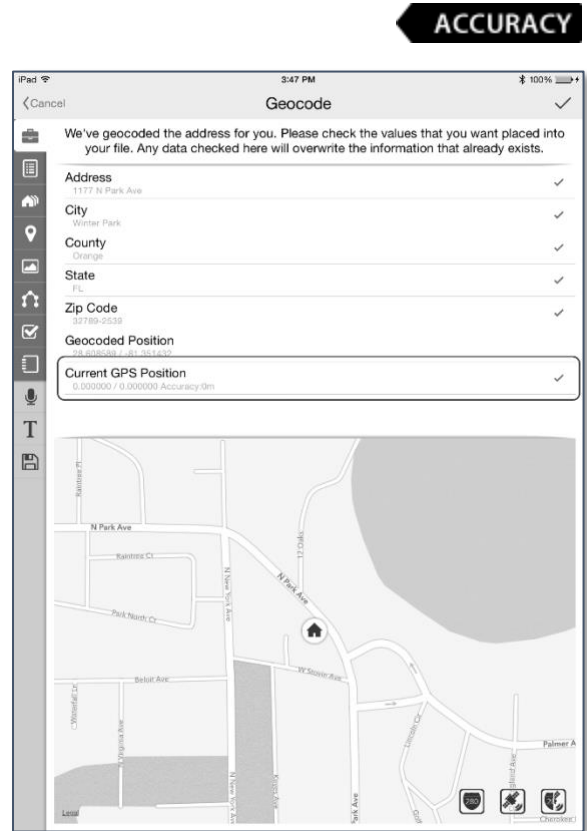
Collecting data

PRODUCTIVITY EFFICIENCY

Here's where all the hard work you put into your QuickLists pays off. With just a few taps, you can use any of your common responses from the desktop right on your mobile device in any of the data collection fields. Again, QuickLists save you time while keeping you consistent from report to report

Task: Use a QuickList entry on your mobile device

1. Tap a field name where you want to use a QuickList response.
2. Tap the QuickList entry on the left to select it.

And if you find yourself in need of a QuickList entry for something you haven't encountered before, or want to create QuickList entries for fields only available on your mobile device, it's easy to add new entries on-the-fly, right from the field.

Task: Create a QuickList entry on your mobile device

1. Tap in a field where you want to create a QuickList response.
2. Fill in the field with the data as you wish to have it stored.

3. In the QuickList panel, tap Add.

4. Verify the QuickList text and short name are correct, then tap Save.

Checklist

PRODUCTIVITY **EFFICIENCY**

When you're in the field, not all of the form applies. Wouldn't it be nice if you could filter the list of fields and only see what fields that YOU determined are important for your inspection routine?

With critical fields, you can. mobile app has a default set of critical items out-of-the-box, but it can quickly and easily be configured for your specific needs in just a handful of moments.

Creating your own custom checklist of critical items keeps you focused while on inspection, and makes it easier to see when you've missed gathering an important piece of information.

Task: Customize critical items

1. Open the critical items list view from any open report in mobile app by tapping the Checklist ☑ button.
2. Click the edit button in the upper-right.
3. Tap or un-tap your selection of critical fields. Any field marked with a check is included in the critical field view.
4. Tap the Check when you're finished.
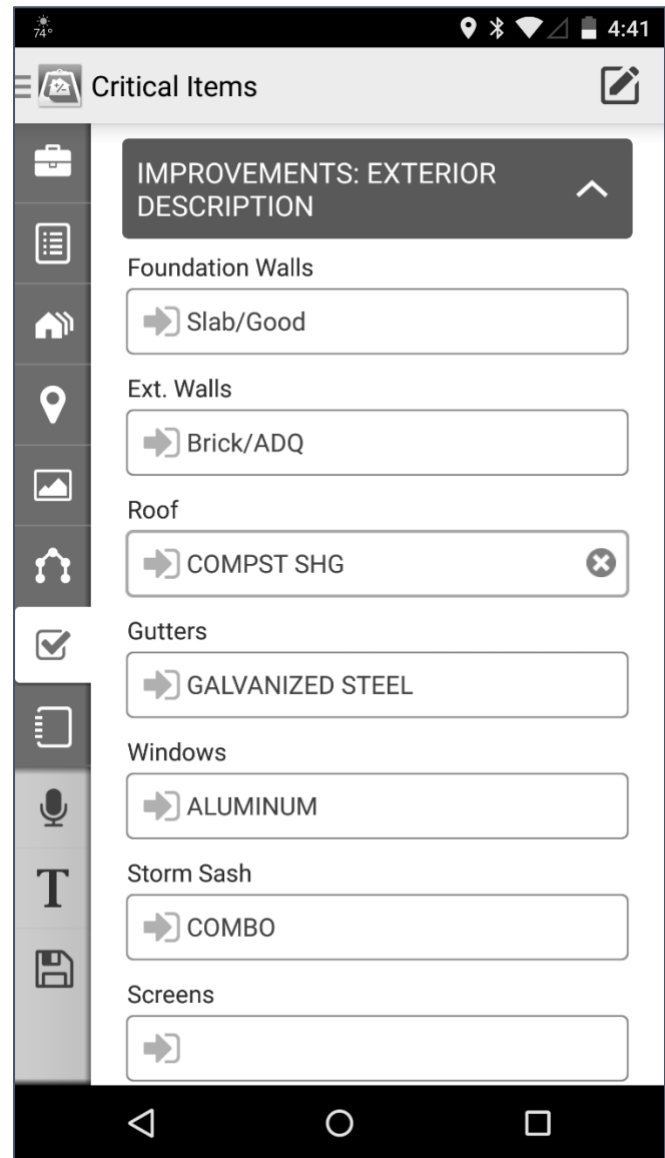
Customization you do here is retained and re-used for all future reports done on the same form type on your mobile device.

Exhibit #2

Using Mobile app 's FieldPad

◀ EFFICIENCY

As you're taking notes in the field, inevitably you'll encounter something during the inspection that can't be documented in the pre-built fields packed into mobile app or through the sketch. For those types of things that often vary from one property to the next and require lengthier explanations, Mobile app provides a versatile FieldPad you can use to take notes by hand.

Task: Take visual notes using your finger to draw:

1. In an open file, tap the ⬚ Notes icon.

2. Tap DRAW at the bottom of the screen.

3. Use your finger to draw or write on the screen as if your finger is a digital pen.

4. At any point, tap Undo to remove the last "stroke" of your finger.

5. As necessary, you can add or remove "pages" of diagrams or notes from your drawing pad.

   - To add a page to your drawing pad - Tap the plus symbol in the Tools toolbar at the top of the screen.

   - To remove a page from your drawing pad - Tap the trashcan icon in the Tools toolbar at the top of the screen and then tap Yes when prompted to confirm that you want to delete the page.

   - To flip between pages - Tap the left and right arrows in the Tools toolbar at the top of the screen.

6. When finished, tap any other view in mobile app 's left navigation bar.

M.76

Exhibit #2

90 minutes
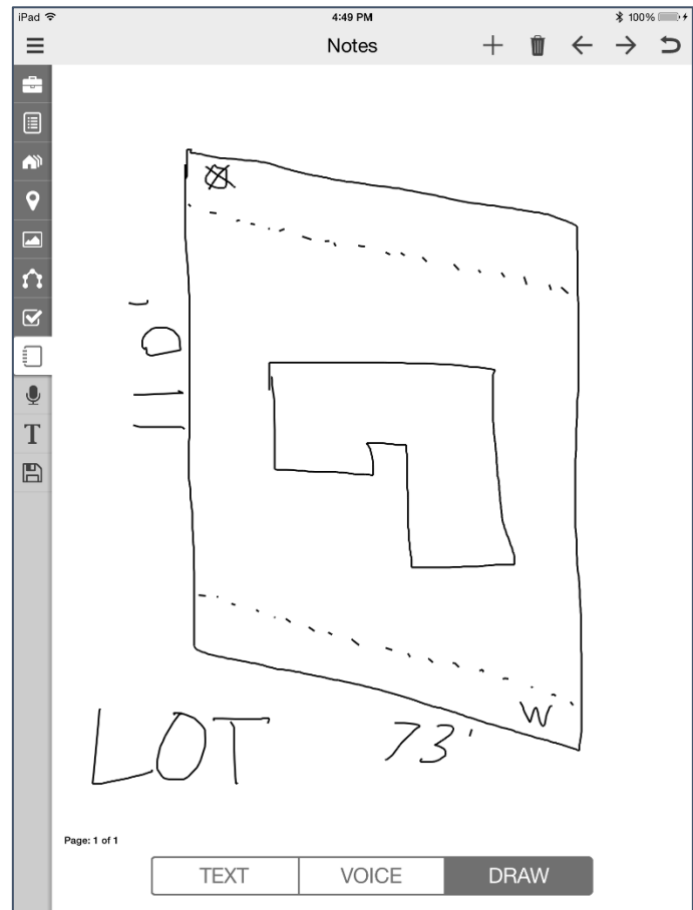
Using Mobile app 's voice recorder

EFFICIENCY

mobile app 's built-in voice recorder lets you capture voice notes in the field that you can then take back to the office and listen to as you're writing up your report. Even better, since you're syncing your mobile device with your desktop software, the recordings are archived in your Digital Workfile.

Task: Record a voice note as you're working in the field:

1. In an open file, tap the Voice 🎤 Recorder icon on the toolbar at the left.

2. TOTAL will immediately begin recording. Speak into your mobile device to record your voice notes.

3. When you're finished recording, tap the red microphone button to save your voice note.

4. To review and listen to your voice notes, tap the 🗒 Notes icon in the toolbar at the left, then tap VOICE. The list of notes will be displayed. Tap any note to play it.

5. To delete a note, tap the 📝 Edit icon in the top right of your screen, then tap the red remove icon next to the note you wish to delete.

Exhibit #2

50 minutes   Mobile app tips for gathering data
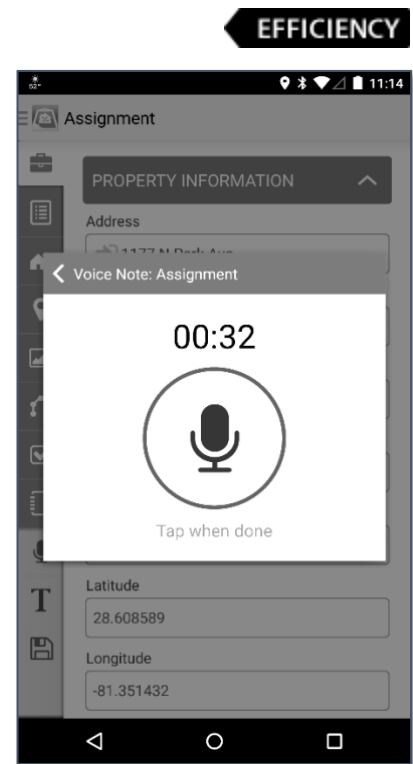
Adding photos using your device's built-in camera

ACCURACY

With mobile app , you have access to every photo page in TOTAL's library, including popular pages like the 6, 12, & 15 slot photo addenda! You can specify which image goes on which page, and even add your comments in the field, making you more accurate.

- Take as many photos as you need.
- Rearrange photos by dragging and dropping.

Task: Add a photo to your report:

1. In an open file, tap the ☒ Photos icon.

2. The first (or most recently used) photo page will be displayed. If your report contains no photo pages, tap +Add Page from the page selection menu at the top.

3. With your photo page displayed, tap the camera or gallery buttons to add a photo to your report. ☒

4. Add Description and QuickNote details as needed.

Exhibit #2

Creating QuickNotes on photos

EFFICIENCY   **COMMUNICATION**

You can use the mobile app to make QuickNotes on your images as you take them on your device. This is especially helpful when you're taking a photo and notice something you want to remember later. You simply tap into the QuickNote text field for that photo and make your note. When this report is synced back to the PC later, your note appears as a QuickNote right on the photo page.

TECH TIP

Task: Add a QuickNote to a photo in your report:

1. From any photo page, tap in the QuickNote field.
2. Using your keyboard, QuickLists, or speech-to-text, enter your QuickNote.
3. Your QuickNote will appear next to the appropriate photo in your TOTAL report after you return to your office.

Exhibit #2

50 minutes   Mobile app tips for gathering data
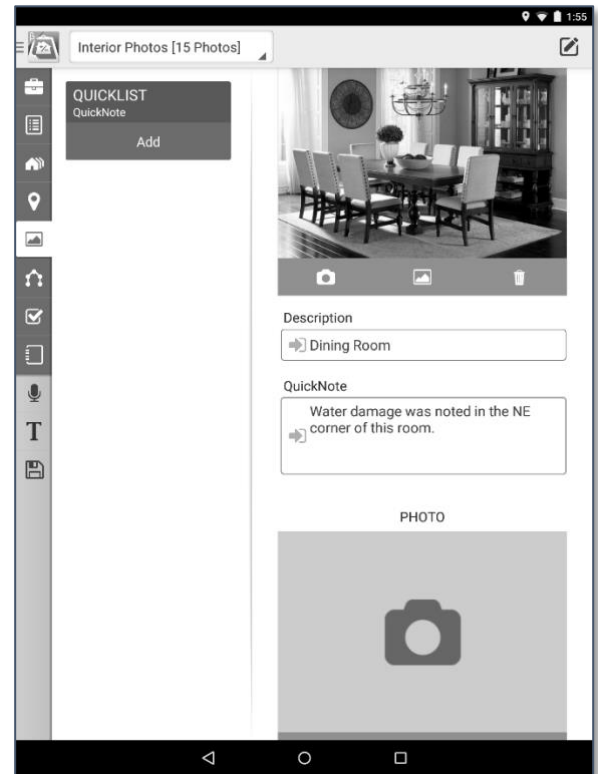
Working with comps in the field

Verifying comparable information in the field is an important part of staying compliant in your reporting. And you can use mobile app 's comparable screens to see, update, correct, and enhance the information you imported from your MLS text file. Or, if you get into the field and discover that you need to enter an all-new comp, that's quick and easy, too.

