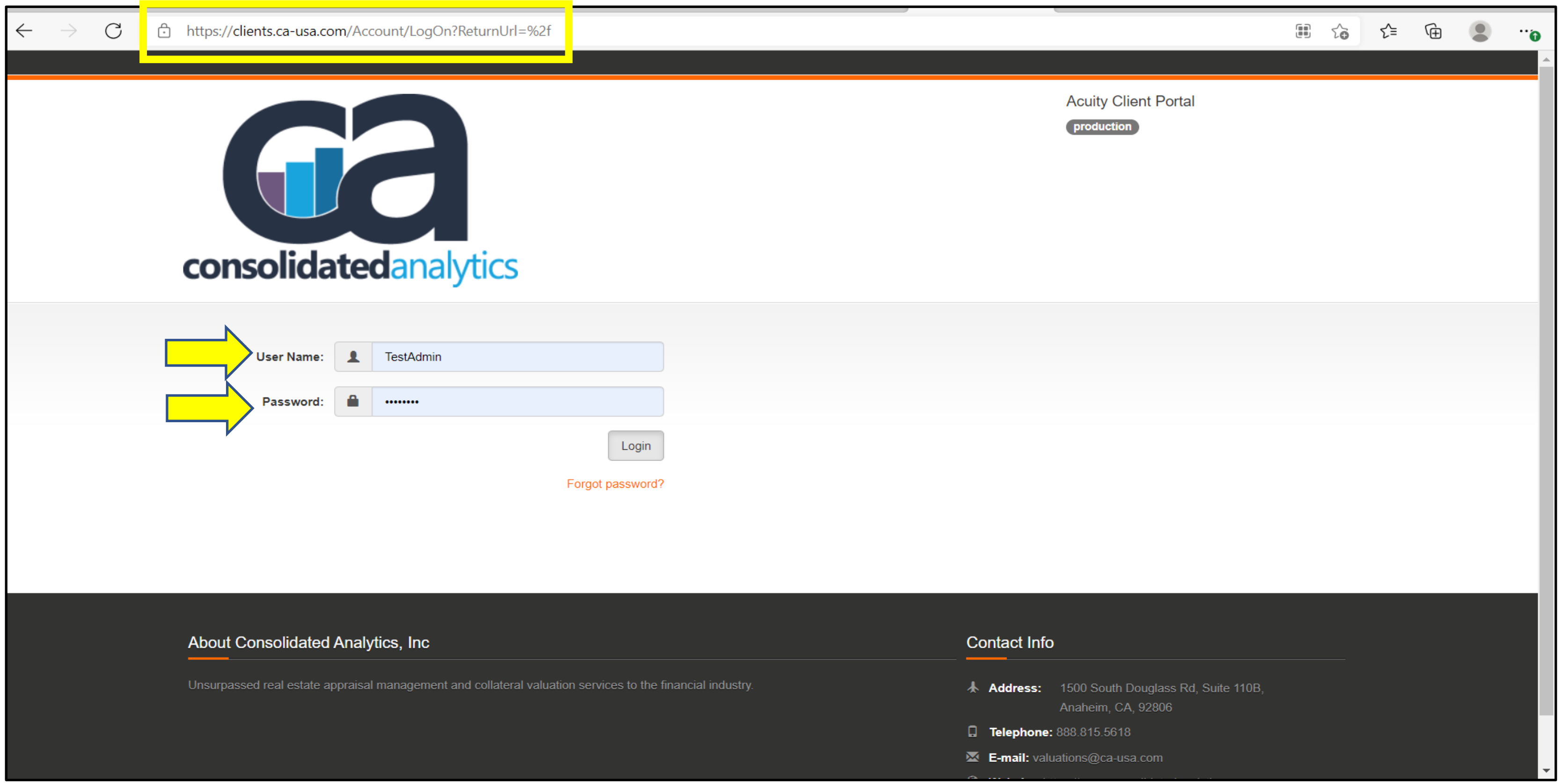
Client Portal User Guide

**Know your value.
Realize your potential.**

Logging In and Managing Your Password

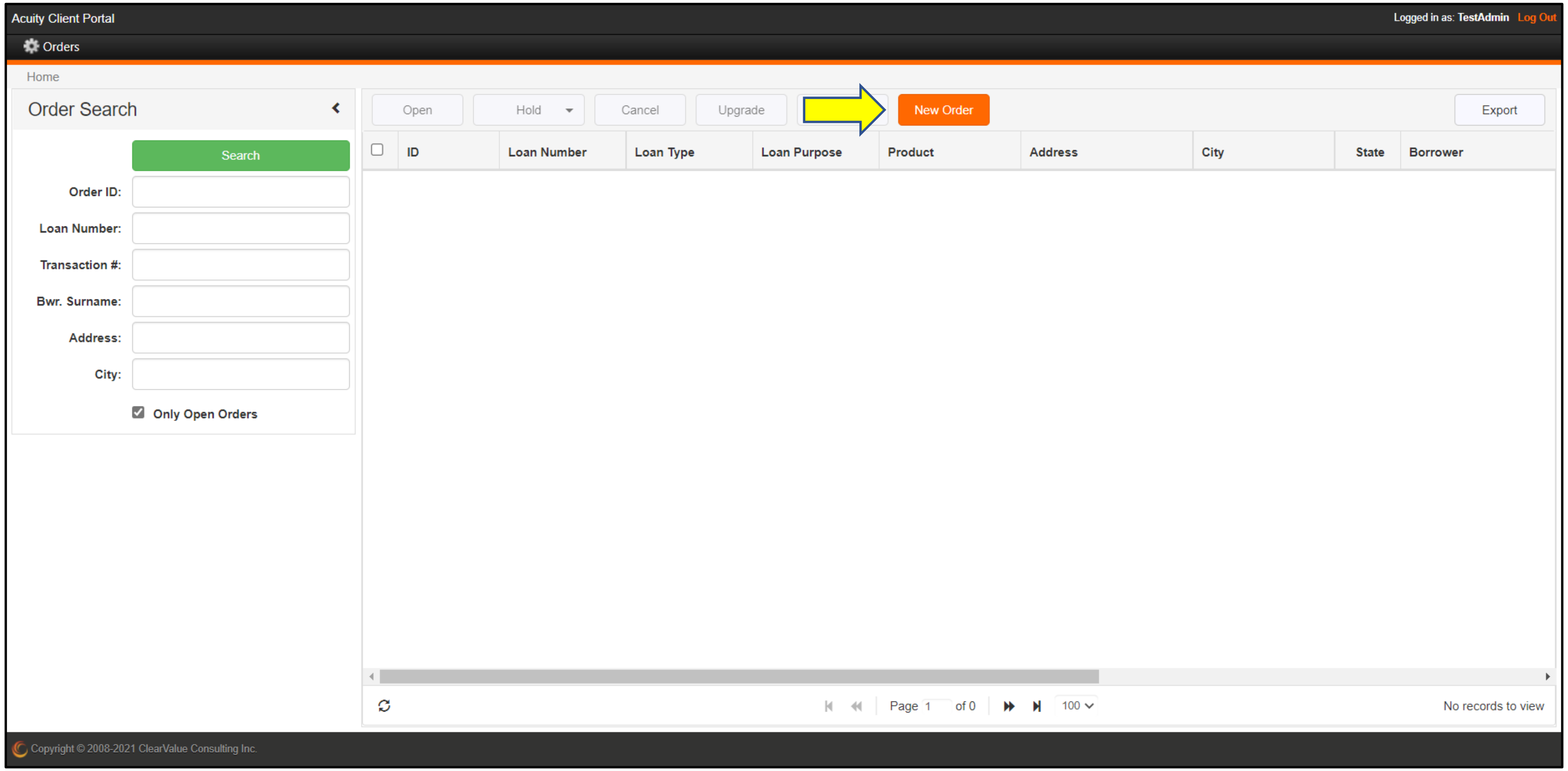
Step 1: Go to https://clients.ca-usa.com and login with Username and Password.

