

DUS Inspect Training

January 2022



Welcome to DUS Inspect training

Join one or more of these sessions to learn about system functionality, navigation and best practices

- January 18– DUS Inspect Overview
- January 19 – DUS Inspect Overview
- January 31 – Office Hours



Reminders

- **Recording in Progress:** We are recording this session to support training efforts.
- **Lines are muted:** Given the volume of attendees on this call, we have muted the lines.
- **Chat is being monitored:** We are monitoring messages, questions, and comments. Feel free to use this during the session to communicate with the session presenters.



Agenda

- DUS Inspect Overview
- User Roles and Functions
- DUS Inspect Demo
- Resources
- Questions

Presenters

- Mark Driscoll
- Terron Quarterman
- Manjuleeka (Manju) Mehta
- Mudasser (Mir) Khan



DUS Inspect Overview



What is DUS Inspect?

- A mobile inspection app (and complimentary web-based interface) to improve the efficiency of the property inspection process with data integration, process flows and actionable analytics.

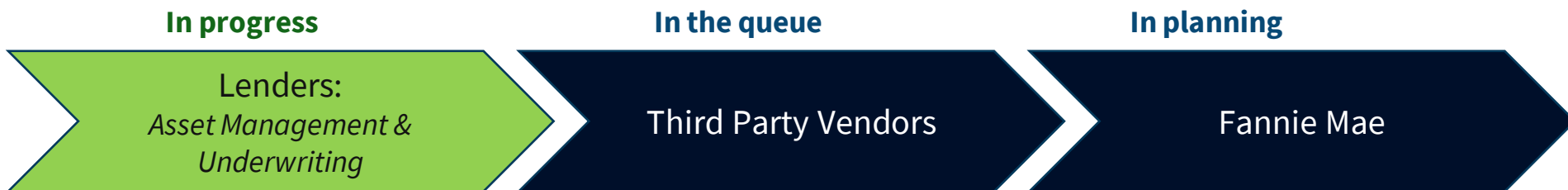


Where are we today?

- Application Rollout
 - Phased release: Asset Management and Underwriting
 - Demos and trainings
- Prioritizing additional features and functions



Road Map



User Roles and Functions



Inspector Role

- View inspections
- Perform inspections
- Edit inspections
- Deliver inspection reports



Reviewer Role

- View inspections
- Perform inspections
- Edit inspections
- Deliver inspection reports
- Assign inspections
- Review and certify inspections

Standard Workflow



Color Key: Reviewer Role
Inspector Role



Desktop – Home / Landing Page

Inspection App Search... Demo LenderReviewer1

Home Properties Inspections

Dashboard **Property Inspections** Refresh

As of Nov 29, 2021, 10:01 AM - Viewing as Demo LenderReviewer1

Unassigned Inspections **364** View Report (Unassigned)

Inspections In Progress **130** View Report (Inspections In Progress)

Inspections Under Lender Review **24** View Report (Inspections Under Lender Review)

All Chatter

Inspections All Inspections New Certify Inspection Assign Inspector Return to Inspector

50+ items • Sorted by MSA • Filtered by All Inspections • Updated 3 minutes ago

	Property Name	Lender Loan ...	MSA ↓	Submission Due Date	Previous Insp...	Previous Insp...	Units	FM Risk Rating	Status	Inspector
1	Demo Property 1	123450	WASHINGTON-A...	7/1/2022	2	6/3/2021	204	Pass-4	Assigned...	Demo Lend...
2	Demo Property 2	123451	TUCSON, AZ ME...	7/1/2022	2	1/19/2021	196	Pass-4	Inspectio...	Demo Lend...
3	Demo Property 3	123452	TAMPA-ST. PETE...	7/1/2022	2	4/8/2021	82	Pass-4	Assigned...	Demo Lend...
4	Demo Property 4	123453	TALLAHASSEE, ...	7/1/2022	2	5/20/2021	120	Pass-4	Unassigned	
5	Demo Property 5	123454	STATE COLLEGE...	7/1/2022	2	7/18/2019	87	Pass-4	Unassigned	
6	Demo Property 6	123455	ST. LOUIS, MO-I...	7/1/2022	2	6/16/2021	608	Pass-4	Unassigned	