Here's a list of things you can do using the comp manager screens in mobile app :

- Verify comp data you imported from your MLS file
- Update location for rural or new addresses.
- Take comp photos.
- Take comp-specific notes that are automatically saved into your Spectrum Digital Workfile.
- Rearrange comparables.
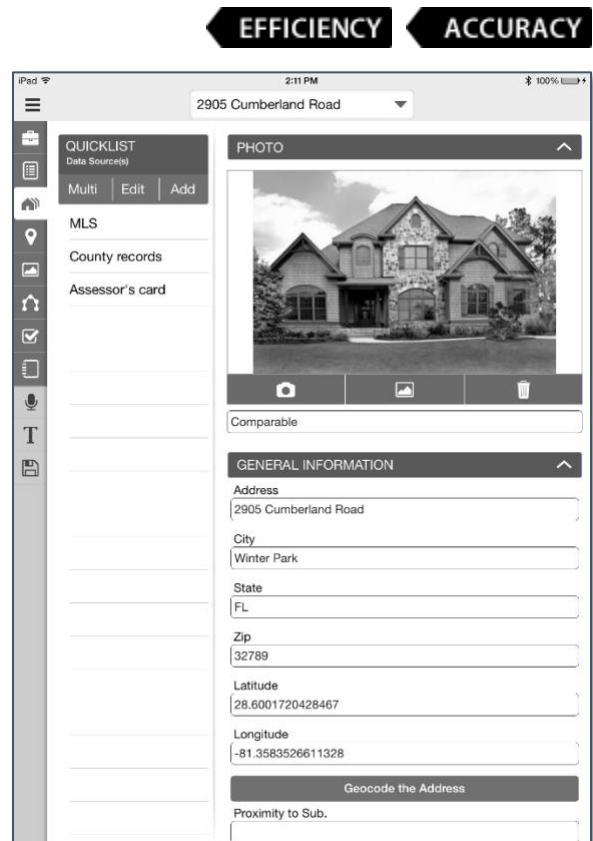
Entering notes or information for yourself

Field Notes allow you to collect additional data about a property that may not have a specific field on the form, or to enter general side notes to yourself. After synchronizing your report to TOTAL, the field notes are accessible from the report's Spectrum Digital Workfile.

Syncing a Mobile app report back to the PC

Task: Transfer a file from your mobile device back to your PC:

1. Open the mobile app , or if you have a report open, save and close the report and return to the mobile app 's File Manager.
2. From the File Manager, tap the ≡ Menu icon in the upper left.
3. In the menu that appears, tap Upload Changed Files. This detects any files that have been changed on your mobile device and uploads them to the cloud. You can also upload individual reports by tapping the status icon on the right of the report to view the report options, and tapping the Upload option.
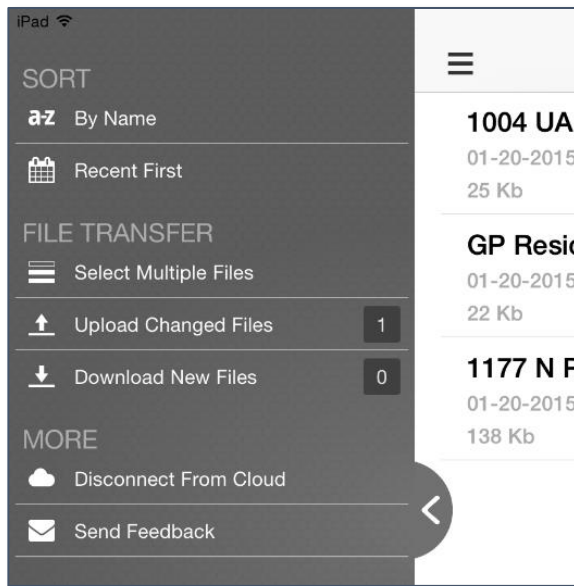
4. From TOTAL's Appraisal Desktop, click File, then click Mobile Sync, then click Download.

5. Select one or more reports to retrieve and click Download.

6. If your mobile file was originated on your PC, it is matched to its original file automatically. Just confirm the file is correct and click Import.

7. If the file was originated from your mobile device, or you wish to merge with a different file, click the option for Choose Other. When the TOTAL Data Import screen appears, choose how you want to import your report:
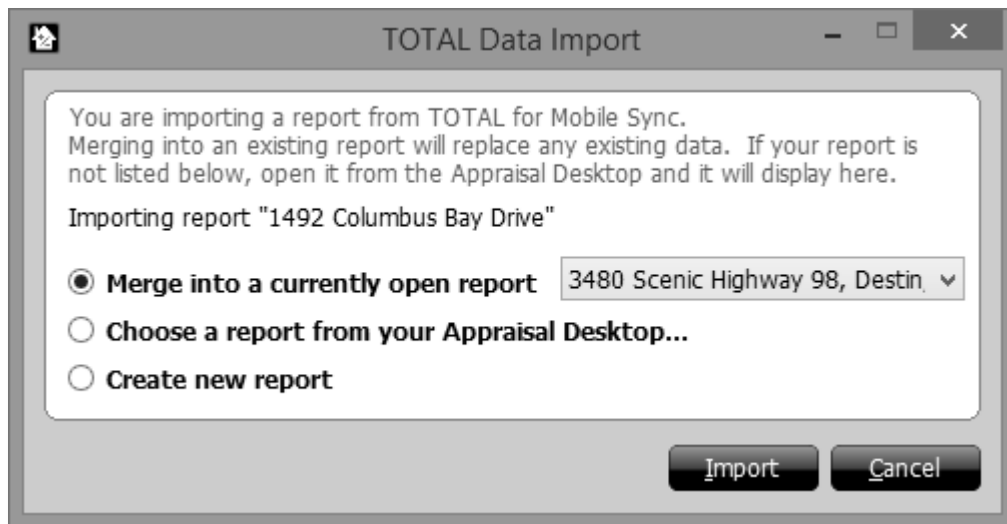
If you select to Create a new report, no further action is required. Simply click Import to open the report and add it to TOTAL's Appraisal Desktop. When you save the report later, you'll be prompted to choose a location in your File Manager for it.

Selecting the option to Merge into a currently open report presents a few additional options. Select the report from the drop down menu, then click Import. You'll be presented with these options:

- Keep the data that's already in my open report but merge everything else – This leaves the data in the selected report intact, and populates the blank fields in your report with the data from the report you are downloading from the cloud. This is the same process used when merging reports in TOTAL.
- Replace the data in my open report with the imported data – This is similar to the clone function. It overwrites all of the data in the selected report and replaces it with the data from the report you are downloading from the cloud.

Your last option is to Choose a report from your Appraisal Desktop which gives you an opportunity to merge into closed reports.

M.82

Once you have selected your import method, click Import to open the report and add it to TOTAL's Appraisal Desktop.

Reviewing your field data

COMPLIANCE

After returning from inspection, you'll want to review the data you gathered while in the field for accuracy.

Comps

Data can be reviewed in TOTAL's Side-by-side PowerView, where you can see the photos you took, and re-arrange comps into your preferred order using drag-and-drop or several new sorting options.

Remove comparables you may not need and they're stored automatically in the Spectrum Digital Workfile where they can be restored later.

Photos

Any photos you took appear on your preferred photo page in the report. If TOTAL had to add a page to your report for photos, you'll find it at the end of your report. Just drag it into the appropriate order in your report using the Report Panel in the Forms PowerView.

Voice & field notes

Voice note files are in either a *.CAF format if you're using iOS or a *.WAV file if you're using the Android version of mobile app . You'll need a copy of QuickTime installed on your computer to play *.CAF files, or you can use the Windows Media Player included with Windows to play *.WAV files.

Field Notes show as a text document.

You'll find both of these files in the Spectrum Digital Workfile.

FieldPad

After you return to your office, you'll find your FieldPad drawings appear as image files. They display in the Spectrum Digital Workfile, and can be inserted as a page in your report with a click of the Insert As Page button on the toolbar.

Sketch

If you want to make edits to your sketch, or add details like shaded areas, etc... just click the Sketch PowerView and choose Edit Sketch. TOTAL Sketch launches and you'll be able to make whatever revisions or additions you deem necessary.

Everything else

The remainder of your inspection data that hasn't populated directly into a form field or page can be found by examining the field data PDF file in your Spectrum Digital Workfile. This contains all your room specific details, as well as any information that doesn't have a specific home somewhere else in the report. Double-clicking it launches the PDF in your preferred viewer so that you can reference it as you work on your report.

Exhibit #2

Field sketching (Tablets)

Exhibit #2

Creating the sample sketch – Mobile app on a tablet

These step-by-step instructions help you keep up with the instructor during the field sketching session.

You can always refer back to these steps if you fall behind or lose track of where you are in the drawing.

Here's what the completed sketch will look like for reference as we get started.

Basics

First, a few key interface mechanisms you should know.

- Two fingers on screen moved in unison with each other pans the drawing.
- Tapping enter toggles drawing mode vs. place cursor mode.
- Tapping the fit button auto-fits the drawing to the screen.
- You can input a line direction using the on-screen arrows, or by swiping in that direction
- If your drawing action causes an un-expected result, tap the Undo button to go back one step.

Button legend

You'll use these buttons often:

Area walls	Modify	Pages	Labels	Freeform text
Free-form walls	Place cursor	Symbols	Calculations	

Exhibit #2

30 minutes

To begin

Straight lines are entered in much the same manner as your traditional desktop sketcher. Enter a dimension and tap the appropriate directional arrow on the keyboard.

1. When the sketch view opens, you're immediately ready to begin sketching. Just enter your first dimension and tap a directional arrow.

2. Enter 20, tap right, tap enter to lock in place.

3. Enter 15, tap down, tap enter to lock in place.

4. Enter 16, tap right, tap enter to lock in place.

5. Enter 5, tap up, tap enter to lock in place.

6. Enter 25, tap right, tap enter to lock in place.

7. Enter 35, tap down, tap enter to lock in place.

8. Tap the fit button to zoom out and see your sketch.
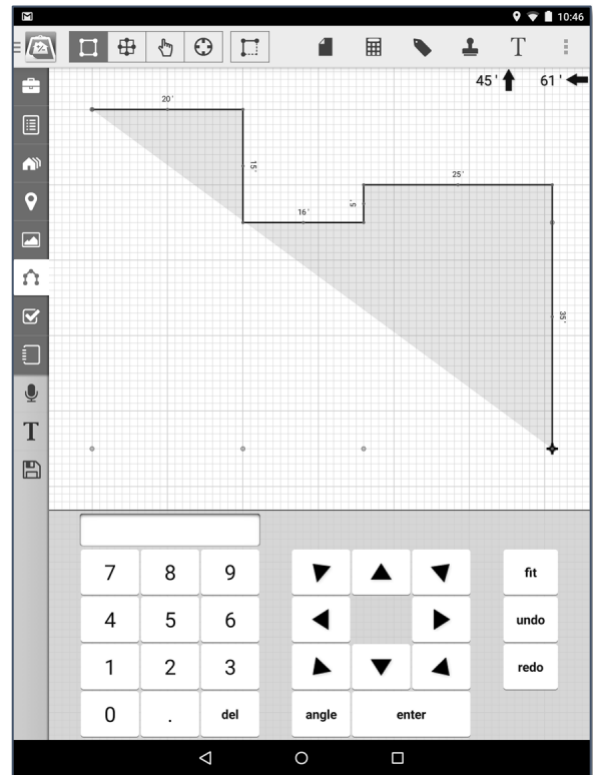
For the bay window

Bay windows use rise and run and introduces a process that allows you to adjust lines before placing them by entering multiple measurements and/or directions.

9. Enter 3, tap right, do NOT tap enter to lock.

10. Enter 4, tap down, tap enter to lock in place.

> 💡 *The line should be angled.*

11. Enter 10, tap down, tap enter to lock in place.

12. Zoom in by pinching out on screen.

13. Pan until your bay window is back in view by placing two fingers on screen and moving in tandem.

14. Tap the blue pop-point to finish the bay window.

> 💡 *Alternatively, enter 3 and tap left, then 4 and tap down, then lock*

15. Enter 10, tap down, tap enter to lock in place.

16. Enter 20, tap left, tap enter to lock in place.

17. Enter 15, tap up, tap enter to lock in place.

Exhibit #2
30 minutes
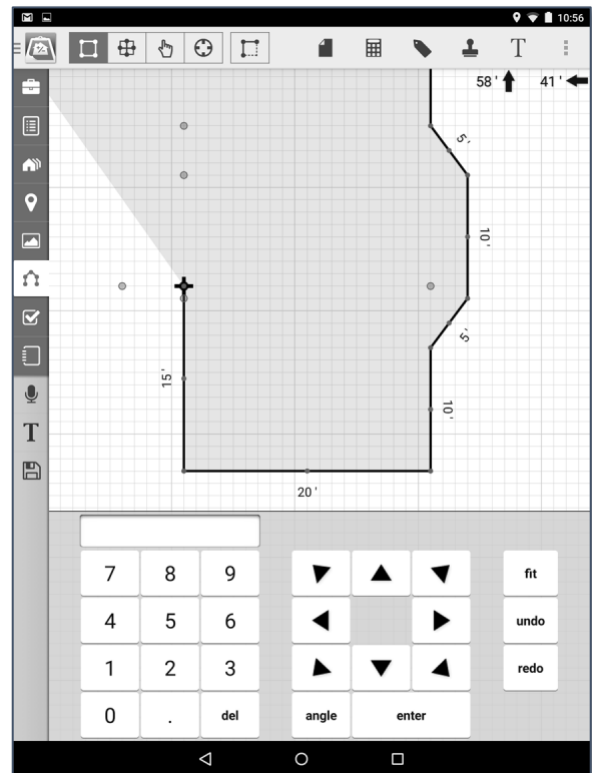
For the custom angle

Custom angles with long walls require that you measure the length and angle of the wall (using an angle measurement tool) while you're on site. Then, use this information to enter the line in your sketcher.

18. Enter 20, do NOT tap any direction

> 💡 *The angle button lights up.*

19. Tap angle to bring up the angle tool.
20. Enter 53 as the angle of deflection.
21. Tap the **left pointing arrow** (the orange side) on the angle tool to make the line deflect left and anchor the line in place automatically.
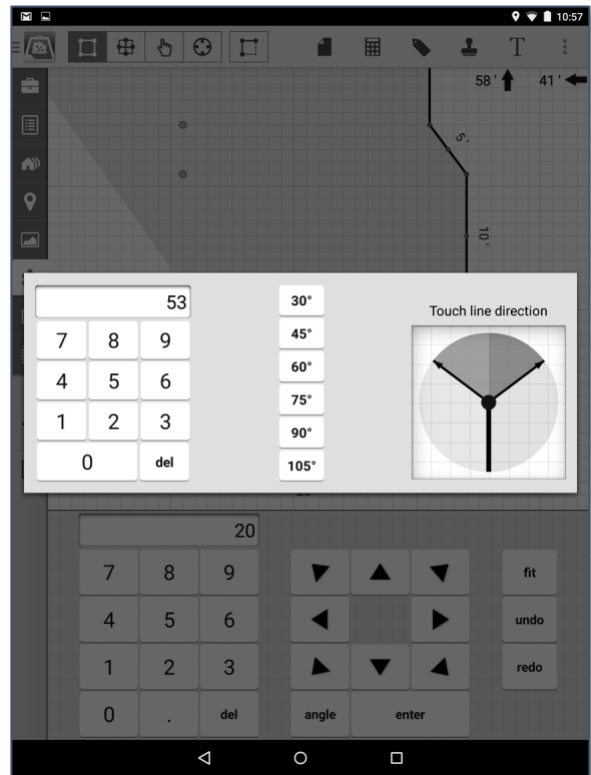
Continue drawing

Pop points (the red dots you see as you draw) allow you to extend or create lines in your drawing by simply tapping on them. They're useful for squaring sketches automatically in the field.