Step 2: If you forget your password and/or want to change your password, click the *Forgot password* link. An email will be sent to your address on file prompting you to make the change.



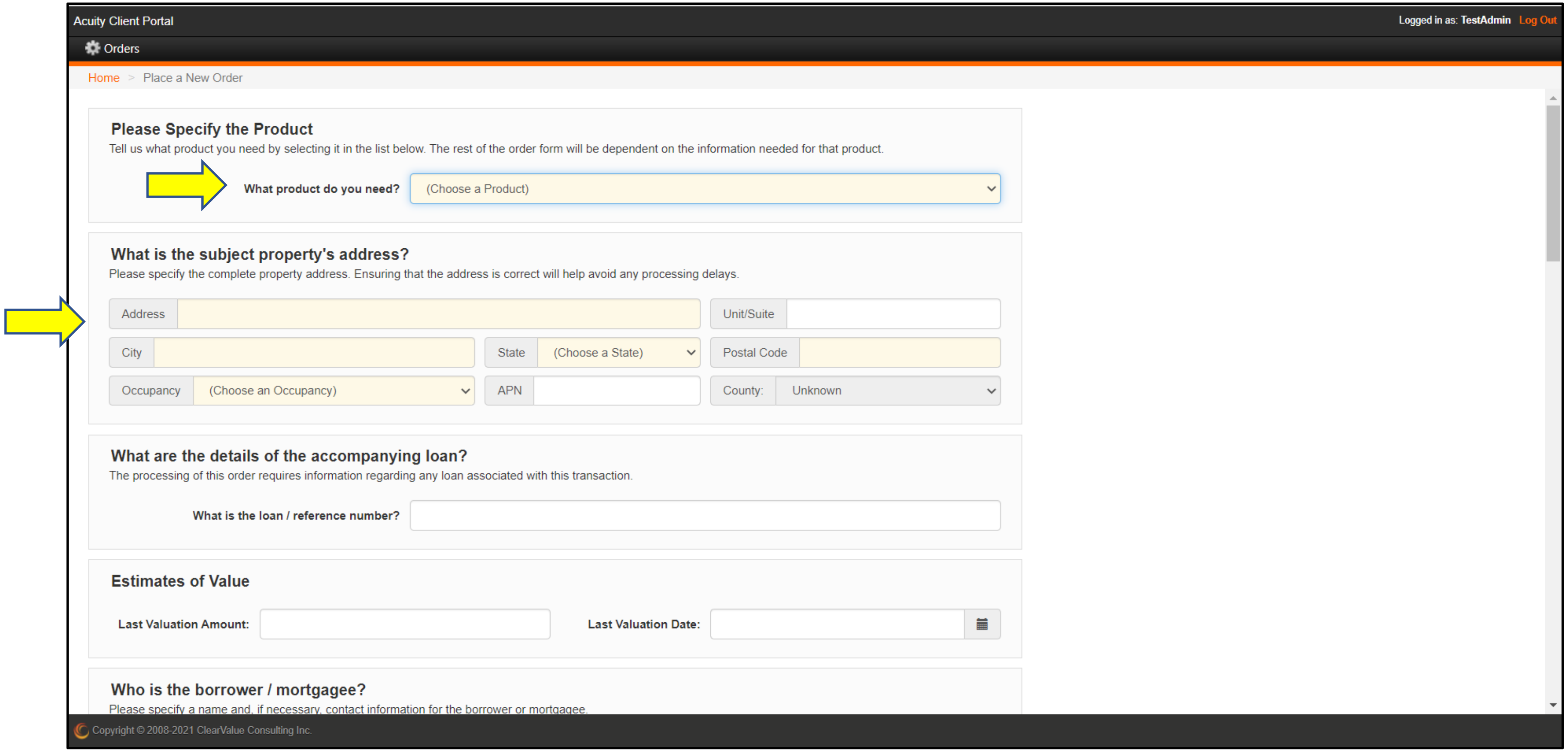
Placing A New Order

Step 1: Select *New Order*

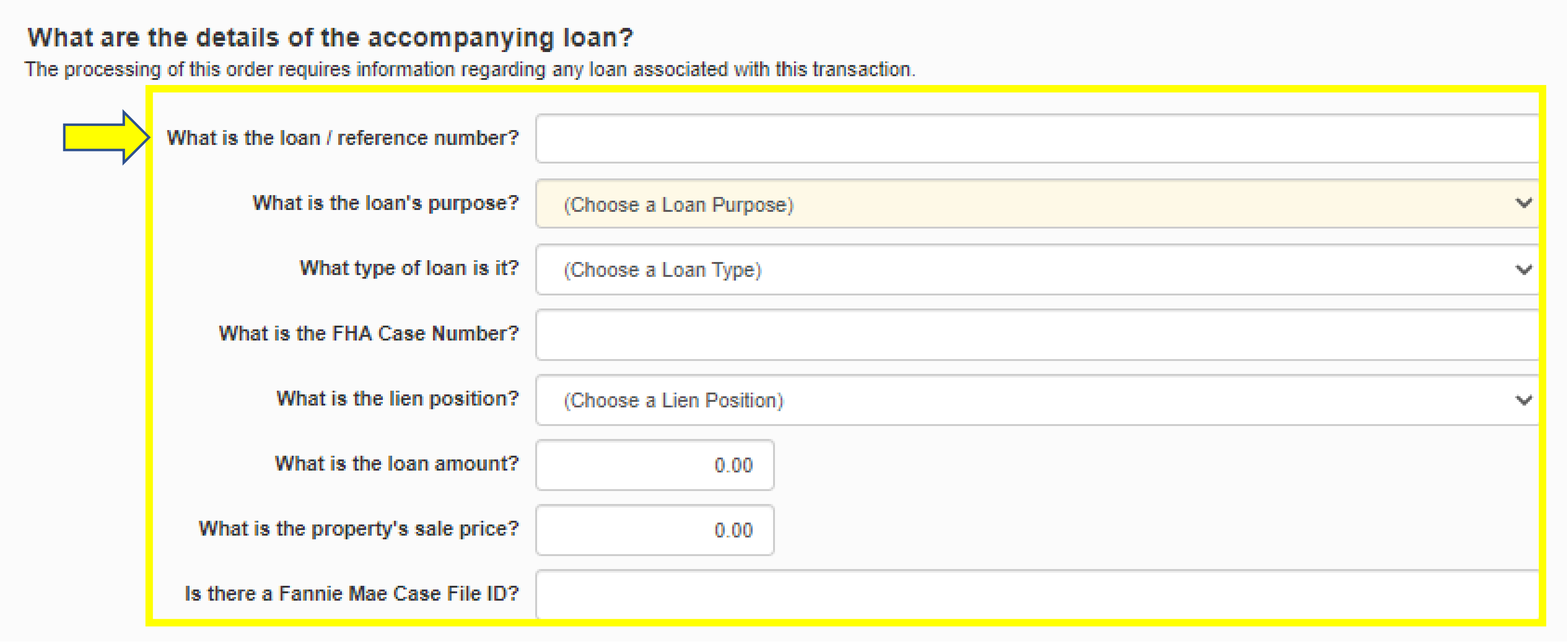


***Note – all fields highlighted in yellow are required**

Step 2: **Select a product from the dropdown**
Step 3: **Enter subject address**



Step 4: Enter pertinent loan details **** The loan/reference number is your internal identifier and should be entered on every order.**


What are the details of the accompanying loan?

The processing of this order requires information regarding any loan associated with this transaction.