Home / Landing Page

See loans associated to the Seller Servicer Numbers

1. Lender Reviewers will see the Dashboard
2. Lender Reviewers and Lender Inspectors will see the List View



Desktop – Home / Landing Page

Preset Inspection Lists

Select preset Inspection Lists from the Inspections drop down

- The list includes:
 - All Inspections
 - Assigned to Vendor
 - Assigned-Lender Inspector
 - Certified
 - Inspections In Progress
 - Lender Review
 - Ready to Submit
 - Recently Viewed
 - See My Inspections
 - Unassigned

The screenshot shows a web application interface with a dark blue header. The main navigation bar includes 'Home', 'Properties', and 'Inspections'. Below this, there are tabs for 'All' and 'Chatter'. A red box highlights the 'Inspections' menu item, which has a dropdown arrow. The dropdown menu is open, showing a list of preset inspection lists: 'All Inspections' (checked), 'Assigned to Lender Inspector', 'Assigned to Vendor', 'Certified', 'Inspection In Progress', 'Lender Review', 'Ready to Submit', 'Recently Viewed', 'See My Inspections', and 'Unassigned'. Below the menu, there is a search bar and a table of inspection records. The table has columns for 'Property', 'Previous Insp...', 'Units', 'FM Risk Rat...', 'Status', and 'Inspector'. The table contains 15 rows of data, each representing a different property inspection.

Property	Previous Insp...	Units	FM Risk Rat...	Status	Inspector			
2	6/3/2021	204	Pass-4	Assigned-...	Demo Lend...			
2	1/19/2021	196	Pass-4	Inspection...	Demo Lend...			
2	4/8/2021	82	Pass-4	Assigned-...	Demo Lend...			
2	5/20/2021	120	Pass-4	Unassigned				
2	7/18/2019	87	Pass-4	Unassigned				
2	6/16/2021	608	Pass-4	Unassigned				
512			Pass-3	Unassigned				
2	5/27/2021	239	Pass-3	Unassigned				
Demo Property 9	123458	SANTA ROSA-PE...	8/1/2022	150	Pass-3	Unassigned		
Demo Property 10	123459	SAN LUIS OBISP...	8/1/2022	2	9/12/2019	422	Pass-4	Unassigned
Demo Property 11	123460	SAN JOSE-SUN...	8/1/2022	2	6/2/2021	430	Pass-4	Unassigned
Demo Property 12	123461	SAN JOSE-SUN...	8/1/2022	2	6/2/2021	504	Pass-4	Unassigned
Demo Property 13	123462	SAN JOSE-SUN...	8/1/2022	2	2/4/2021	170	Pass-4	Unassigned
Demo Property 14	123463	SAN FRANCISC...	8/1/2022	2	4/27/2021	54	Sub-Standard	Unassigned
Demo Property 15	123464	SAN FRANCISC...	8/1/2022	2	5/10/2021	125	Pass-3	Unassigned



Desktop – Home / Landing Page

Home Properties Inspections

All Chatter

Inspections All Inspections

50+ items • Sorted by MSA • Filtered by All inspections • Updated a few seconds ago

Search this list...

	Property Name	Lender Loan ...	MSA	Submission Due Date	Previous Insp...	Previous Insp...	Units	FM Risk Rat...	Status	Inspector
1	<input checked="" type="checkbox"/> Demo Property 1	123450	WASHINGTON-A...	7/1/2022	2	6/3/2021	204	Pass-4	Assigned-...	Demo Lend...
2	<input type="checkbox"/> Demo Property 2	123451						Pass-4	Inspection...	Demo Lend...
3	<input type="checkbox"/> Demo Property 3	123452						Pass-4	Assigned-...	Demo Lend...
4	<input checked="" type="checkbox"/> Demo Property 4	123453						Pass-4	Unassigned	
5	<input type="checkbox"/> Demo Property 5	123454						Pass-4	Unassigned	
6	<input checked="" type="checkbox"/> Demo Property 6	123455						Pass-4	Unassigned	
7	<input type="checkbox"/> Demo Property 7	123456						Pass-3	Unassigned	
8	<input type="checkbox"/> Demo Property 8	123457						Pass-3	Unassigned	
9	<input checked="" type="checkbox"/> Demo Property 9	123458						Pass-3	Unassigned	
10	<input checked="" type="checkbox"/> Demo Property 10	123459	SAN LUIS OBISP...	8/1/2022	2	9/12/2019	422	Pass-4	Unassigned	
11	<input type="checkbox"/> Demo Property 11	123460	SAN JOSE-SUN...	8/1/2022	2	6/2/2021	430	Pass-4	Unassigned	
12	<input type="checkbox"/> Demo Property 12	123461	SAN JOSE-SUN...	8/1/2022	2	6/2/2021	504	Pass-4	Unassigned	
13	<input type="checkbox"/> Demo Property 13	123462	SAN JOSE-SUN...	8/1/2022	2	2/4/2021	170	Pass-4	Unassigned	
14	<input type="checkbox"/> Demo Property 14	123463	SAN FRANCISC...	8/1/2022	2	4/27/2021	54	Sub-Standard	Unassigned	
15	<input type="checkbox"/> Demo Property 15	123464	SAN FRANCISC...	8/1/2022	2	5/10/2021	125	Pass-3	Unassigned	