22. Enter 40, tap left, tap enter to lock in place.

23. After tapping fit, tap the pop-point above where your cursor is, in-line with the 16ft wall (your 3rd line drawn). The line pops into place.

24. Tap the pop-point immediately to the right of where your cursor is, in-line with your original starting point.

25. Tap your initial point of beginning to close the first area.

26. Verify that First Floor is indicated, then tap OK to complete your first area.

Exhibit #2
30 minutes
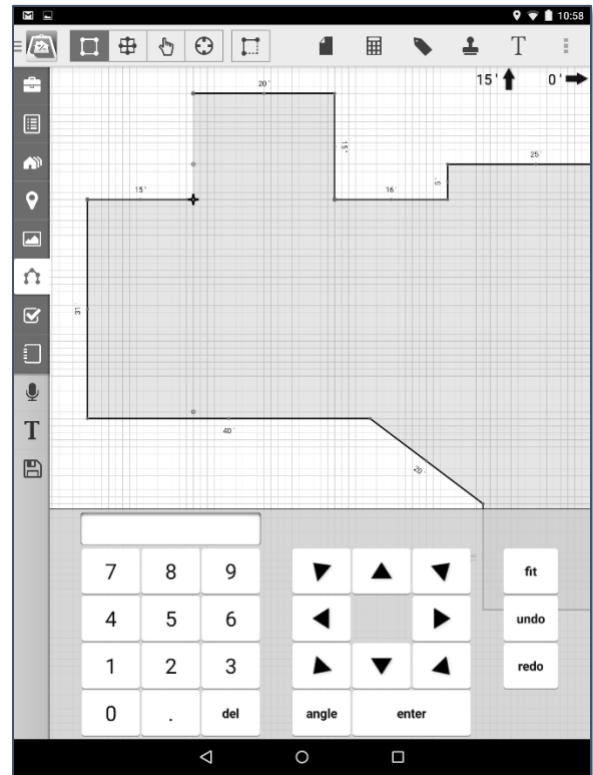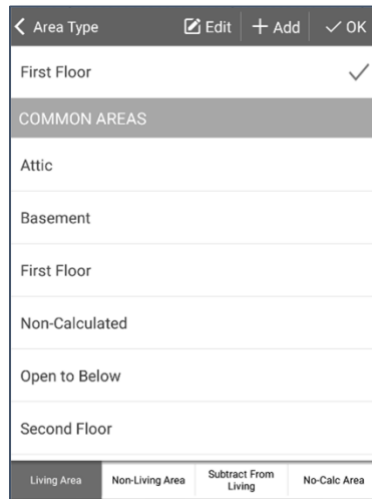
Cutting out the garage

Your initial sketch of the property footprint includes the garage. This affects your overall square footage and needs to be adjusted accordingly. Once you've been inside the property and know the interior measurements, you can use this information to "cut out" the garage area from the living space.

This is accomplished using area lines to draw the common (or shared) walls. Once you've done that, mobile app automatically creates two separate areas, each with their own properties ⊕ and calculations.

27. Verify you are in Place cursor mode.

28. Tap the corner in the upper-left of your drawing where two 15ft lines meet.

29. Tap enter to toggle drawing mode on. Verify you are drawing ⬜ Area walls.

30. Enter 5, tap down, tap enter to lock in place.

31. Use the pop point to the right of your cursor, then the pop point where it meets the outside wall to complete the garage cutout.

32. Verify that the appropriate garage type is selected. In this case, it should be 2 Car Attached, then tap OK to complete your garage. The Sq. Footage should be cut-out of your living area automatically.

You'll use the same method later to handle open-to-below areas such as stairwells, atriums, etc...
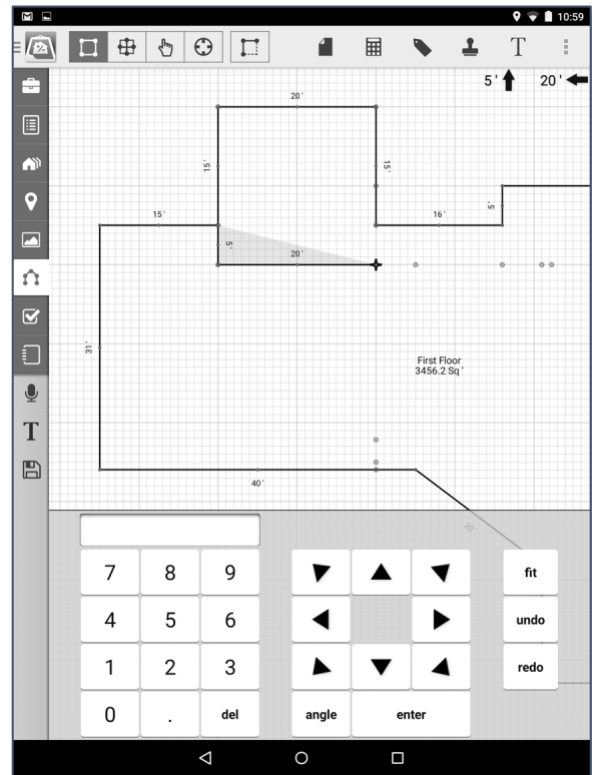
Adding on a wood deck or patio

33. Using two fingers, pan your drawing until the upper-right of your area is in view. Pinch to zoom as necessary to better view your sketch.

34. Verify you are in Place ⊕ cursor mode.

35. Tap the upper-right most corner of your area.

36. Tap enter to toggle drawing mode on. Verify you are drawing ▢ Area walls.

37. Enter 10, tap right, tap enter to lock in place.

Drawing your curve

Curves are one of the biggest challenges most appraisers face in the field. But with an understanding of the software and what information you need, they're easy.

You need three pieces of information in order enter a curve in mobile app :

- The chord length (in green on your screen).
- The arc height (in gray on your screen).
- The angle of the chord from your previous line.

With this in hand, you can draw your curve. Our example uses a simple 45 degree angled chord at 14.1 feet long:

38. Enter 14.1, tap the right-down arrow (which is a 45 degree angle automatically), then tap enter to lock.

> 💡 *If necessary, use what you previously learned about entering custom angles to enter the chord*

39. Tap the blue center point on your angled line.

40. Enter 2.9, then tap the up arrow, then tap enter to lock in place.

41. Tap the ▢ Area walls icon to continue drawing.

Exhibit #2
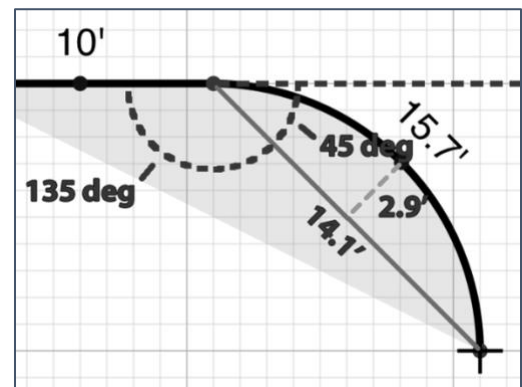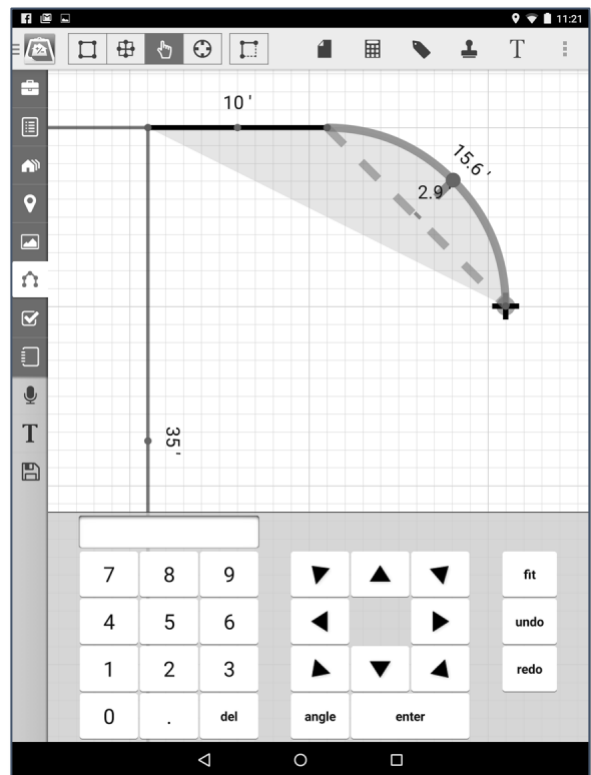
Continue Drawing

42. Enter 12, tap down, tap enter to lock in place.

43. Use the pop-point all the way against your original outside wall to quickly complete the deck.

44. Scroll and select the Wood Deck area type, then tap OK to complete your area.

M.93

Exhibit #2

Add your stairs

Symbols add detail and help show important features of a property. Mobile app includes several categories, including doors, staircases, bathroom fixtures, etc...

45. Pan your drawing using two fingers so you can see the area ⊥ just to the right of the garage.

46. Tap the Symbols icon.

47. Choose the Staircases category.

48. Select the L right stair symbol by tapping it.

49. Tap to place the stairs against the ↻ inside garage wall and outside wall.

50. Using the counter-clockwise rotation symbol, rotate your staircase 90 degrees counter-clockwise.

51. With your staircase highlighted, tap and drag anywhere on screen to generally place your stairs. Your finger does not have to be on the symbol to move it.
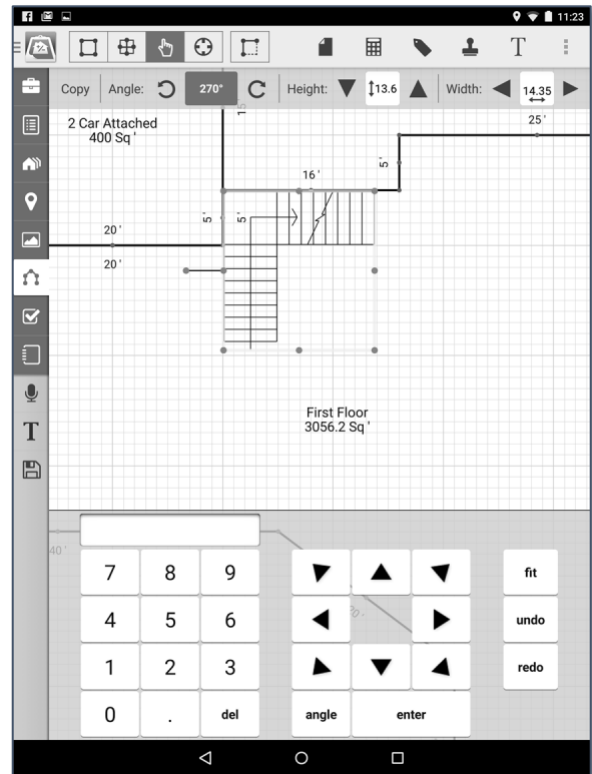
> 💡 *Once placed, with the symbol selected you may use your arrow buttons for finite placement of your*

If desired, adjust the size of your symbol using the green adjustment handles on the symbol while it is still selected.

52. Tap off of the icon to lock it in place.

In addition, you can create a list of favorite symbols that you use frequently simply by tapping on the star icon next to them in your list. Once a symbol has been marked as a favorite, you'll find it in the top category called Favorites.
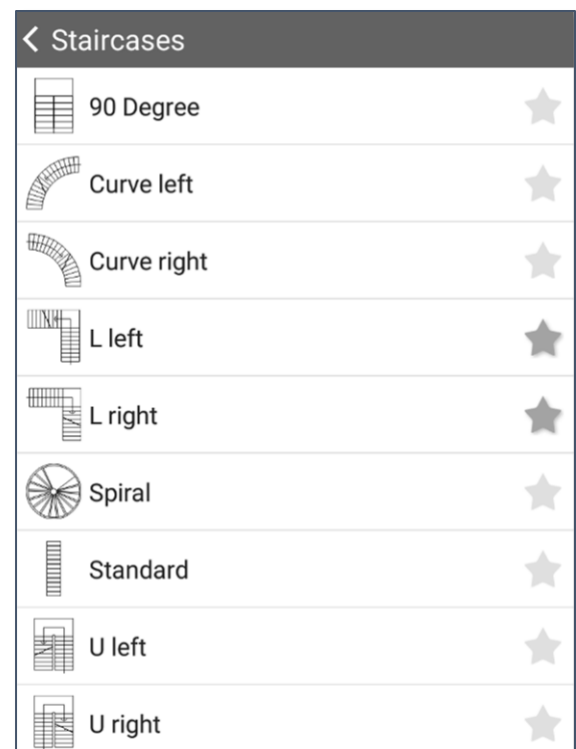
Cloning your first floor as second floor

In many cases, especially multi-story properties that have shared walls on multiple floors, re-using a previously drawn area saves you time and helps to increase accuracy in your sketch.

53. Tap the fit button to zoom out and see your entire sketch.

54. Tap once inside the first floor area to select it.

55. Tap Copy in the toolbar at the top of your sketch.

56. Tap the Outline option.
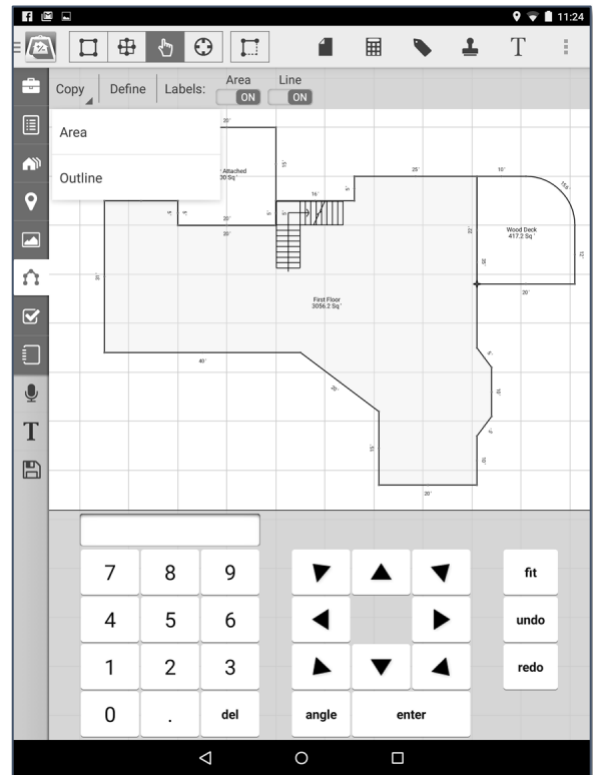
Creating a second page

Pages allow you to organize sketches that contain many areas, such as multiple floors or properties with additional buildings, so that the scale of the drawing and detail are set appropriately. Placing too many areas onto a single page results in final sketches that are difficult to see detail because each area is very small on the page.