What is the loan / reference number?

What is the loan's purpose? (Choose a Loan Purpose)

What type of loan is it? (Choose a Loan Type)

What is the FHA Case Number?

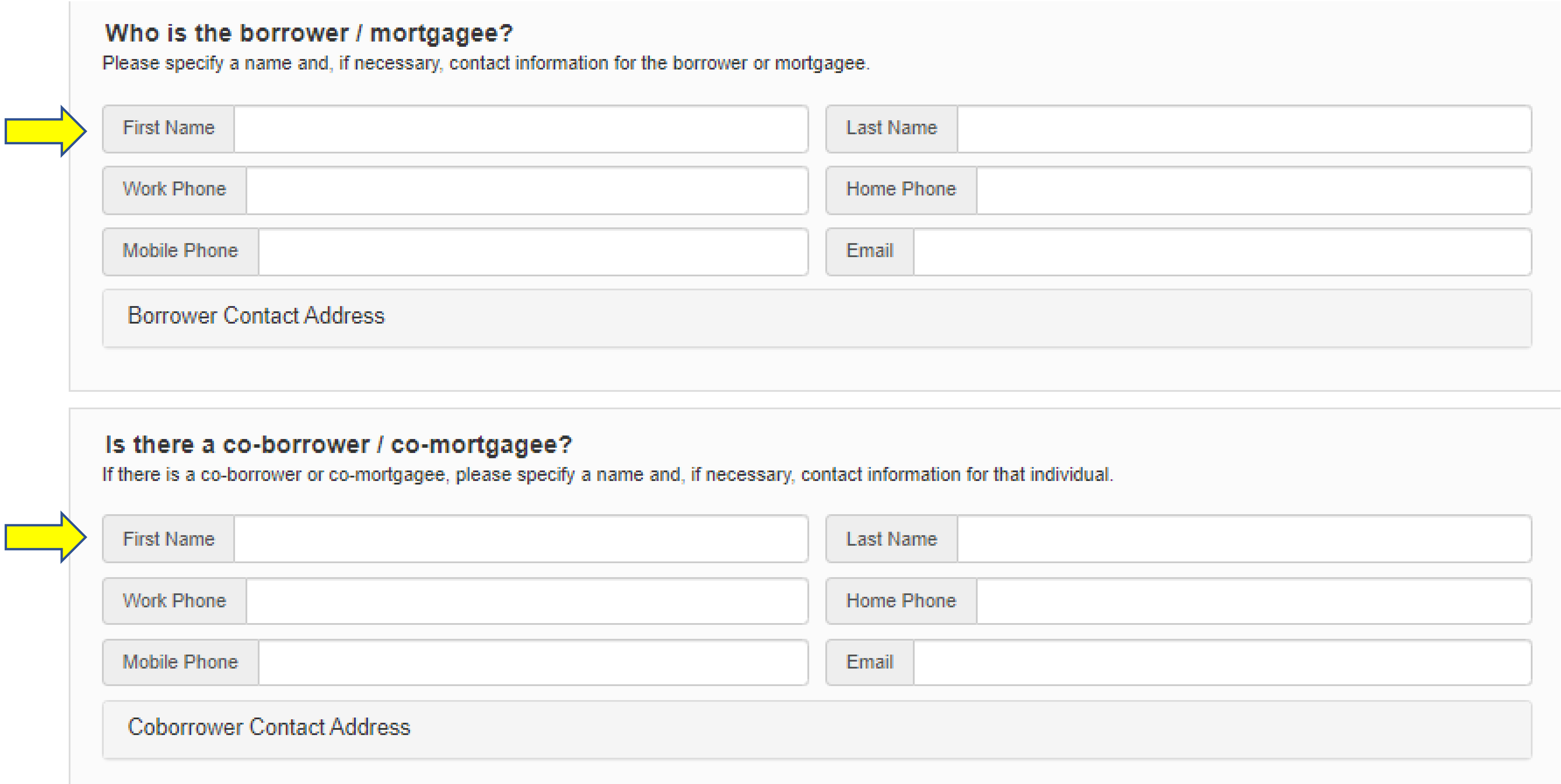
What is the lien position? (Choose a Lien Position)

What is the loan amount? 0.00

What is the property's sale price? 0.00

Is there a Fannie Mae Case File ID?

Step 5: Enter borrower / coborrower information



Who is the borrower / mortgagee?

Please specify a name and, if necessary, contact information for the borrower or mortgagee.

First Name | Last Name

Work Phone | Home Phone

Mobile Phone | Email

Borrower Contact Address

Is there a co-borrower / co-mortgagee?