Assign Inspector

Inspector

Search Contacts...

Fields to update
No changes yet

Cancel Save

Action Buttons

Select inspection(s) and apply action buttons

1. Select an individual inspection or multiple inspections
2. Apply a workflow action

Lender Reviewer Action Buttons

+ Follow Add Property Image(s) Assign Inspector Return to Inspector

Certify Inspection

Lender Inspector Action Buttons

+ Follow Add Property Image(s) Submit for Review



Desktop – Inspection Record

The screenshot displays the 'Inspection App' interface. At the top, there is a search bar and a user profile for 'Demo LenderReviewer1'. Below this is a navigation bar with 'Home', 'Properties', and 'Inspections'. The main content area shows an inspection record for 'DUSINSP-19486'. A workflow status bar is highlighted with a red box and a blue callout '1', showing stages: Unassigned, Assigned-Lender Inspe..., Inspection in Progress (current), Ready to Submit, Lender Review, Returned to Inspector, and Certified. Below the status bar, the 'Details' tab is selected and highlighted with a red box and a blue callout '2'. It shows a table with columns: Inspection Name (DUSINSP-21097), Assigned Inspector Name (Demo LenderInspector1), Lender Loan Number (123450), and Property Name (Demo Property 1). Below the table are buttons for 'Validate to proceed', '0 Issue(s)', 'Validate Inspection', and 'Generate MBA Form'. On the left, a sidebar menu is highlighted with a red box and a blue callout '3', listing sections like 'General Info', 'Physical Condition & DM', 'Mgmt Interview', 'Multifamily', 'Fannie Mae Assmt Addendum', and 'Repairs Verification'. The right side of the sidebar lists expandable sections such as 'Subject Property', 'Servicer and Loan Information', 'Inspection Scheduling Contact Information', 'Inspector Information', 'Management Company Information/On-Site Contact', 'Servicer and Inspector Comments', 'Property Profile and Occupancy', 'O&M', and 'Neighborhood and Site Comparison Data'.

Workflow Chevrons / Details Tab

See all the details from the property inspection including current workflow status

1. See the workflow status and next steps of an Inspection Record
2. The Details tab houses most of the inspection details for a specific inspection record
3. View, edit, and review inspection details from this menu and corresponding subsections



Desktop – Inspection Record

Details Records Chatter

Inspection Name	Assigned Inspector Name	Lender Loan Number	Property Name
DUSINSP-21097	Demo LenderInspector1	123450	Demo Property 1

Validate to proceed 0 Issue(s) [▲ Validate Inspection](#) [↓ Generate MBA Form](#)

General Info

Physical Condition & DM

[Mgmt Interview](#)

Multifamily

Fannie Mae Assmt Addendum

Repairs Verification

Expand All | Collapse All


2


1


3


Cancel Save


Neighborhood and Rental Market


How Does Property Compare? *i* 


Market Vacancy Percent *i* 


Average Rent Per Unit Amount *i* 


Vacancy Rate Comparison *i* 


Market Variance Reason Description *i* 


Major Employer Commercial Retail Change *i* 

Major Employer Commercial Reason Descrip 

Last Rental Increase Amount 

Last Rental Increase Date 

Management Employee Admin Count 

Management Employee Maint Count 

> Utilities / Tenant Profile

> Property Events

Inspection Data

Select any pencil icon to open the edit view

1. Select a specific menu and subsection then select the Expand All hyperlink to view the section details
2. Select any pencil icon to open the edit view
3. Select the Save button to save or Cancel button to exit without saving while in the edit view



Desktop – Inspection Record

Property Image(s)

Add images to an Inspection Record

1. Select Add Property Image(s) to upload photos from your photo library
2. While adding an image, simultaneously add that item to the Deferred Maintenance or Repair Verification list by selecting the Add to DM or Add to RV buttons
3. The Files section on the Records tab houses the uploaded photos, videos, and other files