57. Tap the ▮ Page icon, then tap Add to create a second page. You are taken immediately to that page.

58. Tap and hold on the blank drawing area until a pop-up menu displays.

59. Tap Paste Area.

> 💡 *The area is automatically pasted as Second Floor. You can adjust this by tapping Define if necessary.*
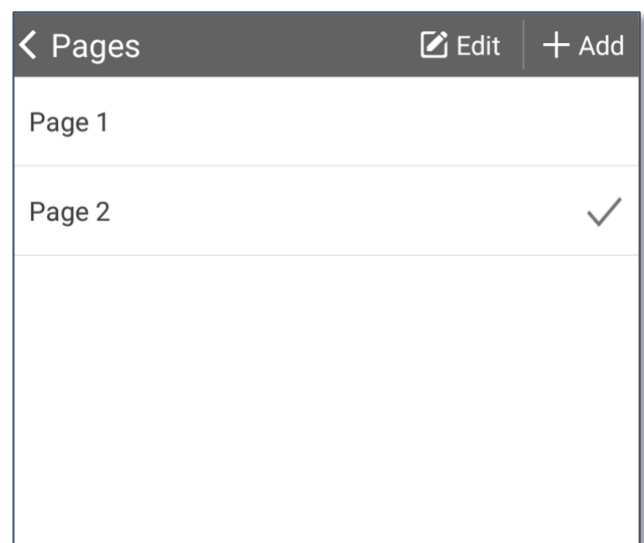
60. Deselect the area by tapping any empty space.

61. Tap fit.

Re-opening an existing area

Making changes to an existing area requires you to re-open that area. By re-opening the area, any other lines in the same area can adjust freely without changing their length or direction.

We need to remove part of the area we cloned from first to second floor:

62. Verify that you are in Modify mode, then Tap the 40ft line towards the bottom left of your area.

> 💡 *Make sure you tap the left end of the line, so the arrow is pointing*

63. Tap the delete button.
64. Tap the delete button 5 more times to remove the rest of the left half of the drawing, until you get to the 16ft line, which you should leave.
65. Tap off of the line to un-select it.

Re-closing the second floor

66. Tap the Place ⊕ Cursor icon.
67. Tap the end of your 20ft angled line.
68. Tap enter to toggle drawing mode on. Verify you are drawing ☐ Area walls.
69. Using the pop-point to the immediate left, extend your wall 5ft to the left.
70. Tap the pop-point in the upper left corner of your drawing to re-close the second floor.
71. Tap fit.

Exhibit #2

30 minutes
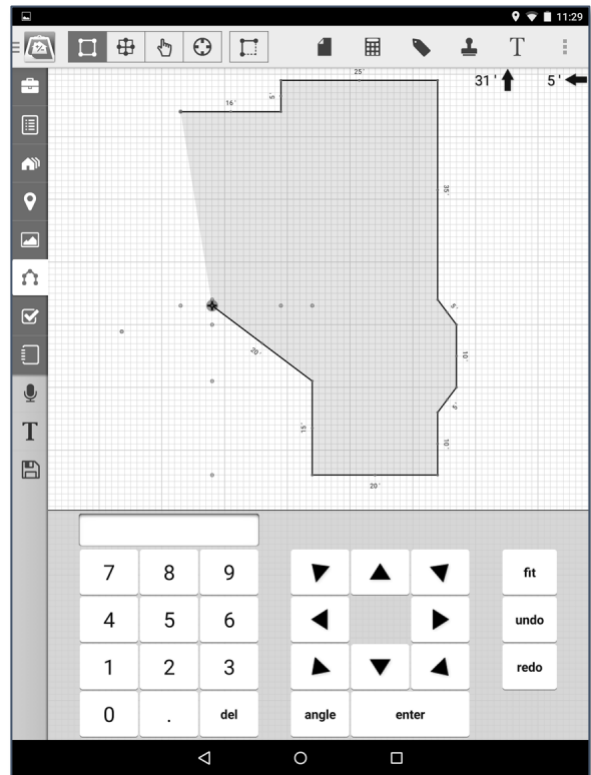
Open to below area

In many cases, you need to adjust living area down due to negative spaces in a property. Examples include lofts, atriums, or the edges around rooms that have heavily slanted roofs.

72. Verify you are in Place ⊕ Cursor mode.
73. Tap the point where 16ft meets 5ft towards the upper-left of your area.
74. Tap enter to toggle drawing mode on. Verify you are drawing ⬚ Area walls.
75. Enter 15, tap down, tap enter to lock the line in place.
76. Tap the pop point on the left wall.
77. Select Open to Below as your area type.
78. Tap **OK**.
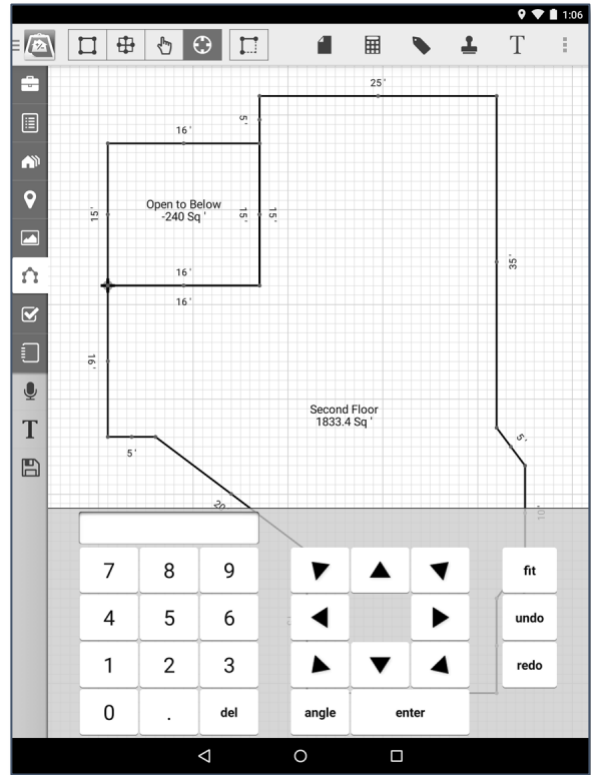
You can see on the Area Type screen how you can control whether an area's calculations are added to or subtracted from the total living space.

- Living Area – Calculations are positive, and added to the overall GLA.
- Non-Living Area – Calculations are positive, but not added to the overall GLA. If you are cutting an area out of a larger area (such as a garage from a first floor), the parent area's square footage is adjusted automatically.
- Subtract From Living – Calculations are negative, and are subtracted from the overall GLA and any applicable parent area.
- No-Calc Area – The area is not calculated.

Exhibit #2
30 minutes
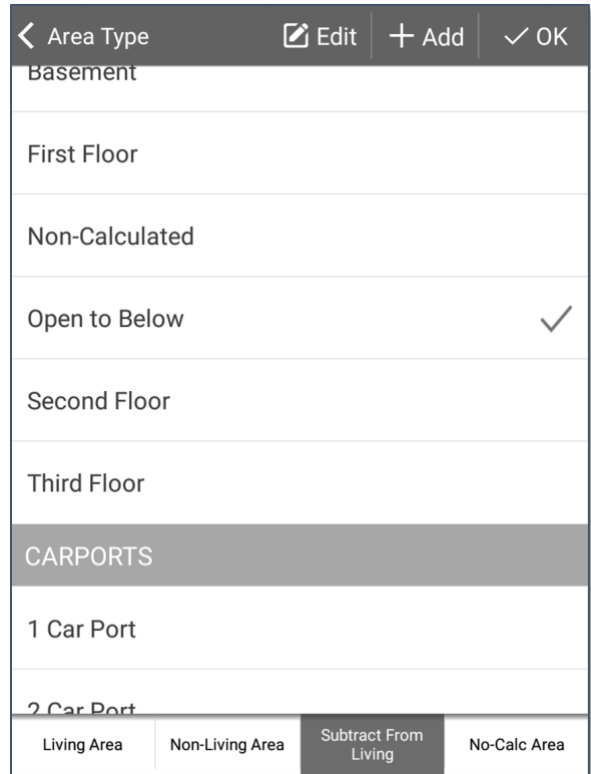
Moving labels or other items

79. Tap Modify, then tap to select the **Open to Below** area label. A highlighted box appears around it.

80. Using a single finger in any open space, **tap and drag** to position your label or other selected item.
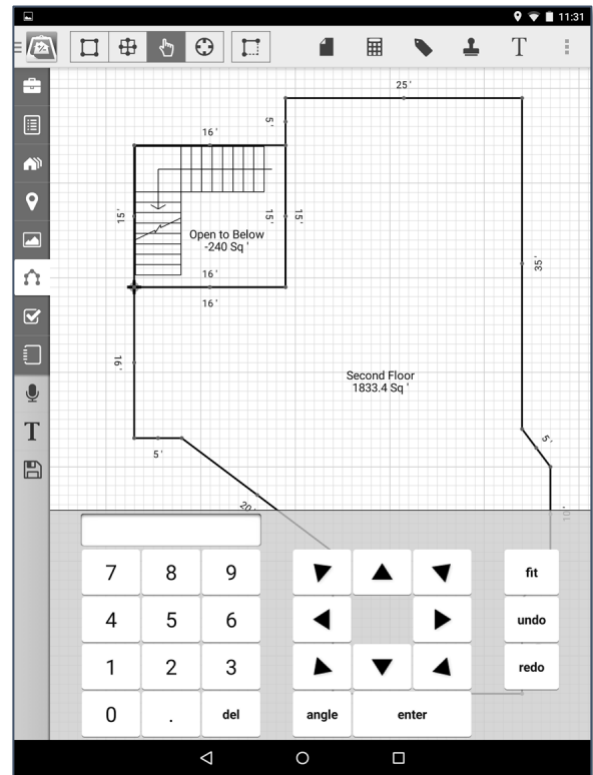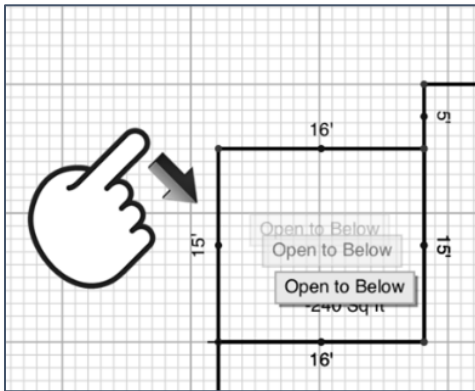
81. Deselect your selected item by tapping any open space in your sketch.

Adding stairs to your second floor

82. Tap the Symbols ⚒ icon, then scroll to and tap on the Staircases category.

83. Tap the L Left staircase.

84. Tap to place your symbol.

85. With the symbol selected, use the counter-clockwise rotation button ↺ to rotate your staircase 90 degrees counter-clockwise.

86. With your staircase highlighted, tap and drag anywhere on screen to generally place your stairs. Your finger does not have to be on the symbol to move it.

> 💡 *Once placed, and with the symbol selected, use your arrow buttons for finite placement of your stairs.*

   If desired, adjust the size of your symbol using the green adjustment handles on the symbol while it is still selected.

87. Tap any open space in to finalize placement of your staircase.

88. Tap fit to see your second floor in its entirety.

Drawing Interior Walls

When drawing interior walls, you'll be moving your cursor around frequently to reposition it, so pay special attention to the state of your cursor. Pulsing green means drawing free-form walls, static means "pen up", or not actively drawing.

You'll also notice visible pop points when you are in an active drawing mode.
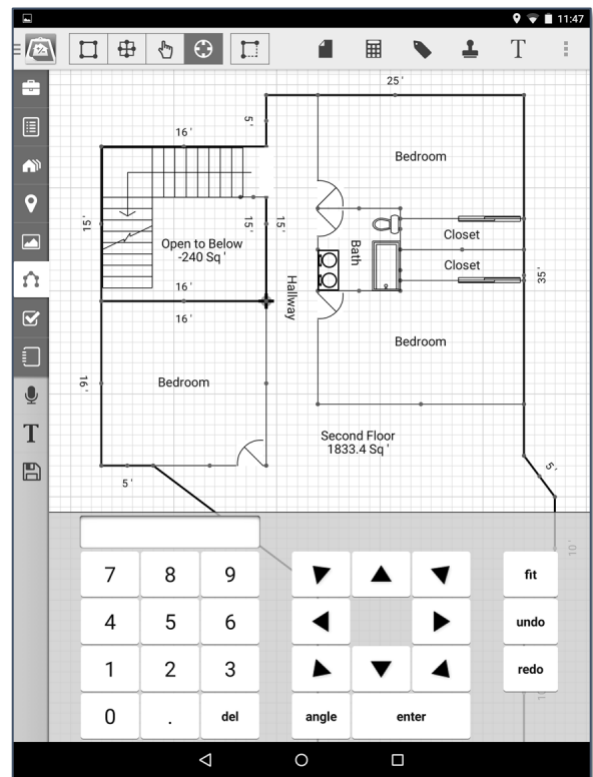
- Tap the enter button to toggle back and forth between the two.
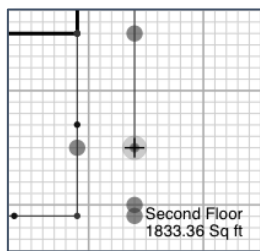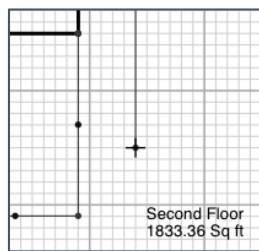
Drawing   NOT drawing

- When your cursor is inactive, or "pen up", you can precisely reposition your cursor without drawing by using the numbers and arrows on your keypad.
- Remember, tapping Undo reverts your most recent line if your results aren't what you expect.
- Add walls first, then symbols after.

89. Tap Freeform walls ⊕ and, using enter to toggle drawing mode on and off and Place ⊕ Cursor to determine your starting point or reposition your cursor, complete some or all of the following action items in your second floor:
   - Add bedrooms
       i. The two bedrooms on the right are 20'x15' each.
       ii. The bedroom on the left is 16'x16'.
   - Add a bathroom
       i. The bathroom is 8'x8'.
   - Create closets.
       i. Closets are 3' deep.
   - Using symbols, add bathroom fixtures.

- Using the eraser symbol (found in the Other category), create an opening for the stairwell.
- Using symbols, add bedroom and closet doors.