If there is a co-borrower or co-mortgagee, please specify a name and, if necessary, contact information for that individual.

First Name | Last Name

Work Phone | Home Phone

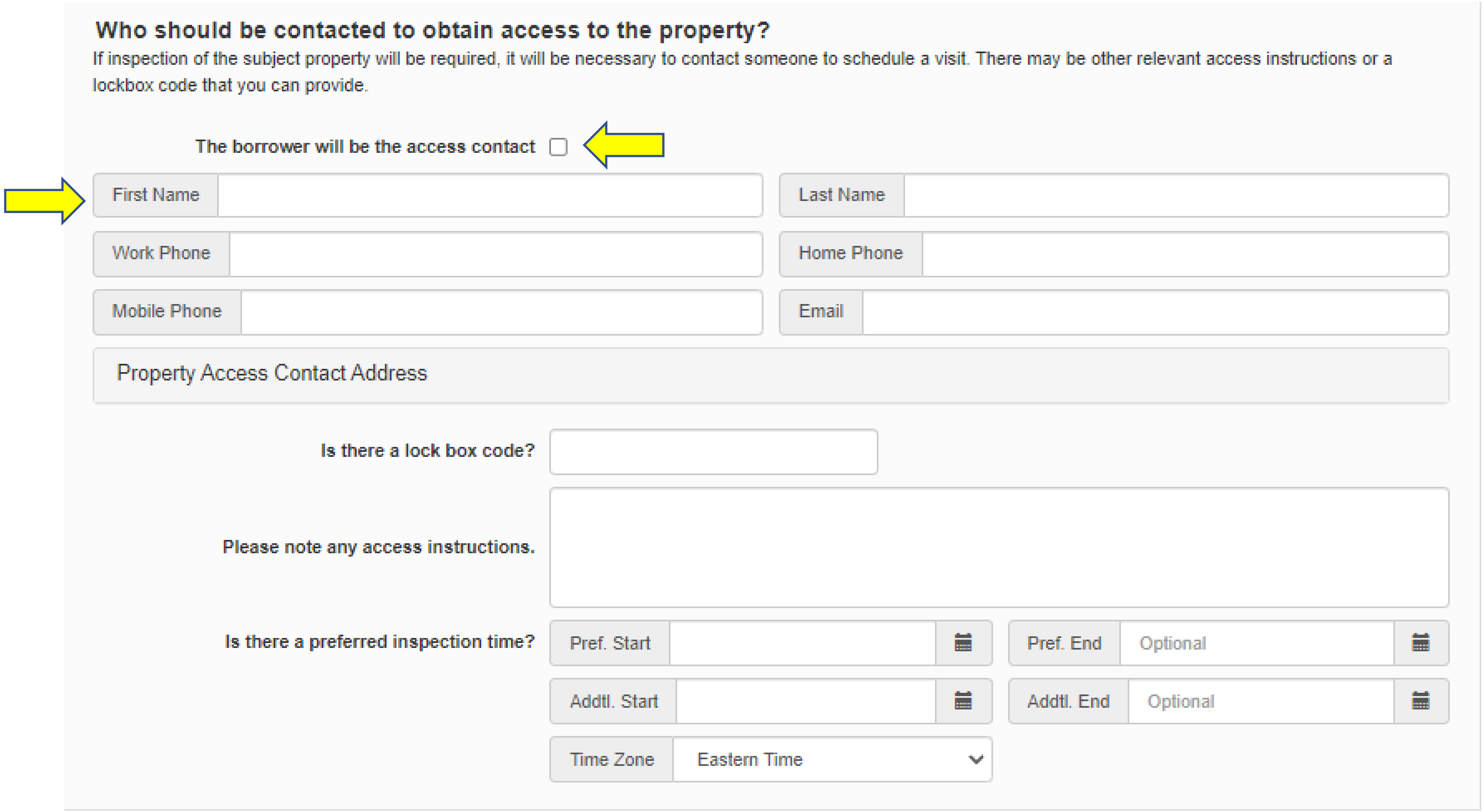
Mobile Phone | Email

Coborrower Contact Address

Step 6: Provide property access information when applicable

If the borrower will provide access, click the box indicating as such

If there is an alternate POC, please provide their contact information as well as a lock box code if applicable



Who should be contacted to obtain access to the property?

If inspection of the subject property will be required, it will be necessary to contact someone to schedule a visit. There may be other relevant access instructions or a lockbox code that you can provide.

The borrower will be the access contact ☐

First Name

Last Name

Work Phone

Home Phone

Mobile Phone

Email

Property Access Contact Address

Is there a lock box code?

Please note any access instructions.

Is there a preferred inspection time?

Pref. Start

Pref. End Optional

Addtl. Start

Addtl. End Optional

Time Zone Eastern Time

Step 7: Provide any special instructions specific to this order

Are there any special considerations for this order?

If you are aware of any special handling requirements for this order, please indicate those below.

This is a rush order ☐

This is a complex property ☐

This is a high-profile customer ☐

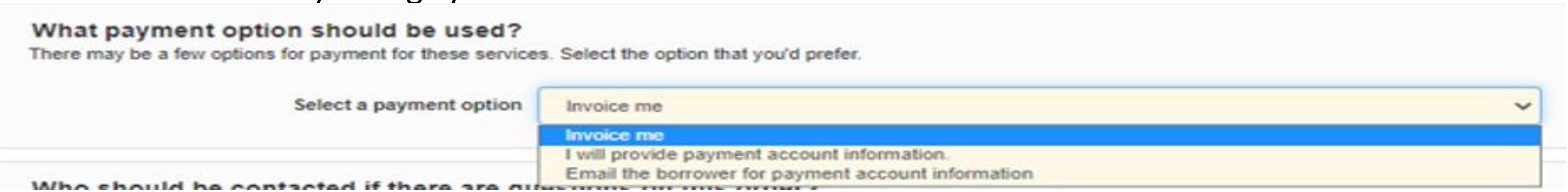
Side-by-Side Order ☐

Describe any special handling required.