Desktop – Inspection Record

The screenshot shows the 'Inspection App' interface for inspection record DUSINSP-19486. The 'Records' tab is highlighted in red. The interface includes a navigation bar with 'Home', 'Properties', and 'Inspections'. Below the navigation bar, there are buttons for '+ Follow', 'Add Property Image(s)', 'Assign Inspector', 'Return to Inspector', and 'Certify Inspection'. A progress bar shows the current status as 'Inspection in Progress'. The main content area is divided into sections: 'Files (1)' with a file named 'apartment-9-11-17', 'Operations & Management Plans (2)' with a table of plans, 'Capital Expenditures (1)' with a table of expenditures, and 'Unit Mix (2)'. The 'Records' tab is highlighted in red.

Operations & Management Plan ID	List of O&M Plans Required ↑	Management Aware of Plan?	Plan Available?
1	OMP-0060	Asbestos	Yes
2	OMP-0061	Moisture/Mold	Yes

Capital Expenditure ID	Capital Expenditure	Identified Cost	Status
1	CE-0060	testing	\$100.00

Records Tab

Houses photos, videos, deferred maintenance and life safety items, unit mix, units inspected, operation & management plans, repair verification

- View, edit, and add:
 - Files
 - Operation & Management Plans
 - Capital Expenditures
 - Unit Mix
 - Units Inspected
 - Deferred Maintenance
 - Life Safety Items
 - Repair Verifications



Desktop – Inspection Record

The screenshot displays the 'Inspection App' interface. At the top, there is a search bar and a user profile for 'Demo LenderReviewer1'. Below this is a navigation bar with 'Home', 'Properties', and 'Inspections' tabs. The main content area shows the inspection record 'DUSINSP-19486' with a progress bar indicating the current status: 'Inspection in Progress'. A 'Chatter' tab is highlighted in red. Below the progress bar, there is a 'Post' section with a text input field and a 'Share' button. The 'Sort by' dropdown is set to 'Most Recent Activity'. A search bar for the feed is also present. A post from 'Demo LenderInspector1 (Customer)' is visible, dated '12h ago', with the text 'HI @Demo LenderReviewer1 (Customer) - my inspection is complete'. Below the post are 'Like' and 'Comment' buttons, and a 'Write a comment...' input field.

Chatter Tab

Communicate with users in-app and provide updates to a specific record



Desktop – Inspection Record

Details Records Chatter

Inspection Name	Assigned Inspector Name	Lender Loan Number	Property Name
DUSINSP-21097	Demo LenderInspector1	123450	Demo Property 1

Validate to proceed 0 Issue(s) **1** [Validate Inspection](#) [Generate MBA Form](#)

Details Records Chatter

Inspection Name	Assigned Inspector Name	Lender Loan Number	Property Name
DUSINSP-21097	Demo LenderInspector1	123450	Demo Property 1

Fix errors to proceed **44 error(s)** [Validate Inspection](#) [Generate MBA Form](#)

2

Errors

- General Info**
- REQUIRED Property Profile and Occupancy: Number of Floors [Fix →](#)
- General Info**
- REQUIRED Management Company Information/On-Site Contact: Management Onsite Contact LastName [Fix →](#)
- Physical Condition & DM**

[Expand All](#) | [Collapse All](#)

Details Records Chatter

Inspection Name	Assigned Inspector Name	Lender Loan Number	Property Name
DUSINSP-21097	Demo LenderInspector1	123450	Demo Property 1

Validate to proceed 0 Issue(s) [Validate Inspection](#) **3** [Generate MBA Form](#)