Adding Room Labels

Placing labels on your sketch helps your reader to know where each room is relative to the others in your subject property.

90. Tap the ![tag icon] Labels icon, and then choose a label from the list. Let's begin with Bedrooms by tapping to select it.

91. Zoom in to your second floor a bit by pinching out on your drawing… pan using two fingers as necessary to find one of the bedrooms you drew in the previous step.

92. Tap to place the Bedroom label inside the room.

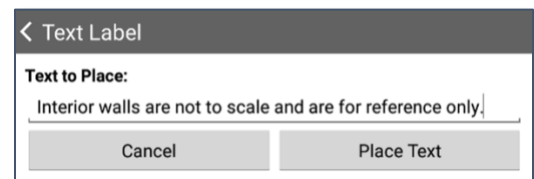93. Repeat steps 92 – 94 to place additional labels on the drawing. (See example for placement)

> *You can "stamp" labels by tapping Copy on a selected label, then tapping and holding where you wish to place a copy, then tapping paste. You can paste repeatedly without having to re-copy*

Add freeform text to your sketch

Create a custom label if you need to add notes to your sketch.

94. Tap the Freeform Text ![T icon] tool on your toolbar.

95. Enter your desired freeform text in the appropriate field.

96. Tap Place Text, then tap your sketch to place your label.

‹ Text Label

Text to Place:

Interior walls are not to scale and are for reference only.

Cancel   Place Text

M.101

To collect room details from your sketch

Room labels also allow you to gather important room-specific data you use later to complete your report.

97. After room labels have been placed, double-tap a room to open the room data gathering screen.

98. Complete the details by filling in each field.

99. Tap the camera to take a photo of this room.

100. Tap the back button in the upper-left corner to return to your sketch.

> *You can take multiple photos and they're added to interior photo pages automatically in the order they were taken.*

Exiting the sketch view

101. Tap any of the other PowerViews to continue gathering data for your report in mobile app and close your sketch.

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Exhibit #2

Supplemental materials

Exhibit #2

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Exhibit #2

Florida Contract for Sale

THIS FORM HAS BEEN APPROVED BY THE FLORIDA ASSOCIATION OF REALTORS® AND THE FLORIDA BAR

Contract For Sale And Purchase
FLORIDA ASSOCIATION OF REALTORS® AND THE FLORIDA BAR

1* **PARTIES:** Bob & Emma Thompson _____ ("Seller"),
2* and Jack & Jill Smith _____ ("Buyer"),
3 hereby agree that Seller shall sell and Buyer shall buy the following described Real Property and Personal Property (collectively "Property")
4 pursuant to the terms and conditions of this Contract for Sale and Purchase and any riders and addenda ("Contract"):
5 **I. DESCRIPTION:**
6* (a) Legal description of the Real Property located in Orange _____ County, Florida: Lots 13, 14, &
7* 15, VALENCIA TERRACE, according to the plat thereof as recorded in plat book K.
8* (b) Street address, city, zip, of the Property: 1177 North Park Avenue, Winter Park, FL 32789
9 (c) Personal Property includes existing range(s), refrigerator(s), dishwasher(s), ceiling fan(s), light fixture(s), and window treatment(s) unless
10 specifically excluded below.
11* Other items included are: _____
12* _____
13* Items of Personal Property (and leased items, if any) excluded are: _____
14* _____

15* **II. PURCHASE PRICE** (U.S. currency): . . . . $ 1,200,000.00
16 **PAYMENT:**
17* (a) Deposit held in escrow by James Brown _____ ("Escrow Agent") in the amount of (checks subject to clearance) $ 250,000.00
18* Escrow Agent's address: 101 Main Street, Orlando, FL 32806 Phone: (407) 555-1597
19* (b) Additional escrow deposit to be made to Escrow Agent within 10 days after Effective Date in the amount of. . . . . $ 250,000.00
20* (c) Financing in the amount of ("Loan Amount") see Paragraph IV below . . . . $ 0.00
21* (d) Other . . . . $ 0.00
22 (e) Balance to close by cash, wire transfer or LOCALLY DRAWN cashier's or official bank check(s), subject
23* to adjustments or prorations . . . . $ 700,000.00

24 **III. TIME FOR ACCEPTANCE OF OFFER AND COUNTEROFFERS; EFFECTIVE DATE:**
25 (a) If this offer is not executed by and delivered to all parties OR FACT OF EXECUTION communicated in writing between the parties on or
26* before 11/17/2013 , the deposit(s) will, at Buyer's option, be returned and this offer withdrawn. **Unless other-**
27 **wise stated, the time for acceptance of any counteroffers shall be 2 days from the date the counteroffer is delivered.**
28 (b) The date of Contract ("Effective Date") will be the date when the last one of the Buyer and Seller has signed or initialed this offer or the
29 final counteroffer. If such date is not otherwise set forth in this Contract, then the "Effective Date" shall be the date determined above for
30 acceptance of this offer or, if applicable, the final counteroffer.

31 **IV. FINANCING:**
32* ☑ (a) This is a cash transaction with no contingencies for financing;
33* ☐ (b) This Contract is contingent on Buyer obtaining written loan commitment which confirms underwriting loan approval for a loan to purchase
34* the Property ("Loan Approval") within _____ days (if blank, then 30 days) after Effective Date ("Loan Approval Date") for (CHECK ONLY
35* ONE): ☐ a fixed; ☐ an adjustable; or ☐ a fixed or adjustable rate loan, in the Loan Amount (See Paragraph II.(c)) at an initial interest rate not to
36* exceed _____%, and for a term of _____ years. Buyer will make application within _____ days (if blank, then 5 days) after Effective Date.
37 **BUYER:** Buyer shall use reasonable diligence to: obtain Loan Approval; **notify Seller in writing of receipt of Loan Approval by Loan Approval**
38 **Date**; satisfy terms of the Loan Approval; and close the loan. Loan Approval which requires a condition related to the sale of other property shall
39 not be deemed Loan Approval for purposes of this subparagraph. Buyer shall pay all loan expenses. Buyer authorizes the mortgage broker(s) and
40 lender(s) to disclose information regarding the conditions, status, and progress of loan application and Loan Approval to Seller, Seller's attorney,
41 real estate licensee(s), and Closing Agent.
42 **SELLER:** If Buyer does not deliver to Seller written notice of Loan Approval by Loan Approval Date, Seller may thereafter cancel this Contract by
43 delivering written notice ("Seller's Cancellation Notice") to Buyer, but not later than seven (7) days prior to Closing. Seller's Cancellation Notice shall
44 notify Buyer that Buyer has three (3) days to deliver to Seller written notice waiving this Financing contingency, or the Contract shall be cancelled.
45 **DEPOSIT(S) (for purposes of this Financing Paragraph IV(b) only):** If Buyer has used reasonable diligence but does not obtain Loan Approval
46 by Loan Approval Date, and thereafter either party elects to cancel this Contract, the deposit(s) shall be returned to Buyer. If Buyer obtains Loan
47 Approval or waives this Financing contingency, and thereafter the Contract does not close, then the deposit(s) shall be paid to Seller; provided how-
48 ever, if the failure to close is due to: (i) Seller's failure or refusal to close or Seller otherwise fails to meet the terms of the Contract, or (ii) Buyer's lender
49 fails to receive and approve an appraisal of the Property in an amount sufficient to meet the terms of the Loan Approval, then the deposit(s) shall be
50 returned to Buyer.
51* ☐ (c) Assumption of existing mortgage (see rider for terms); or
52* ☐ (d) Purchase money note and mortgage to Seller (see Standards B and K and riders; addenda; or special clauses for terms).
53* **V. TITLE EVIDENCE:** At least 10 days (if blank, then 5 days) before Closing a title insurance commitment with legible copies of instruments listed as
54 exceptions attached thereto ("Title Commitment") and, after Closing, an owner's policy of title insurance (see Standard A for terms) shall be obtained by:
55* **(CHECK ONLY ONE):** ☐ (1) Seller, at Seller's expense and delivered to Buyer or Buyer's attorney; or
56* ☐ (2) Buyer at Buyer's expense.
57* **(CHECK HERE):** ☐ If an abstract of title is to be furnished instead of title insurance, and attach rider for terms.
58* **VI. CLOSING DATE:** This transaction shall be closed and the closing documents delivered on 11/30/2013 ("Closing"), unless
59 modified by other provisions of this Contract. In the event of extreme weather or other conditions or events constituting "force majeure", Closing will be
60 extended a reasonable time until: (i) restoration of utilities and other services essential to Closing, and (ii) availability of Hazard, Wind, Flood, or Homeowners'
61* insurance. If such conditions continue more than _____ days (if blank, then 14 days) beyond Closing Date, then either party may cancel this Contract.

FAR/BAR-8   Rev. 9/07   © 2007   Florida Association of REALTORS® and The Florida Bar   All Rights Reserved   **Page 1 of 4**

Exhibit #2

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Exhibit #2

Florida Warranty Deed

Exhibit #2

Prepared by and return to:

James Brown, Esq.
Attorney at Law
Johnson & Johnson Law Firm
101 Main Street, SUITE 2
Orlando, FL 32806
407-555-1597
File Number: **FL12300987**
Will Call No.:

Parcel Identification No. **52-45-87-8465-1543**

DOC# 545687913245 B: 10537 P: 0221
12/10/2013 11:46:46 AM Page 1 of 2
Rec Fee: $18.50
Deed Doc Tax: $9,940.00
DOR Admin Fee: $0.00
Intangible Tax: $0.00
Mortgage Stamp: $0.00
Sally Ficticious, Comptroller
Orange County, FL
MB - Ret To: JOHNSON & JOHNSON LAW FIRM

-- [Space Above This Line For Recording Data] --

Warranty Deed
(STATUTORY FORM – SECTION 689.02, F.S.)

This Indenture made this **1st** day of **December, 2013** between **Bob Thompson and Emma Thompson, husband and wife** whose post office address is **1177 North Park Avenue, Winter Park, FL 32789** of the County of **Orange**, State of **Florida**, grantor*, and **Jack Smith and Jill Smith, husband and wife** whose post office address is **1177 North Park Avenue, Winter Park, FL 32789** of the County of **Orange**, State of **Florida**, grantee*,

Witnesseth that said grantor, for and in consideration of the sum of TEN AND NO/100 DOLLARS ($10.00) and other good and valuable considerations to said grantor in hand paid by said grantee, the receipt whereof is hereby acknowledged, has granted, bargained, and sold to the said grantee, and grantee's heirs and assigns forever, the following described land, situate, lying and being in **Orange County, Florida**, to-wit:

> **Lots 13, 14, and 15, VALENCIA TERRACE, according to the plat thereof as recorded in Plat Book K, Page 124, Public Records of Orange County, Florida.**
>
> **LESS begin at the Southwest corner of Lot 14, thence run along line of said Lot 14 in a Northwesterly direction 50 feet to the Northwest corner of said Lot 14, thence run Northerly along the West line of Lot 13 a distance of 44 feet to the Northwest corner of said Lot 13; thence Easterly along North line 49 feet; thence Southerly in a straight line to POINT OF BEGINNING.**
>
> **ALSO LESS Begin at Northeasterly corner of Lot 13, run Southwesterly along the Southwesterly line of Lot 12, 75 feet; thence Southeasterly 12.15 feet; thence Northeasterly 73.9 feet to the POINT OF BEGINNING.**

and said grantor does hereby fully warrant the title to said land, and will defend the same against lawful claims of all persons whomsoever.

* "Grantor" and "Grantee" are used for singular or plural, as context requires.

In Witness Whereof, grantor has hereunto set grantor's hand and seal the day and year first above written.

Exhibit #2

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Exhibit #2

Plat Map

Exhibit #2

Exhibit #2

Exhibit #2

INTERNAL PROCEDURE 201704
Proposed Amendment June 20, 2024

AMC Fund Cash Balance

In accordance with Neb. Rev. Stat. § 76-3219, the appraisal management company fund shall be used to implement, administer, and enforce the AMC Registration Act. The agency must be properly funded to administer and enforce the act, meet the requirements as specified in Title XI of Financial Institutions Reform, Recovery, and Enforcement Act of 1989, and ensure that proper financial protection is in place to manage any issue that may arise. For the fiscal year 2024~~1~~-25~~2~~, the minimum fund balance for the AMC fund shall be $224,348.50~~211,210.05~~. This balance includes the following:

1. An amount equal to half of the operating budget for the next fiscal year. If funds have not been appropriated for the next fiscal year, the current fiscal year may be substituted until appropriations are awarded for the next fiscal year. (FY 2024~~1~~-25~~2~~: $148,697.00~~122,420.10~~/2 = $74,348.50~~61,210.05~~). Justification for this amount includes:

   a. The Board must be prepared to manage a sharp decline in revenues due to a loss in the number of appraisal management companies and applications for registration as appraisal management companies. There has been constant pressure at the federal level to make changes to appraiser and appraisal management company regulations; Implementation of the AMC Final Rule and deregulation may result in a drastic decrease in the number of appraisal management companies registered in this state.

   b. The Board must be prepared to manage all related to the costs associated with investigations. This includes both investigation costs and training costs.

c. The Board must be prepared to purchase equipment and supplies as needed to administer and enforce the Act. Technology and methodology improvements may require upgraded equipment and/or supplies.

d. The Board must be prepared for unexpected cost increases associated with employee benefits. Healthcare reform leaves many unanswered questions in the foreseeable future.

2. An amount specified for potential litigation. Legal expenses for the most recent matter under the Real Property Appraiser Act exceeded $50,000.00. The Board must be prepared to manage any costs of litigation that may arise. Legal expenses could potentially exceed $100,000.00, and as such, the AMC fund balance shall include this amount for potential legal expenses.

3. An amount specified for technology projects. Statute and rule changes, along with operation changes, require that the Board's database and website are upgraded regularly. Many projects, including complete overhauls are very expensive. The most recently completed database project cost more than $220,000.00. The Board must be prepared to address costs associated with technology upgrades needed to administer and enforce the Act in an effective and efficient manner. The AMC fund balance shall include $50,000.00 for technology projects.