Step 8: Select payment method

**** All options may not be available depending on how your account was initially set up**

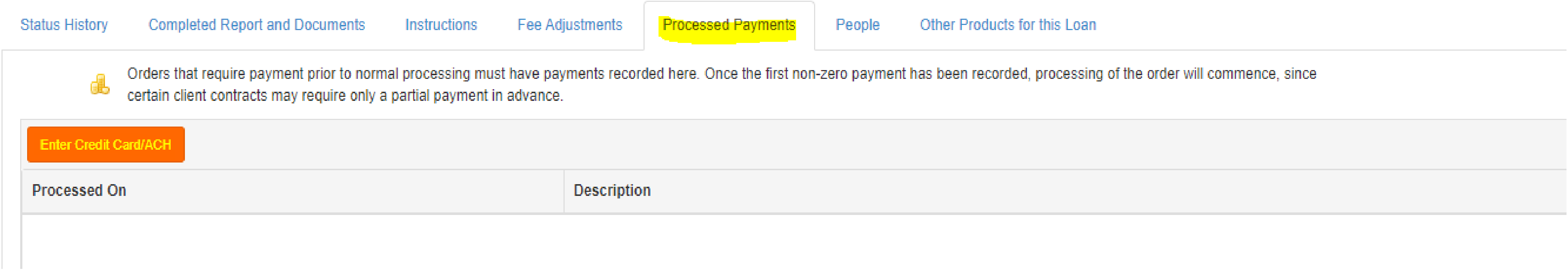
Invoice Me – Monthly billing cycle



You have two options for credit card payments.

1. ***I will provide payment account information*** – when this option is selected, you will enter the credit card information immediately after the order is created.

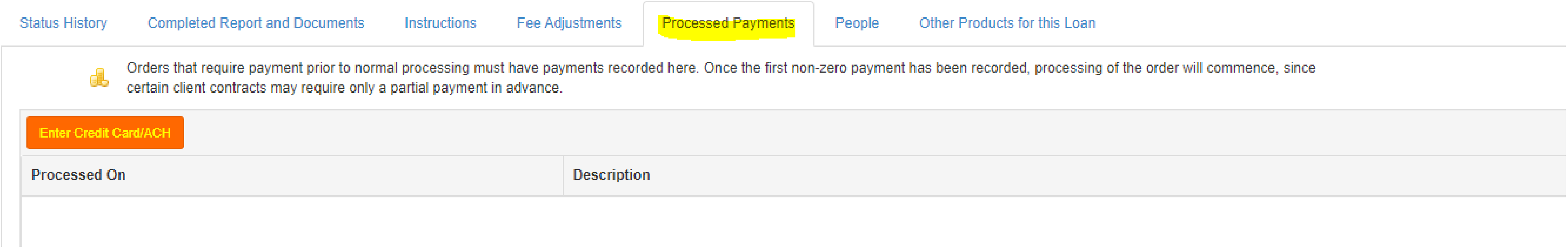
Upon order creation, the page will default to the below. Click the ***Processed Payments*** tab



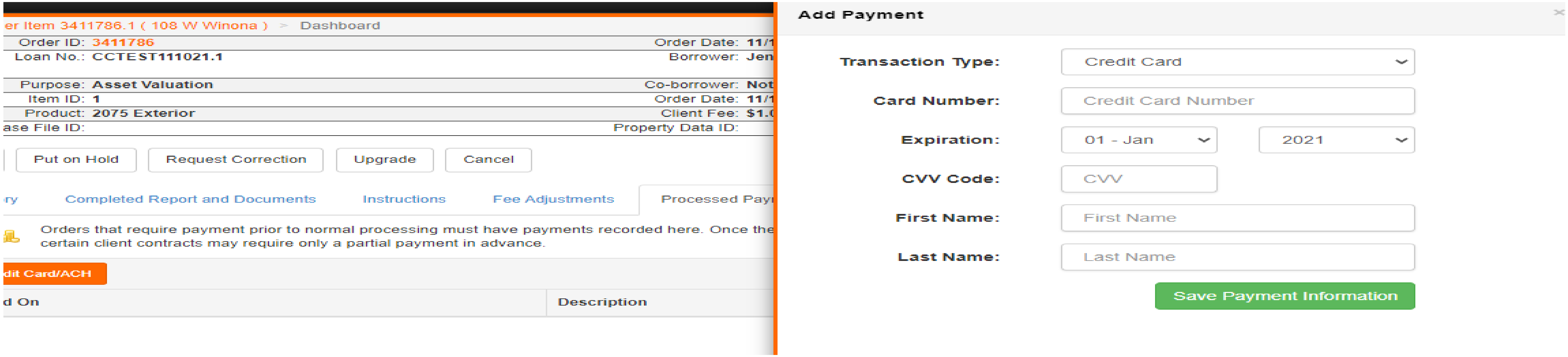
Step 8: Select payment method

**** All options may not be available depending on how your account was initially set up**

Select Enter Credit Card/ACH



Enter the credit card information and click *Save Payment Information.* ****Note – the order will remain on hold until payment is received***



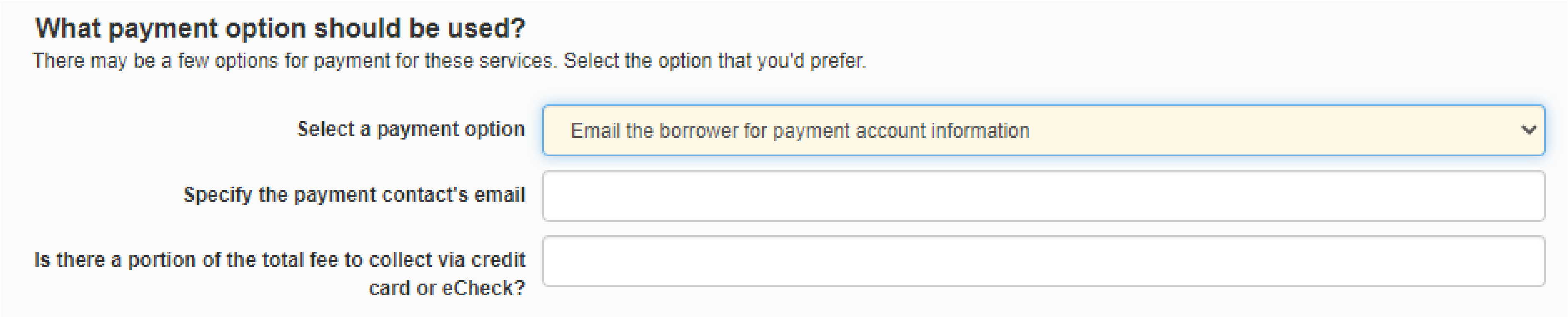
Step 8: Select payment method

**** All options may not be available depending on how your account was initially set up**

You have two options for credit card payments.

2. ***Email the borrower for payment account information*** – when this option is selected, you will enter the borrowers email address below. Once the order is created, a secure payment link will be emailed to the borrower.

****Note – the order will remain on hold until payment is received***



What payment option should be used?