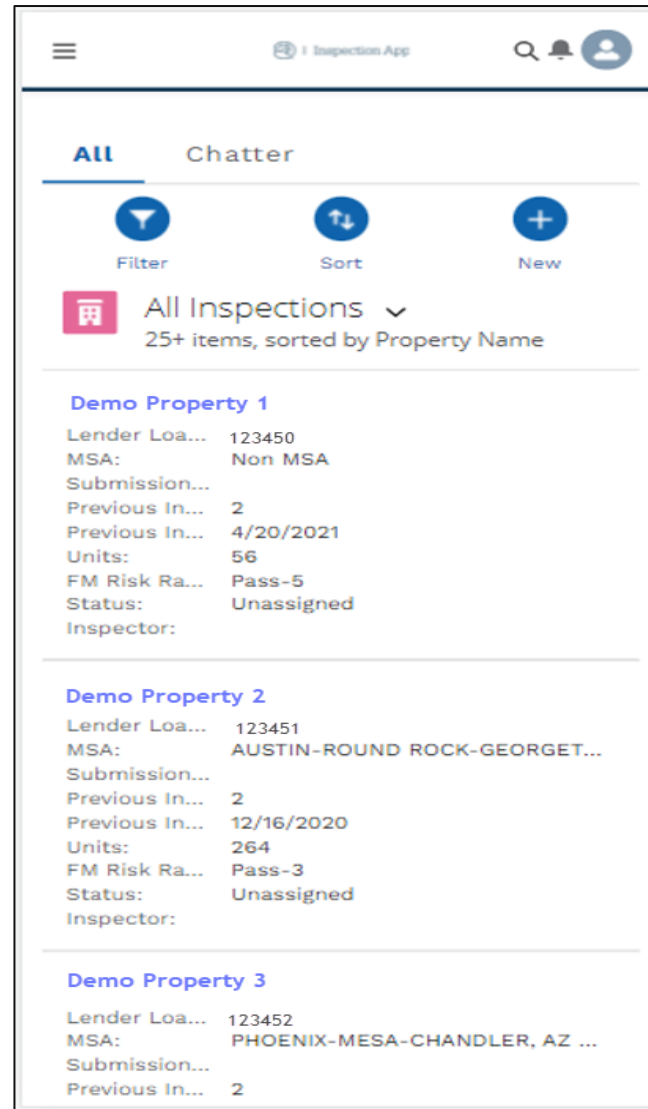
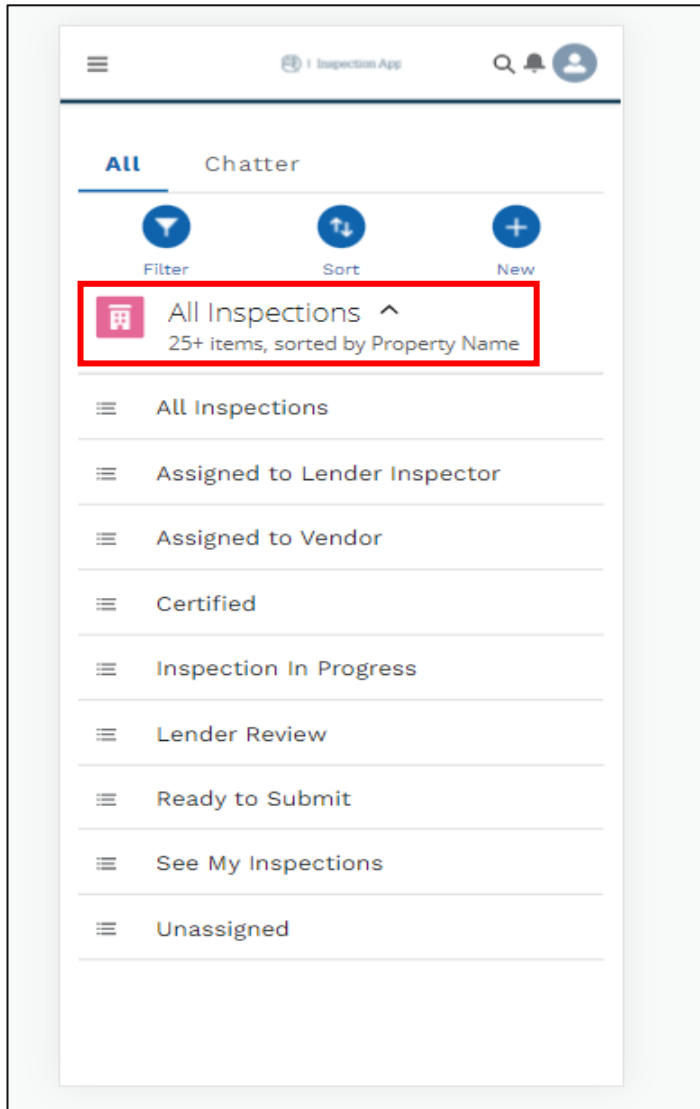
MBA Form

Generate and export an MBA form into excel

1. Validate an Inspection Form on the Details tab
2. Fix errors to ensure MAMP and MBA Form requirements are met prior to submitting an Inspection Record for review, certification and generating an MBA Form
3. Produce an MBA Form in an Excel format with all the details entered in DUS Inspect