INTERNAL PROCEDURE 201705

Proposed Amendment June 20, 2024

Real Property Appraiser Fund Cash Balance

In accordance with Neb. Rev. Stat. § 76-2226, the real property appraiser fund shall include a sufficient cash fund balance as determined by the Board. The agency must be properly funded to administer and enforce the Real Property Appraiser Act, meet the requirements as specified in Title XI of Financial Institutions Reform, Recovery, and Enforcement Act of 1989, and ensure that proper financial protection is in place to manage any issue that may arise. For the fiscal year 2024~~1~~-25~~2~~, the minimum fund balance for the real property appraiser fund shall be $358,861.50~~341,532.95~~. This balance includes the following:

1. An amount equal to half of the operating budget for the next fiscal year. If funds have not been appropriated for the next fiscal year, the current fiscal year may be substituted until appropriations are awarded for the next fiscal year. (FY 2021-22: $317,723.00~~283,065.90~~/2 = $158,861.50~~141,532.95~~). Justification for this amount includes:

    a. The Board must be prepared to manage a sharp decline in revenues due to a loss in the number of appraisers. According to the Appraisal Institute, the average age of an appraiser is 55 years old. Many appraisers will be retiring during the next ten years, and the number of new appraisers entering the profession does not meet market demand.

    b. The Board must be prepared to manage all related to the costs associated with investigations. This includes both investigation costs and training costs.

    c. The Board must be prepared to purchase equipment and supplies as needed to administer and enforce the Act. Technology and methodology improvements may require upgraded equipment and/or supplies.

d. The Board must be prepared for unexpected cost increases associated with employee benefits. Healthcare reform leaves many unanswered questions in the foreseeable future.

e. Due to the Board's revenue structure, the majority of revenues are received during a two to four month period (November to February). The Board must have adequate funds to administer and enforce the Act during low revenue months.

2. An amount specified for potential litigation. Legal expenses for the most recent matter exceeded $50,000.00. The Board must be prepared to manage any costs of litigation that may arise. Legal expenses could potentially exceed $100,000.00, and as such, the real property appraiser fund balance shall include this amount for potential legal expenses.

3. An amount specified for technology projects. Statute and rule changes, along with operation changes, require that the Board's database and website are upgraded regularly. Many projects, including complete overhauls are very expensive. The most recently completed database project cost more than $220,000.00. The Board must be prepared to address costs associated with technology upgrades needed to administer and enforce the Act in an effective and efficient manner. The real property fund balance shall include $100,000.00 for technology projects.

NRPAB
Nebraska Real Property Appraiser Board

Criminal History Record Check Procedures
Effective ~~August 20~~June 20, 202~~04~~

General Information

1. The file cabinet with the Criminal History Record Check drawer will be kept locked when not actively in use. Keys will be in the possession of the Director and the ~~Business and~~ Licensing Programs Manager~~Specialist~~.

2. Criminal History Record Information received from the Nebraska State Patrol will not be scanned. No PDF copy will be kept on the W: drive or in the database.

3. Information obtained only from Criminal History Record Information will not be quoted in database log entries or in letters to any party other than the subject who provided the fingerprints.

4. Fingerprint cards submitted to the Board's office by an individual that is not subject to a Criminal History Record Check under the Board's authority shall be returned to the individual immediately with a written explanation as to why the fingerprint cards are being returned.

5. Criminal History Record Information received at the Board's office from the Nebraska State Patrol for an individual that is not subject to a Criminal History Record Check under the Board's authority shall be returned to the Nebraska State Patrol immediately after the determination is made that this individual is not subject to a Criminal History Record Check under the Board's authority with a written explanation as to why the Criminal History Record Information is being returned.

6. All agency employees, including temporary employees, will receive training regarding the handling of Criminal History Record Information.
   a. A training log will be maintained including employee name and date of initial and subsequent training.
   b. New employees will be trained within 6 months of hiring.
   c. Refresher training will take place at least biennially after initial training.

7. Security incidents will be reported promptly to the Nebraska State Patrol Criminal Identification Division.

8. Authorization to use fingerprints for National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation and Privacy Act Statement with space for acknowledgement signature will be available as part of the application process and separately on the Board website. Individuals subject to a Criminal History Record Check will be required to acknowledge such authorization during the initial phases of the application process. Fingerprint cards will only be accepted if an acknowledgement of authorization has been submitted to the Board's office in advance of receipt of the fingerprint cards, or with receipt of the fingerprint cards.

    a. **Real Property Appraiser Initial or upgrade application** – National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation and Privacy Act Statement form will be incorporated into the application. Applicant will be directed to complete the form prior to having fingerprints taken, and to submit the form prior to or simultaneously with the application.

    b. **Real Property Appraiser renewal application** – Potential applicants will be notified in advance of random selection for submission of fingerprints for a Criminal History Record Check. Applicant will be directed to print, complete, and submit the National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation and Privacy Act Statement form prior to having the fingerprints taken.

    b. **Appraisal Management Company registration or renewal of registration application** - National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation and Privacy Act Statement form will be part of the application process for any owner of more than 10% of appraisal management company applying for registration or for any owner of more than 10% of appraisal management company applying for renewal of registration if the owner has not previously had a Criminal History Record Check Completed by the Board through the Nebraska State Patrol and the Federal Bureau of Investigation for the purpose of AMC ownershiprenewal of a registration. Applicant will be directed to print a separate form for each owner of more than 10% and to have the owner complete the form before having the fingerprints taken. Completed forms may be submitted prior to or simultaneously with the application.

    c. **Appraisal Management Company (not registration or renewal of registration application)** - National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation and Privacy Act Statement form will be required for any owner of more than 10% of appraisal management company identified by the Board if the owner has not previously had a Criminal History Record Check Completed by the Board through the Nebraska State Patrol and the Federal Bureau of Investigation for the purpose of AMC ownership of a registered AMC. Applicant will be directed to print a form for an owner of more than 10% and to have the owner complete the form before having the fingerprints taken.

    c.

9. If fingerprint cards are requested by an individual subject to a Criminal History Record Check, at least 2 cards with preprinted ORI number shall be mailed to address requested.

10. If fingerprint cards are received but no application has been received, file in "Received Fingerprints, No Application" folder in locked Criminal History Record Check drawer. Once an application is received, Step 1 of the Procedure for Review and Storage may be implemented.

11. Violations of the criminal history record check procedures by NRPAB employees will be addressed in accordance with the NRPAB employee handbook.

Procedure for Review and Storage

1. If fingerprint cards are submitted with an application for a new real property appraiser credential, renewal of a real property appraiser credential, new AMC registration (each owner of more than 10%), or renewal of an AMC registration (each new owner of more than 10% who has not previously had a Criminal History Record Check Completed by the Board through the Nebraska State Patrol and the Federal Bureau of Investigation for the purpose of AMC ownership), or new owner of 10% or more of a registered AMC identified by the Board (who has not previously had a Criminal History Record Check Completed by the Board through the Nebraska State Patrol and the Federal Bureau of Investigation for the purpose of AMC ownership), the application shall be reviewed for the following:
   a. Signed authorization for the Board to use fingerprints for National Criminal History Record Check through Nebraska State Patrol and Federal Bureau of Investigation,
   b. Signed receipt of Privacy Act statement,
   c. The date of record is completed on the fingerprint cards,
   d. The reason for submission is completed and falls under the Board's authority to have a Criminal History Record Check conducted,
   e. Signature of the individual subject to the Criminal History Record Check is included on the fingerprint cards, and
   f. The following identification information is completed on the fingerprint cards:
      i. name,
      ii. social security number, (desirable, but optional)
      iii. sex,
      iv. race,
      v. hgt,

      vi.   wgt,

      vii. eyes,

      viii. hair,

      ix. date of birth, and

      x.   place of birth

2. If any of the requirements of Step 1 are not met, the application, along with the fingerprint submissions, shall be returned to the applicant as invalid.

3. If one or both of the fingerprint cards submitted to the Board's office includes a date of record more than one year old at the time the fingerprint cards are received at the Board's office, the application, along with the fingerprint submissions, shall be returned to the applicant as invalid with a written explanation. The Nebraska State Patrol will not process fingerprint cards with a date beyond one year old.

~~4.~~ If fingerprint cards are complete, log in Appraiser Fingerprint Submissions tracker (W:\Credentials\Background Checks) or AMC Fingerprint Submissions Log tracker (W:\Appraisal Management Companies\Background Checks).

4.

5. Complete and print out State Patrol Request (W:\Credentials\Form Letters) or AMC State Patrol Request (W:\Appraisal Management Companies\Background Checks). Choose the appropriate reason fingerprinted from the dropdown menu.

6. Place sticker with appropriate Statutory Authority for the type of application in Reason Fingerprinted space on cards:
   a. for individuals who hold more than 10% ownership in an AMC (initial ~~or renewal~~application, renewal application, or identified by the Board) "AOWN – 76-3207",
   b. Trainee Appraisers "ATRN – 76-2228.01",
   c. Licensed Residential Real Property Appraisers "ALIC – 76-2230",
   d. Certified Residential Real Property Appraisers "ACRT – 76-2231.01",
   e. Certified General Real Property Appraisers "AGEN – 76-2232",
   f. Credentialed applicants from another jurisdiction seeking Nebraska certification (reciprocity applicants) "AREC – 76-2233", and
   g. ~~Renewal credentials (appraiser renewal applications only) "AREN – 76-2233.02".~~

7. If ORI number is absent or incorrect, place sticker with "NB920183Z" in ORI space on card.

8. Paperclip fingerprint card(s) to State Patrol Request and send via interagency mail to ~~BACKGROUNDS, NSP CID, 3800 NW 12th~~CID BACKGROUNDS, NEBRASKA STATE PATROL, 4600 INNOVATION DR.

9. Log sending fingerprint cards to NSP in database appraiser's log history or AMC's Application Communication and Documentation Log, attaching a copy of the State Patrol Request Form.

10. If Nebraska State Patrol sends a fingerprint rejection notice
    a. Record rejection date in Appraiser Fingerprint Submissions or AMC Fingerprint Submissions Log tracker.
    b. Scan rejection letter.
    c. Log and upload rejection letter in database appraiser's log history or AMC's Application Communication and Documentation Log.
    d. Mail original rejection letter and any returned card(s) to applicant with letter requesting new fingerprint cards within 60 days.
    e. When new fingerprint cards are received
        i. Log date in Appraiser Fingerprint Submissions or AMC Fingerprint Submissions Log tracker.
        ii. Log in database appraiser's log history or AMC's Application Communication and Documentation Log.
        iii. Print out a copy of the rejection notice from the database log.
        iv. Paperclip new fingerprint cards to rejection notice.
        v. Send via interagency mail to 12thCID BACKGROUNDS, NEBRASKA STATE PATROL, 4600 INNOVATION DR~~BACKGROUNDS, NSP CID, 3800 NW 12th~~.

11. If second set of fingerprint cards are rejected, request a name only check.

12. When Criminal History Record Information is received from Nebraska State Patrol
    a. Log date in Appraiser Fingerprint Submissions or AMC Fingerprint Submissions Log tracker.

13. If Criminal History Record Information indicates no criminal record found
    a. Log "~~Background screening passed~~Background results received. OK to proceed." in database appraiser's log history or AMC's Application Communication and Documentation Log.
    b. Place Criminal History Record Information in alphabetical order in appropriate folder in locked Background Check drawer.

14. If Criminal History Record Information shows record found, and disposition is in question or further specifics of the offense are needed, Licensing Programs Manager will contact the jurisdiction and request the information. Do not indicate in writing or in conversation that the source of the information was an FBI Criminal History Record check. "As part of our background check process, please provide public records information" on disposition, arrest, etc. Information from the jurisdiction may be scanned and logged in the database. submit the Criminal History Record Information and any publicly available information ~~submit~~ to Director for review.

a. If Director decides no further investigation is required,
    i. Director will log "Background screening reviewed and passed" or wording to that effect in database appraiser's log history or AMC's Application Communication and Documentation Log.
    ii. Place Criminal History Record Information in alphabetical order in appropriate folder in locked Background Check drawer.
b. If Director decides further investigation is required, due to the serious nature of the offenses on the Criminal History Record Information, absence of disposition information, or because the applicant did not report the offenses on the application, the following actions may be taken:
    i. ~~If disposition is in question or further specifics of the offense are needed, contact the jurisdiction and request the information. Do not indicate in writing or in conversation that the source of the information was an FBI Criminal History Record check. "As part of our background check process, please provide public records information" on disposition, arrest, etc. Information from the jurisdiction may be scanned and logged in the database.~~
    ~~ii.~~ i. If explanation from the individual subject to the Criminal History Record Check is required, mail a letter via US Postal Service addressed to the person subject to the Criminal History Record Check. A photocopy of the rap sheet shall be included with the letter. In the text of the letter, refer only to "the enclosure" or to information obtained from sources other than the FBI. No reference to information obtained only from the FBI should appear in a word document or PDF in the W: drive or the database.

      iii.ii.   If the Criminal History Record Information is required by the Board to make a decision concerning issuance of a real property appraiser credential, renewal of a real property appraiser credential, issuance of an AMC registration, or renewal of an AMC registration, the Criminal History Record Information will be provided as a hard copy and discussed only during executive session. All photocopies of the Criminal History Record Information will be shredded after the conclusion of the Board meeting.

      iv.iii.   If the Board denies an application based on Criminal History Record Information, the Board action will be entered into the database as "denied under Neb. Rev. Stat. § 76-2227 (4) and (5)" for appraiser applicants and "denied under Neb. Rev. Stat. § 76-3207" for Appraisal Management Company applicants.

15. Neither the letter, nor the Criminal History Record Information, shall be emailed to the individual subject to the Criminal History Record Check. In addition, the Criminal History Record Information shall not be discussed on the phone unless evidence is provided to verify that the phone conversation is between authorized NRPAB staff and the individual who is the subject of the Criminal History Record Information.

16. Criminal History Record Information will be shredded by staff or by a contractor under direct observation of staff two years after the date on which an application is withdrawn, denied, or approved, in accordance with Schedule 71.

NEWSLETTER

The Appraisal FOUNDATION

Authorized by Congress as the Source of Appraisal
Standards and Appraiser Qualifications

Summer is here!

May marked our spring Board of Trustees meeting in Indianapolis. It was so wonderful to see the energy and involvement of so many meeting participants, and I thought I'd give you an inside look at everything that happened.

It was a meeting of firsts in many ways. We recorded the public interviews for trustee candidates for the first time and held roundtables on important discussion topics to generate more engagement with trustees, meeting attendees and affiliated organizations. We received such great feedback on these changes and plan to replicate and identify further opportunities to make the meetings more interactive for all attendees.

Of course, one of the biggest highlights of the spring Board of Trustees weekend is also the appointment of new trustees. I am pleased to share that the Board of Trustees made the following appointments for terms beginning January 1, 2025:

- David Beard for a three-year term
- Krysta Gerstner for a four-year term
- Perri Guthrie for a three-year term
- Chris Rosenthal for a four-year term
- Bilal Shareef for a four-year term
- Steve Sherman for a three-year term

Here are five other big takeaways from the Board of Trustees meeting:

- **First Partner meeting:** Our 15 partner organizations held their first meeting together in Indianapolis. They had a productive discussion exploring opportunities to further collaborate including improving the partner nomination process, participating in the EGRPRA process, and identifying new projects to advance the appraisal profession.