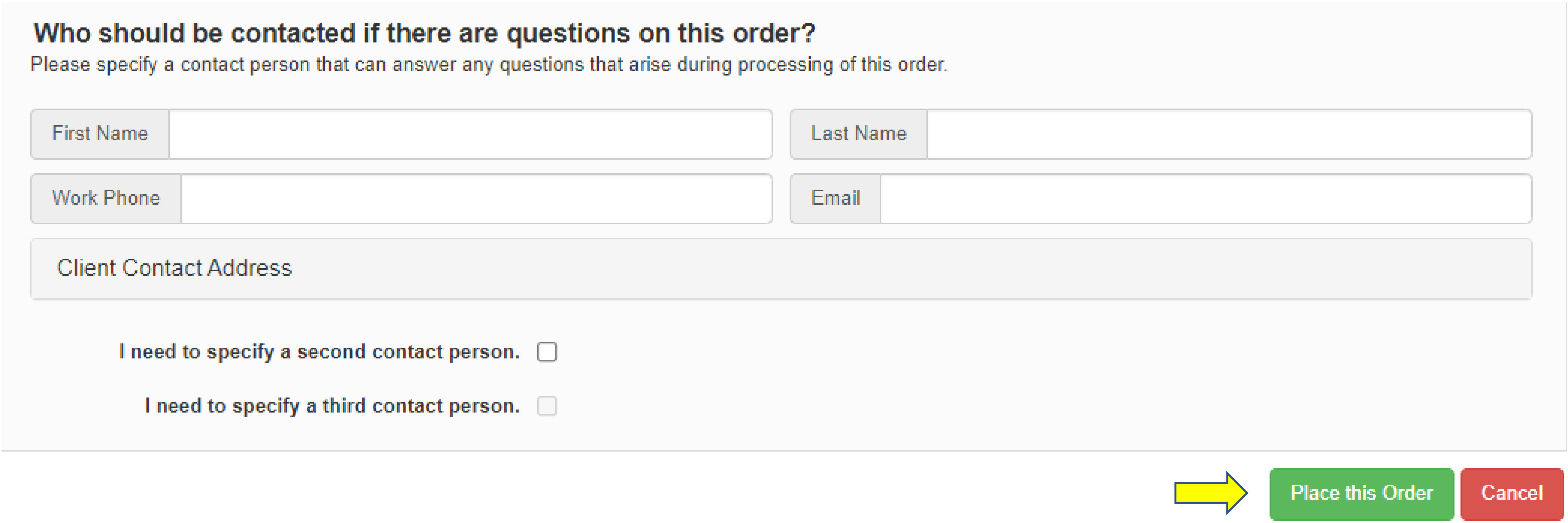
There may be a few options for payment for these services. Select the option that you'd prefer.

Select a payment option	Email the borrower for payment account information
Specify the payment contact's email	
Is there a portion of the total fee to collect via credit card or eCheck?	

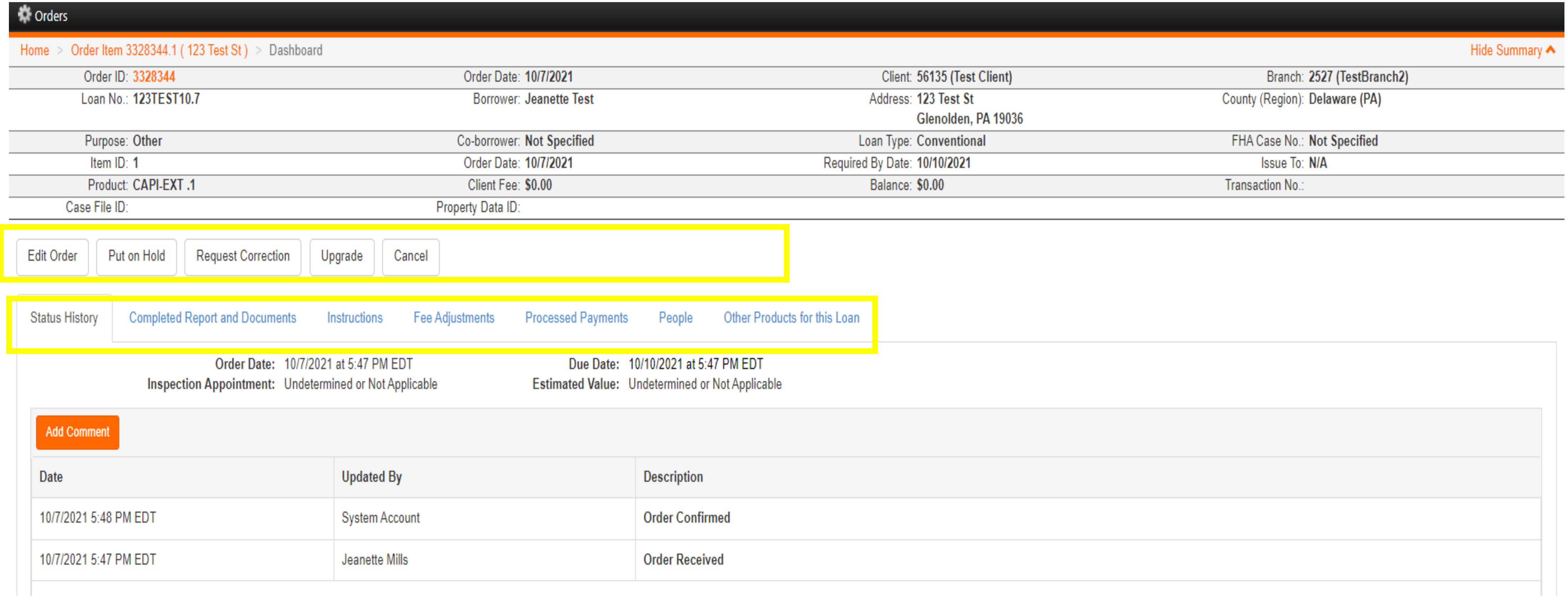
Step 9: Enter additional order contacts if applicable