In This Newsletter

From the President's Desk: An inside look at the spring Board of Trustees meeting

Updates from the AQB

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SAVVY Award Nominations are Open

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CARE Applications

Appraiser Talk

Calendar

June 25: Joint Council Meeting

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- **Signing Project REACH Diversity Pledge:** The Special Committee on Diversity, Equity, and Inclusion recommended, and the Board of Trustees approved, the Foundation sign Project REACH's new pledge to promote diversity in the appraisal profession. We are pleased to be an early signatory of this document and plan to promote the pledge at our upcoming joint council meeting to encourage other organizations affiliated with our organization to sign the pledge as well.
- **Code of Conduct:** The revised Standards of Conduct and Ethics for Persons Affiliated with The Appraisal Foundation was presented in a roundtable discussion with the Board of Trustees and meeting participants. This new code is the result of concerns raised at the February Appraisal Subcommittee hearing about our ethics policies.
- **Demographic Survey results:** The results of the 2024 demographic survey were also presented in a roundtable discussion with the Board of Trustees and meeting participants. The survey found that while the overall demographics of the profession are largely unchanged, the youngest generation of new appraisers is more racially and gender diverse. Of particular note, the 2024 results found a 50% increase in people identifying with a Hispanic, Latino, or Spanish origin compared to the 2021 survey, yet there is a tremendous amount of work to be done to improve demographics across the board. You can see a handout with a quick look at the survey results **here**. We will continue to repeat this survey every three years to measure the diversity of the profession.
- **Policy on Observer Conduct:** In the interest of building clear expectations for an environment of collegiality, collaboration and confidentiality with everyone who attends a meeting or private work session of one of the Foundation's boards, councils, or panels, the Oversight Subcommittee recommended the Board of Trustees adopt a Policy on Observer Conduct. The Board of Trustees approved the policy and all future meeting observers will be asked to acknowledge and agree to abide by the policy when they register for public meetings or attend a closed meeting.

This was such an energizing meeting as the Foundation looks to its work in the second half of this year. This innovative new format created real opportunities for connection and collaboration, and I hope it sets the tone for many meetings to come.

Sincerely,
Kelly Davids
President

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Congratulations to our newest trustees! From L to R, Steve Sherman, David Beard, Perri Guthrie, Chris Rosenthal, Krysta Gerstner, and Bilal Shareef.

Updates from the AQB

The Appraiser Qualifications Board has released a concept paper on the college degree requirement component of the qualification criteria. You can read the concept paper **here** and the reference material **here**. A webinar will be held on June 6th to review the concept paper and take public questions and comments. Please register for the webinar **here**.

The public comment deadline will be July 27th. Click **here** to submit your comments.

Apply for the Instructor Certification Course

The application for the Instructor Certification Course (ICC) is now live. The course will be offered from November 7th – November 10th, 2024, in Florida, exact location to be announced. The course will consist of two full days of instruction and conclude with a three-hour exam on Sunday morning. Course registration is based on a first-come first-served basis with a limit of 40 students. To apply, follow this link to **the ICC policies** to ensure you meet all required prequalifications then apply **here**. Any questions should be directed to Olivia Chalakani at olivia@appraisalfoundation.org.

SAVVY Award Nominations are Open

The Appraisal Foundation's Women's Forum is seeking qualified nominees for the Spirited Achiever of Valuation Vision, the Yeomans (SAVVY) Award for Excellence. Each year, this award will honor the significant contributions of a woman in the valuation profession, reflecting Edie Yeomans' tireless quest for excellence. Edith (Edie) Yeomans was an Appraisal Foundation Trustee and a prominent fine art appraiser. Her long and illustrious career was distinguished by a commitment to international volunteer service, including serving as Chair of the Foundation's Personal Property Resource Panel.

This award embodies the spirit of Edie's passion and dedication to serving the valuation profession though guidance and support for men and women across all appraisal disciplines. Edie's vision was to establish the Women's Forum to promote and support the unique needs of women in the valuation profession.

If you'd like to nominate someone for this award, click **here**. Nominations are due June 15th.

Partner Spotlight

American Society of Appraisers
Curious about the Impact of AI on Your Career?

Join ASA for the upcoming virtual ASAI Symposium on Thursday, June 27, 2024. This half-day event will cover a range of topics, from high-level discussions on AI use cases and emerging tools to an in-depth exploration of how AI interacts with USPAP. Valuation professionals will gain a clearer comprehensive of AI's implications in their field. Participants will: Understand the variety of current AI tools and their potential applications in valuation; Learn to use AI tools in compliance with established standards, ethical obligations, and best practices; and Recognize when it is appropriate or inappropriate to use AI tools and evaluate the risks and rewards involved. The symposium offers up to 3.0 hours of ASA CE/CPE credit and will be recorded. Register online **here** or call (800) 272-8258.

American Society of Farm Managers and Rural Appraisers
Join us at the ASFMRA's 2024 Education Week from July 14-20, where we'll introduce three new QE offerings for aspiring Certified General Appraisers, including Intro to Statistical Analysis, Report Writing & Case Studies, and Income Approach Part 2. The ASFMRA will also unveil six new CE seminars, providing opportunities to enhance your skillset on topics including permanent planting valuation, appraising Native American lands, rural sales analysis & verification, and more. Take the next step in your appraisal career by registering today at **asfmra.org/edu-week**.

International Society of Appraisers
Join ISA as we present our 3rd Annual Gems & Jewelry Symposium on June 21st. Open to members and non-members of ISA. Click **here** to register for the event.

North Carolina Professional Appraisers Coalition
The North Carolina Professional Appraisers Coalition (NCPAC), one of The Appraisal Foundation (TAF) Partners, is continuing to expand upon its Continuing Education (CE) program. We have our State-Certified Appraiser Education Instructors providing Continuing Education classes at convenient locations across the state. We are making a positive impact upon our profession by insuring that our members, and non-members alike, are up to date with the latest information available, as well as providing the attendees with more personal and engaging appraisal-related content.

CARE Applications

The Council to Advance Residential Equity (CARE), a council of fair housing, consumer, and civil rights advocacy nonprofits, is now accepting applications to join. Click **here** to learn more and apply.

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Appraiser Talk

Stay up to date on Appraiser Talk!

You can check out all episodes **here**.

You can subscribe to Appraiser Talk on Spotify, Apple Podcasts or wherever you get your podcasts. If you have a question you'd like to hear answered on the show, email it to Amy Kaufman at amy@appraisalfoundation.org.

About The Appraisal Foundation

The Appraisal Foundation is the nation's foremost authority on the valuation profession. The organization sets the Congressionally authorized standards and qualifications for real estate appraisers, and provides voluntary guidance on recognized valuation methods and techniques for all valuation professionals. This work advances the profession by ensuring appraisals are independent, consistent, and objective. More information on The Appraisal Foundation is available at www.appraisalfoundation.org.

Call for Applicants

**The Appraisal Foundation Seeks Candidates for
the Appraiser Qualifications Board and the Appraisal Standards Board**

Application Deadline is July 31, 2024

The Appraisal Foundation has begun its annual search for qualified candidates to serve on the Appraiser Qualifications Board (AQB) and the Appraisal Standards Board (ASB). Each board may have up to nine members. There are up to four open seats on the AQB and up to three open seats on the ASB that are eligible for appointment or reappointment.

"The ASB and AQB play a critical role in upholding public trust in the appraisal profession. This is a unique opportunity for those with an interest in advancing the profession to shape its future by developing standards and qualifications of excellence," said Kelly Davids, president of The Appraisal Foundation.

Background and Qualifications:

The Appraiser Qualifications Board (AQB) is responsible for establishing the minimum education, experience, and examination qualification criteria for real estate appraisers to obtain a license or certification. Also, the AQB sets the minimum requirements for real estate appraisers to maintain their state credential. The AQB also establishes minimum requirements for personal property appraisers, and adherence to the personal property criteria is mandatory for Foundation Sponsors who confer personal property appraiser designations. Proficient understanding of appraiser qualifications and of the minimum knowledge, skills, and abilities needed by those entering the

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profession is a prerequisite of service on the AQB, and a minimum of ten years of appraisal experience is required.

The Appraisal Standards Board (ASB) is charged with developing, interpreting, and amending the *Uniform Standards of Professional Appraisal Practice* (USPAP). Demonstrated proficiency in USPAP is a prerequisite of service on the ASB and a minimum of ten years of appraisal experience is required.

The AQB and ASB each hold in-person two-day work sessions twice a year, with additional work sessions held virtually as needs arise. The meetings are typically held in Washington, DC but at times are held in other locations in conjunction with meetings of Foundation stakeholders. The Boards also hold half-day virtual public meetings two to three times per year and monthly two-to-three-hour conference calls.

Individuals serving on the Boards are compensated for their time and are reimbursed for travel expenses. Those individuals selected for a position on the AQB or ASB will serve initial terms of one to three years commencing January 1, 2025.

The Boards Nominating Committee of the Board of Trustees seeks proven leaders of the appraisal profession from a variety of disciplines and background to fill positions on these Boards.

How to Apply:

Click **here** to complete the online application or visit www.appraisalfoundation.org Go to the About Us tab > Get Involved section to complete an online application.

Questions or More Information?

If you have questions, please feel free to contact Arika James at: arika@appraisalfoundation.org or via phone at 202-624-3072.

About The Appraisal Foundation

The Appraisal Foundation is the nation's foremost authority on the valuation profession. The organization sets the Congressionally-authorized standards and qualifications for real estate appraisers, and provides voluntary guidance on recognized valuation methods and techniques for all

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valuation professionals. This work advances the profession by ensuring appraisals are independent, consistent, and objective. More information on The Appraisal Foundation is available at www.appraisalfoundation.org.

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Upzoning and Questions Related to Appraiser Qualifications Q&As

In a joint collaboration, the Appraisal Standards Board (ASB) and the Appraiser Qualifications Board (AQB) have each offered their insights on upzoning and appraiser qualifications from their unique expertise.

Appraisal Standards Board

2024 USPAP

Question: My state requires appraisers to be credentialed and to comply with USPAP. The scope of practice for a Certified Residential credential is limited to residential one-to-four-unit properties. Many residential properties in my state have recently been upzoned beyond four units. Does USPAP allow any appraiser who holds a Certified Residential credential to complete an appraisal assignment for these upzoned properties?

Answer: USPAP does not address issues regarding the scope of practice as restricted by your state-issued credential. If an appraiser is limited in scope of practice as a matter of law or regulation, he or she must comply with that requirement under the COMPETENCY RULE which requires recognition of, and compliance with, laws and regulations that apply to the appraiser or the assignment.

Appraiser Qualifications Board

2024 *Criteria*

Question:
I am currently appraising properties in an area that has undergone rezoning. Previously, the zoning allowed for the construction of between one and four residential units on the lots. However, the new zoning permits up to six residential units to be built on these properties. As a Certified Residential Appraiser, does my credential allow me to appraise these rezoned properties?

Answer:
The AQB does not define your scope of practice. Individuals should reference agency regulations and state laws to determine the scope of practice for Certified Residential (or Licensed) appraisers and the types of properties that may be

appraised.

The *Criteria* states the minimum qualifications for credential holders and the types of properties they are qualified to appraise. However, it's essential to note that the Federal Financial Institutions Regulatory Agencies, along with other agencies and regulatory bodies, extend the authority of the Certified Residential (or Licensed) classification to appraise properties beyond those specified within these *Criteria.*

R.10

From:	Jonathan Stewart
To:	Kohtz, Tyler
Subject:	Re: Criteria Q&A Question
Date:	Monday, May 20, 2024 9:40:11 AM
Attachments:	image001.png
	Outlook-signature_.png
	Outlook-A picture .png
	Outlook-Logo Desc.png
	Outlook-Icon Desc.png
	Outlook-Icon Desc.png

Good morning, Tyler.

Thank you again for reaching out for clarification about this question. This is a relatively new issue that has come up in other states. Additional information from the ASC may be forthcoming, but for now, here is what I can tell you:

1. For further information on the scope of practice for the Licensed Residential and Certified Residential real estate appraiser classifications, please refer to Guide Note 3 in the AQB *Real Property Appraiser Qualification Criteria*.
2. If a State chooses to permit a Licensed Residential or Certified Residential appraiser to perform a *component* of an appraisal assignment for a property that may exceed the scope of practice for the appraiser's credential, the appraiser must perform that component in full compliance with USPAP, including the Competency Rule.

Another thing to consider is that a state could allow a different scope for non-FRTs (i.e., Guide Note 3), assuming the appraiser must comply with all other requirements (e.g., USPAP, state law, etc.).

As I mentioned, this is a relatively new and fluid issue. More information may be coming in the future, but hopefully this information helps.

Thanks,

Jonny Stewart
Policy Manager
O 202.792.1197
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1325 G St NW #500
Washington DC 20005

APPRAISAL
SUBCOMMITTEE
FFIEC

From: Kohtz, Tyler <tyler.kohtz@nebraska.gov>
Sent: Wednesday, May 15, 2024 11:46 AM
To: Jonathan Stewart <Jonathan@asc.gov>
Subject: Criteria Q&A Question

Hi Jonny,

I need some clarification regarding the AQB's April 14, 2024 Criteria Q&A shown below:

2024 Criteria
Question:
I am currently appraising properties in an area that has undergone rezoning. Previously, the zoning allowed for the construction of between one and four residential units on the lots. However, the new zoning permits up to six residential units to be built on these properties. As a Certified Residential Appraiser, does my credential allow me to appraise these rezoned properties?

Answer:
The AQB does not define your scope of practice. Individuals should reference agency regulations and state laws to determine the scope of practice for Certified Residential (or Licensed) appraisers and the types of properties that may be appraised.

The Criteria states the minimum qualifications for credential holders and the types of properties they are qualified to appraise. However, it's essential to note that the Federal Financial Institutions Regulatory Agencies, along with other agencies and regulatory bodies, extend the authority of the Certified Residential (or Licensed) classification to appraise properties beyond those specified within these Criteria.

12 U.S.C. 3342(2) states, "1-to-4 unit, single family residential appraisals may be performed by State licensed appraisers unless the size and complexity requires a State certified appraiser, where a complex 1-to-4 unit single family residential appraisal means an appraisal for which the property to be appraised, the form of ownership, the property characteristics, or the market conditions are atypical."

Language found in the Criteria under the general requirements for the certified residential classifications:

I.   General (P. 20)
        A. The Certified Residential Real Property Appraiser classification qualifies the appraiser to appraise one-to-four
        residential units without regard to value or complexity.
                1. The classification includes the appraisal of vacant or unimproved land that is utilized for one-to-four
                residential units purposes or for which the highest and best use is for one-to-four residential units.
                2. The classification does not include the appraisal of subdivisions for which a development analysis/appraisal
                is necessary.
        B. All Certified Residential appraisers must comply with the COMPETENCY RULE of USPAP.