If no additional contacts are needed, order communication will come to you

Step 10: Review order information and Place this Order



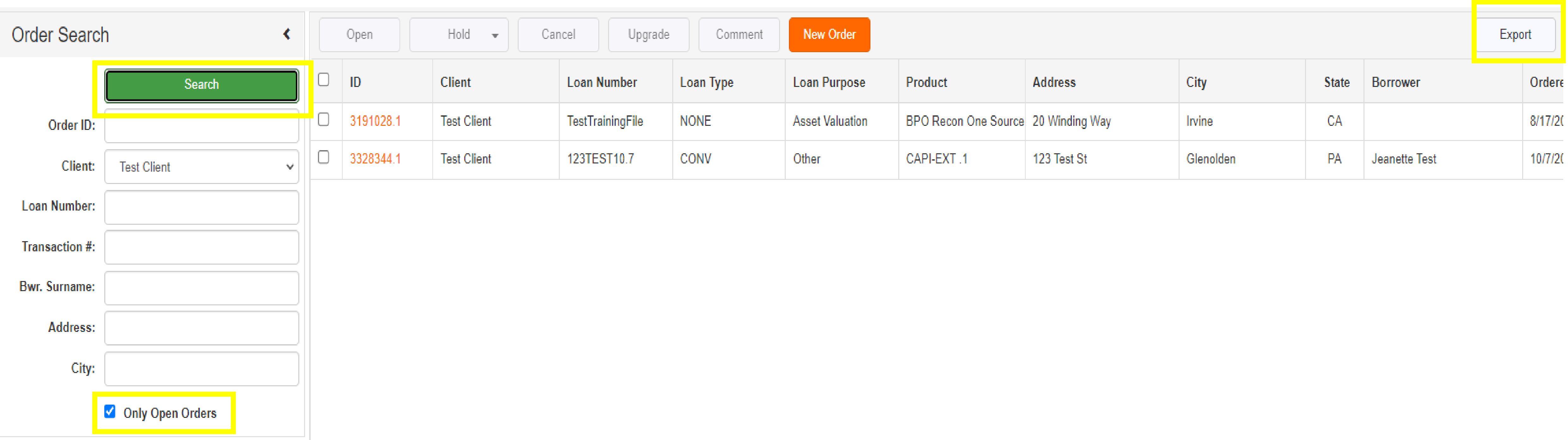
Step 11: **Once the order has been placed, the order info will be displayed on your dashboard. Use the tabs to view completed reports, upload additional documents and provide order specific instructions.**



Order Management

Step 1 : Reviewing your open order pipeline.

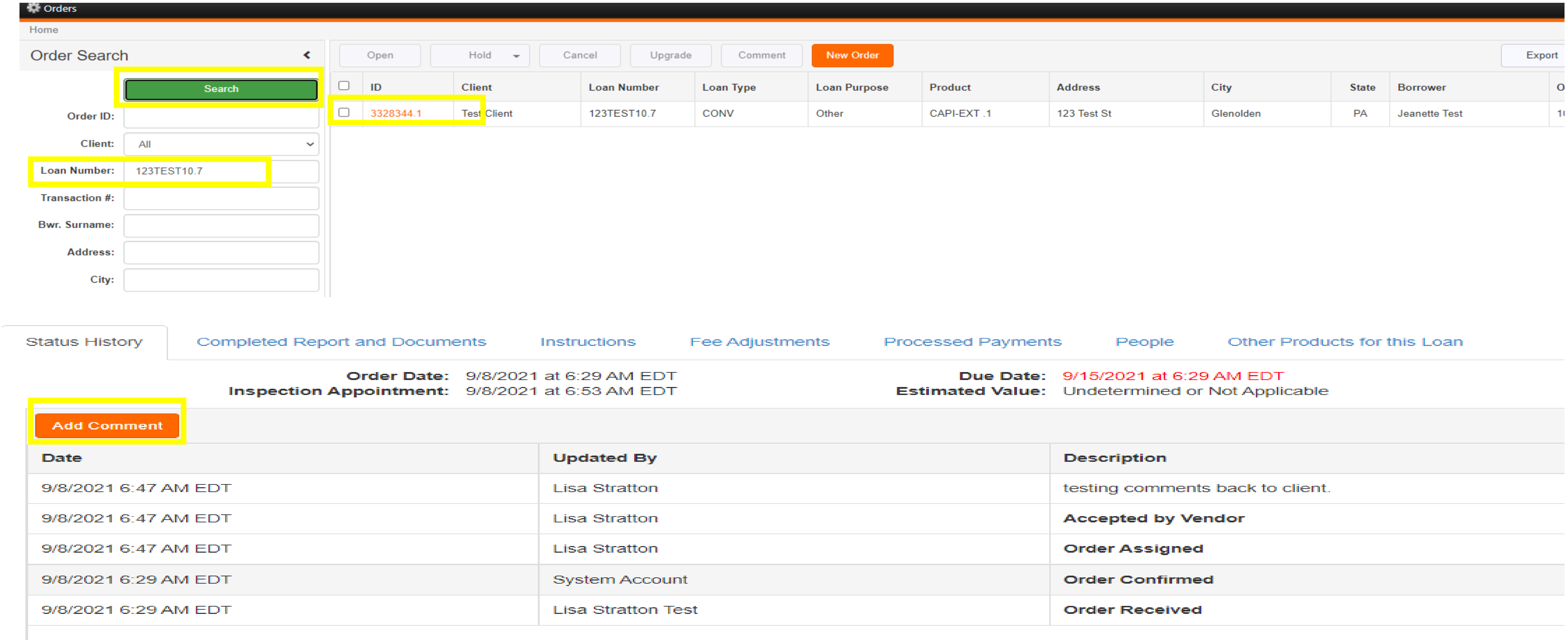
If you want to view all of you open orders, leave all fields on the left blank. Be sure the *Only Open Orders* box is checked and click *Search*. All open orders will display on the right. From here, you can access each order to review the status. You can also export your pipeline to excel by clicking the Export button in the upper right side of your screen.



Step 2: Checking the status of an existing order.

You can check the status at any point during the order life cycle. Enter any data point on the left (Order ID, Loan number, address etc.) and click *Search*. The order will display on the right. To enter the order, click the ID number to view the status history and other key components.

You can also Add a Comment to an order. Any comment added will immediately notify the CA team.



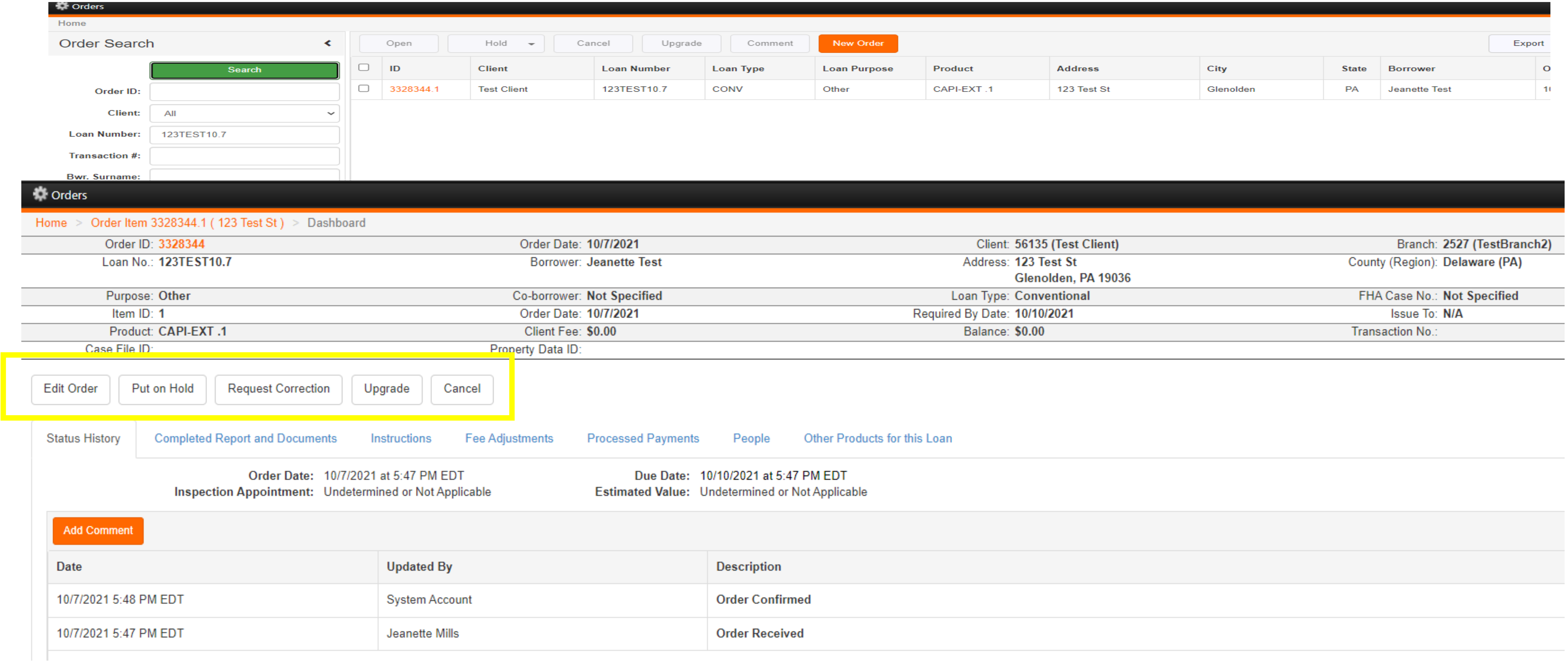
Step 3: Cancel, Put on Hold and Messaging to CA

Edit Order – edit address, contact info etc.

Put on Hold – immediately notifies CA team and order is placed on hold

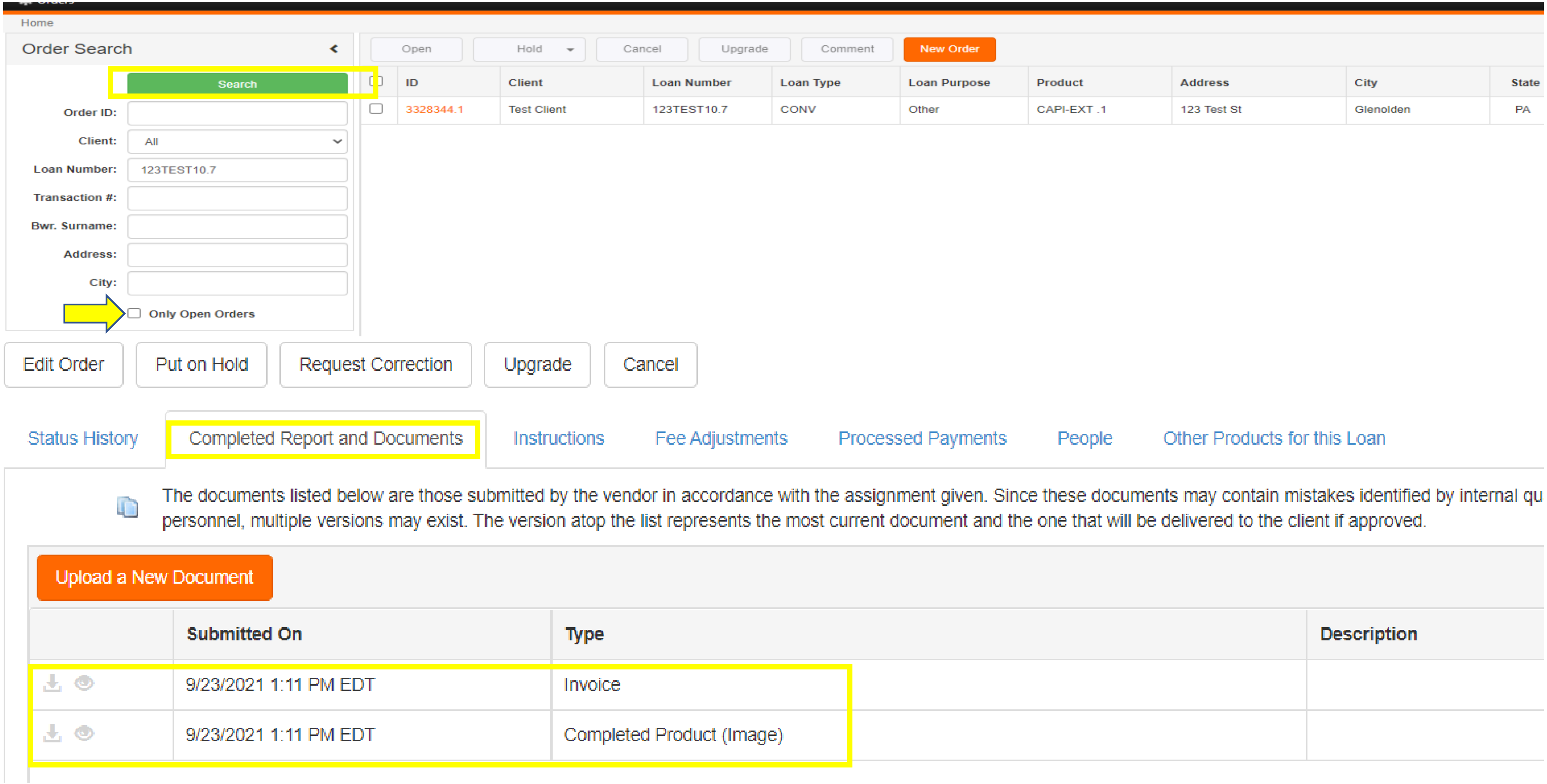
Request Correction – only available post delivery (revisions, ROV etc.)

Cancel - immediately notifies CA team you wish to cancel



Step 4: Viewing Completed Orders

Enter your order identifier. Be sure to uncheck the Only Open Orders box. Enter the order and click on the Completed Reports and Documents tab. View/download any document in the list.



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Thank you!

If you need any additional assistance, please call or email:

Client Services

clientservices@ca-usa.com

888.815.5618 option 2