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Unless I am missing something, the answer to this question creates a disconnect. Although Title XI does not specifically state that a certified residential classification cannot appraise more units for a federally regulated transaction, the Criteria limits the number of units allowed by the certified residential classification by defining the certified general classification as qualified to appraisal all types of real property and defining the certified residential classification as qualified to appraise one-to-four residential units. How could the authority regarding the number of units for the certified residential classification be extended for a federally regulated transaction? I couldn't imagine that the ASC would consider its laws and rules compliant with Title XI and the ASC Policy Statements if it changed the Scope of Practice in Nebraska:

The scope of practice for a certified residential real property appraiser shall be limited to real property appraisal practice concerning residential real property or real ~~estate having no more than four residential units, if any, without regard to transaction value or complexity~~. The appraisal of subdivisions for which a development analysis or appraisal is necessary is not included in the scope of practice for a certified residential real property appraiser.

Is there something that I am missing in my thought process?

Regards,

Tyler N. Kohtz
Executive Director
Nebraska Real Property Appraiser Board
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Phone: (402) 471-9015
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Website: appraiser.ne.gov
Visit NRPAB on Facebook

Concept Paper - Assessment of College Degree Requirements within the *Criteria*

May 28, 2024

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Join the Conversation

Appraisal Qualifications Board (AQB) Chair Brad Swinney, AQB Vice Chair Jerry Yurek, and Appraisal Foundation (Foundation) Vice President of Appraisal Issues Lisa Desmarais will host a webinar to discuss this Concept Paper on June 6, 2024, at 1:00 PM ET (10:00 AM PT). Register **here** to attend the webinar.

All interested parties are encouraged to comment in writing to the AQB before the deadline of July 27, 2024. Each member of the AQB will thoroughly read and consider all comments.

Send Your Comments by July 27, 2024

To submit your responses to question and comments, please visit:
https://www.surveymonkey.com/r/AQBComments

While for ease of processing, we prefer you use the SurveyMonkey for your comments, if you are unable to provide your comments via SurveyMonkey, you may also email AQB@appraisalfoundation.org.

Welcome

We invite all stakeholders to participate in a crucial discussion regarding a matter of significant importance in our field: determining the correct amount of education needed for individuals to quality for trainee, license, or certification credentials as a real property appraiser. As one of the stewards of the appraisal profession qualifications, we are examining the requirements in the *Real Property Appraiser Qualifications Criteria (Criteria).* And in doing so, this endeavor demands our commitment to understanding important issues to be able to reach resolute solutions.

We urge you to join us in this important endeavor by reading both this Concept Paper and its companion Reference Material, so that you can prepare and provide your feedback and thoughts to us. On the following pages you will find a brief summary of how we are planning to reassess the qualification criteria, followed by some thoughts for you as you prepare your feedback, a high-level explanation of the current *Criteria* (and its history), and a series of questions we would like you to consider.

Your participation at this early stage is essential, and we express our gratitude for any feedback you choose to provide to us in this pursuit.

If you have any questions, please contact the Board at AQB@appraisalfoundation.org.

Brad Swinney
Chair, Appraiser Qualifications Board

Reassessing the Criteria
Project Overview

Last year, the AQB initiated a project to conduct a holistic review of the *Real Property Appraiser Qualification Criteria* (*Criteria*). After decades of evolution and input from diverse stakeholders, a thorough reevaluation of the *Criteria* was deemed necessary to ensure that the qualification requirements remain relevant. This consideration includes advancements in technology, shifts in the appraisal regulatory landscape, and aligning with the expectations of both the public and stakeholders regarding the qualifications of newly credentialed appraisers.

To facilitate this complex undertaking, the AQB devised a holistic work plan establishing clear milestones to ensure progress while allowing flexibility in deliverables.

The plan is comprised of three main phases:

- Phase one includes reassessing the importance and worth of college requirements, and related requirements as part of the *Criteria*.
- Phase two explores the potential of allowing experience from related professions as a potential alternative pathway to meet qualifications within the *Criteria*.
- Phase three studies the structure and requirements of the National Exams for each of the credentials.

Therefore, the initial phase of this reassessment, and the main topic this Concept Paper addresses, entails revisiting college requirements. Stakeholders have recently urged the AQB to eliminate these requirements. In response, the AQB has recognized that this request is just one aspect of a broader inquiry.

This broader inquiry involves understanding that college-related requirements are interconnected with other criteria. Acknowledging the interrelated nature of the requirements within the *Criteria*, discussions in each phase delve into details across different aspects of the *Criteria* as needed.

The project adopts an open and participatory research approach, integrating collaborative problem-solving and public engagement. To ensure transparency, collaboration, and the best possible result, the AQB commits to issuing discussion drafts, hosting listening sessions, and reaching out to stakeholders to gather diverse viewpoints.

Providing the AQB's present perspectives is crucial for ensuring stakeholders understand the starting point of this project. The AQB viewpoints are presented, therefore, not as commitments to retain those viewpoints, but as an invitation for others to offer different perspectives, allowing insight into areas where *Criteria* requirements

may need updating. The AQB is dedicated to gathering and analyzing new and diverse viewpoints, obtaining feedback, and a public discussion of our thought process throughout this project utilizing the routine mechanisms already in place.

The AQB's overall goal of this reassessment project is to explore:

Whether the Real Property Appraiser Qualification Criteria includes only essential qualification requirements.

A Brief History of College Requirements: in Context

The question of whether college requirements should be part of the *Criteria* appears straightforward on the surface, however, the question is intertwined with broader considerations regarding the necessity of various requirements within the *Criteria*. The question is not simply a matter of yes or no, rather it is a nuanced issue that demands a holistic evaluation of the entire framework.

At the center lies this crucial inquiry: ***Are only essential requirements included in the Real Property Appraiser Qualification Criteria?*** Acknowledging this query encompasses the entire *Criteria*, for this phase, we are focused on the requirements that include college level course work or degrees.

The college requirements[1] have been a part of the *Criteria* (in one form or another) since the AQB initiated public discussion of these requirements in 2001, formal adoption in 2004, and subsequent implementation in 2008.[2]

In March 2001, when deliberations on college-related prerequisites commenced, the AQB observed a clear consensus from stakeholders expressing support for such requirements.[3] This included the ASC member agencies unanimously advocating for college degree requirements primarily in the interest of reinforcing public trust in appraisal practice.[4] At that time, this overall consensus prompted the AQB to seriously consider parts of the *Criteria* including college related requirements.

With this in mind, it is necessary to contextualize the AQB and stakeholder views. In 2001, the AQB became aware of the increasing prevalence of appraisal fraud, unprofessional behavior, and inadequate regulatory enforcement.[5] College degree requirements were initially considered (by the AQB and other stakeholders) as one measure the AQB could take to combat this issue and uphold public trust.

Upon the implementation of the January 2008 *Criteria*, which included college requirements, the market's response did not involve a desire to relax restrictions but rather there was a trend towards imposing even stricter limitations.[6]

It is important to recognize significant support for these requirements began in the early 2000s. This support was observed amidst changing market conditions and regulatory responses following the 2008 subprime lending crisis and subsequent market crash.[7] Subsequently, a heightened awareness of the contributing role of the appraiser led to an increased demand for increased qualifications. However, as we neared 2015, when

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[1] See section 6.4 *("College Related Requirements- By Credential")* in the Reference Material.
[2] See section 6.2 ("Meetings and Opinions about College Related Requirements") in the Reference Material.
[3] See section 6.2 (*"2-9-2001 Public Meeting")* in the Reference Material.
[4] See section 6.2 (*"2-5-2001 ASC Comments")* in the Reference Material.
[5] See section 13 ("*Enforcement- Appraisal Fraud*") in the Reference Material.
[6] See section 10.1 ("January 1, 2008: New Criteria adopted in 2004 goes into effect," "January 8, 2008: HUD acknowledges Criteria changes and requires appraisers to comply," and "December 17, 2008: HUD announces it will no longer allow Licensed appraisers to do FHA work") in the Reference Material.
[7] See section 10.1 ("2010: Dodd-Frank and Appraises Now Moved to Work under AMC's") in the Reference Material.

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the mortgage market was in a full upswing and the perception of appraisal issues were in the rearview mirror, the support for college related requirements diminished.[8]

Subsequently there was considerable emphasis given to the issuance of well-supported appraisals,[9] throughout the improving underwriting process as well as in the secondary market. This has had a positive impact on the profession, serving as a check and balance.[10] The enforcement process has continued to substantially improve.

This historical perspective is crucial to consider as we deliberate the question of whether, in some instances, appraisers should continue to be required to meet college requirements. And this discussion necessitates an understanding of these requirements within the broader framework of the *Criteria* as a whole. We must not forget to consider the challenges the *Criteria,* as it evolved, aimed to mitigate[11] and prevent them from reoccurring in the market.

We must balance the historical implementation of requirements with consideration as to whether other aspects of the *Criteria* adequately address the concerns for which they were first enacted.[12] In safeguarding public trust, any decisions regarding college requirements for appraisers must account for the broader operational context.

The debate surrounding college requirements underscores the need to delve deeper into their implications. Critics argue against such requirements, suggesting that possessing a college degree, or having taken college level courses, may not inherently correlate with being qualified. They advocate for exploring alternative pathways to qualification, highlighting concerns, for example, about potential unnecessary barriers to entry for individuals from diverse backgrounds.[13]

Conversely, proponents of the college requirements prerequisites emphasize the value of higher education in fostering critical thinking, analytical skills, and a comprehensive understanding of the real estate market—all vital aspects for effective appraisal practice.[14] They assert such requirements set a baseline standard, ensuring that minimum qualifications within the profession are maintained.

Considering these contrasting viewpoints, it is crucial to clearly define the problem to be solved and to consider the broader ramifications of any proposed changes. Any alterations must strike a balance, aiming to promote professionalism, maintain true minimum qualifications, and foster diversity and inclusion within the appraisal profession.

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[8] See section 6.2 *("2016: 2-26-2016 Discussion Draft*) in the Reference Material.
[9] See section 12.2 ("*Enforcement data- States and Territories*"), section 10.2 ("*Technology Changes Helped Regulation*"), and section 9.3 ("*Quality of Appraisers")* in the Reference Material.
[10] See section 15.2 *("Faulty Appraisals Addressed")* in the Reference Material.
[11] See section 10 ("*The Economy, Events, and Issues")* in the Reference Material.
[12] See section 10 ("*The Economy, Events, and Issues*") in the Reference Material.
[13] See section 9.3 ("*Diversity of Appraisers*") in the Reference Material.
[14] See section 6.3 ("*College Requirements*") in the Reference Material.

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Therefore, when contemplating college requirements, it is essential to analyze their role holistically within the *Criteria*. It is imperative to assess whether they align with the overarching goal of promoting public trust and effectively address the key issues that prompted enhancements to the *Criteria* over time.

Please see the attached questions for your consideration. The questions are a starting point to facilitate thought. We welcome your input regardless of whether it fits a question or not.

College Related Requirements

Below is a condensed summary of the current[15] college related requirements:

Licensed Residential (LR)*	Certified Residential (CR)	Certified Geneal (CG)
There are no college related requirements.	**A bachelor's degree (in any field of study) is one option.** **An appraiser can gain a CR with no college related education by having held an LR for a minimum of five years.*[16]** If the person chooses not to hold a LR for five years,* then they have five other **options** related to college level education:[17] 1. Associated Degree in a specific field of study. 2. Thirty semester hours of college courses in specific topic areas 3. Thirty semester hours of CLEP exams in specific topic areas. 4. Any combination of #3 and #4.	**A bachelor's degree (in any field of study) is required.**

If a state does not offer a Licensed credential, those individuals do not have the option to complete five years of Licensed experience to upgrade to a Certified credential.

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[15] Appraiser Qualifications Board, Real Property Appraiser Qualification Criteria Effective January 1, 2022 (January 2022), The Appraisal Foundation, pp. 17, 19, 20, and 23, accessed at https://appraisalfoundation.sharefile.com/share/view/s63f99dc2b9f241e0b3fd1645f7b63680.

[16] The entire requirement is shortened here. To view the full requirement, please refer to the Criteria.

[17] The entire requirement is shortened here. To view the full requirement, please refer to the Criteria.

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Our Request of You

Please provide your input. All types of input are needed. We invite active engagement in this process and encourage input on our project philosophy and direction. Constructive feedback is vital for shaping the project's trajectory. We appreciate the diverse perspectives stakeholders bring. We seek understanding of how your views may differ, or align, with ours and why.

A few examples of ways to engage include:

1. You can share thoughts on presented philosophical underpinnings of the requirements in the *Criteria*.

2. You can provide feedback on the proposed project plan and direction as appropriate, and suggest adjustments or alternative approaches.

3. You can identify potential gaps, areas for improvement, or aspects within the *Criteria* needing change, and why.

4. You can provide feedback in any other way you see fit.

Please note, examining how ideas for proposed changes align with goals, potential benefits, and the broader framework of the *Criteria* enriches any feedback you can provide. The Reference Material provides the context and information needed to form the type of suggestions in which the AQB is most interested.

Questions for You

Specific Questions Related to College Requirements

1) Should individuals be able to obtain any appraisal credential with no post-secondary education? Please explain why you hold your opinion.

2) Are there specific college related requirements that you believe make the CR and CG credentials too high? If yes, please elaborate.

3) If you do **not** believe an appraiser should have college requirements, should appraisers only be required to learn "appraiser specific education" and leave skills and competency development to be learned during the attainment of required experience? Please explain why you hold your opinion.

4) The LR credential is the only credential with no college related qualifications options or requirements. Yet very few lender clients (which are the first types of clients most residential appraisers can gain) will hire a LR. Do you believe the lack of a lenders willingness to hire LR's stems from a view of underqualification, or something else? Please clarify your belief.

5) Is there an imbalance in the *Criteria* regarding the college requirements differences between the LR and CR credentials, if so, what would you recommend doing to address this, and why?

6) If the college requirements were removed, would other requirements (more exams, more appraisal specific education, etc.) need to be adjusted to ensure the *Criteria* protects the public trust? Please provide rationale for your position.

General Questions

7) What training and abilities should an aspiring appraiser ideally possess to be credentialed? Why?

8) From your perspective as a user of appraisal services:

   a) What factors determine an appraiser's readiness for engagement?

   b) To what degree should the gap between minimal qualification and practicing competency be left for the appraiser and regulatory system to manage, assuming adequate enforcement measures?

   c) Are there gaps between existing qualifications and competency expected in the marketplace that need to be addressed? What gaps, if any, can you identify?