Mobile – Home / Landing Page



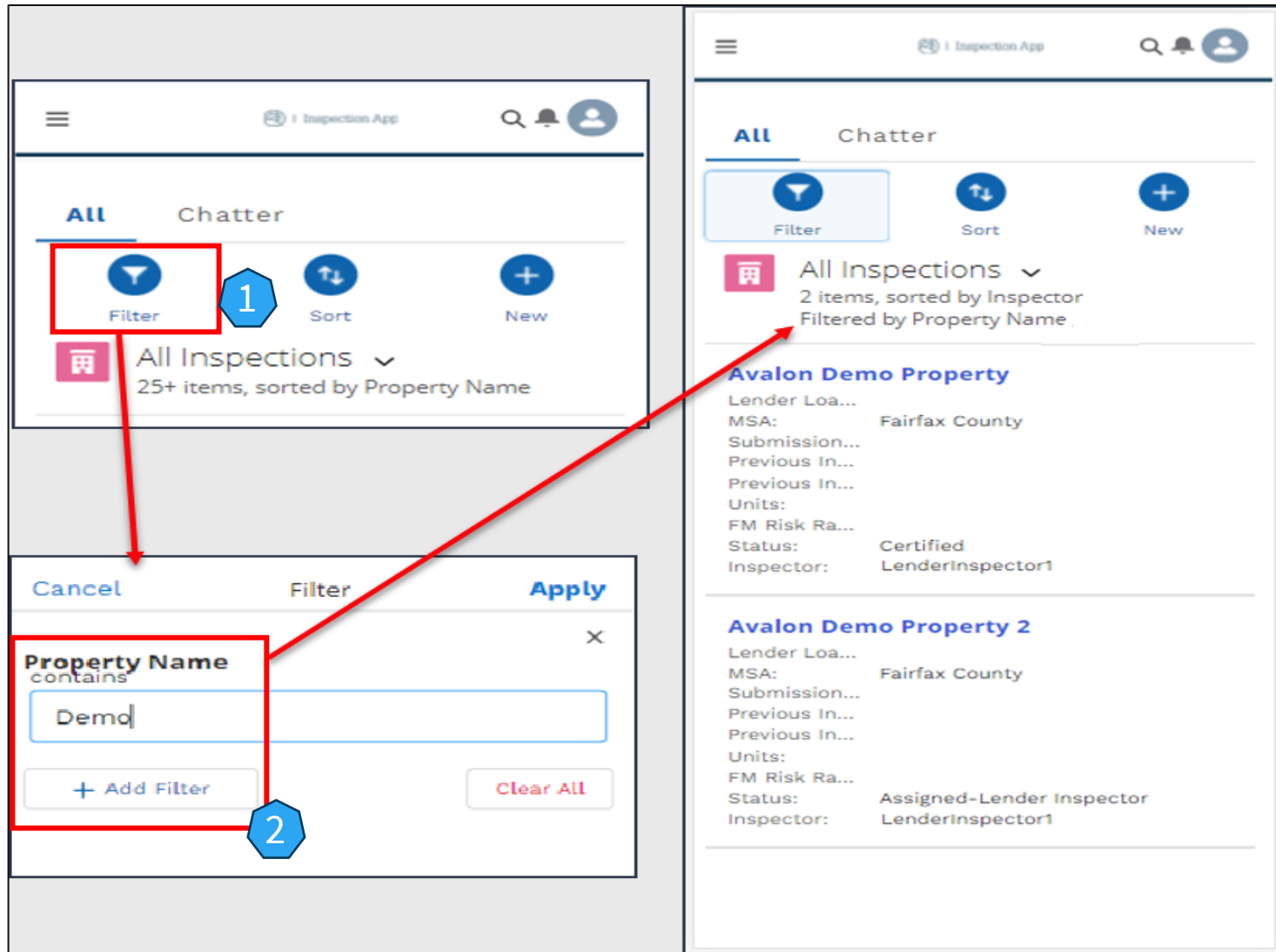
Preset Inspection Lists

Select preset Inspection Lists from the Inspections drop down

- The list includes:
 - All Inspections
 - Assigned-Lender Inspector
 - Assigned to Vendor
 - Certified
 - Inspections In Progress
 - Lender Review
 - Ready to Submit
 - See My Inspections
 - Unassigned



Mobile – Home / Landing Page



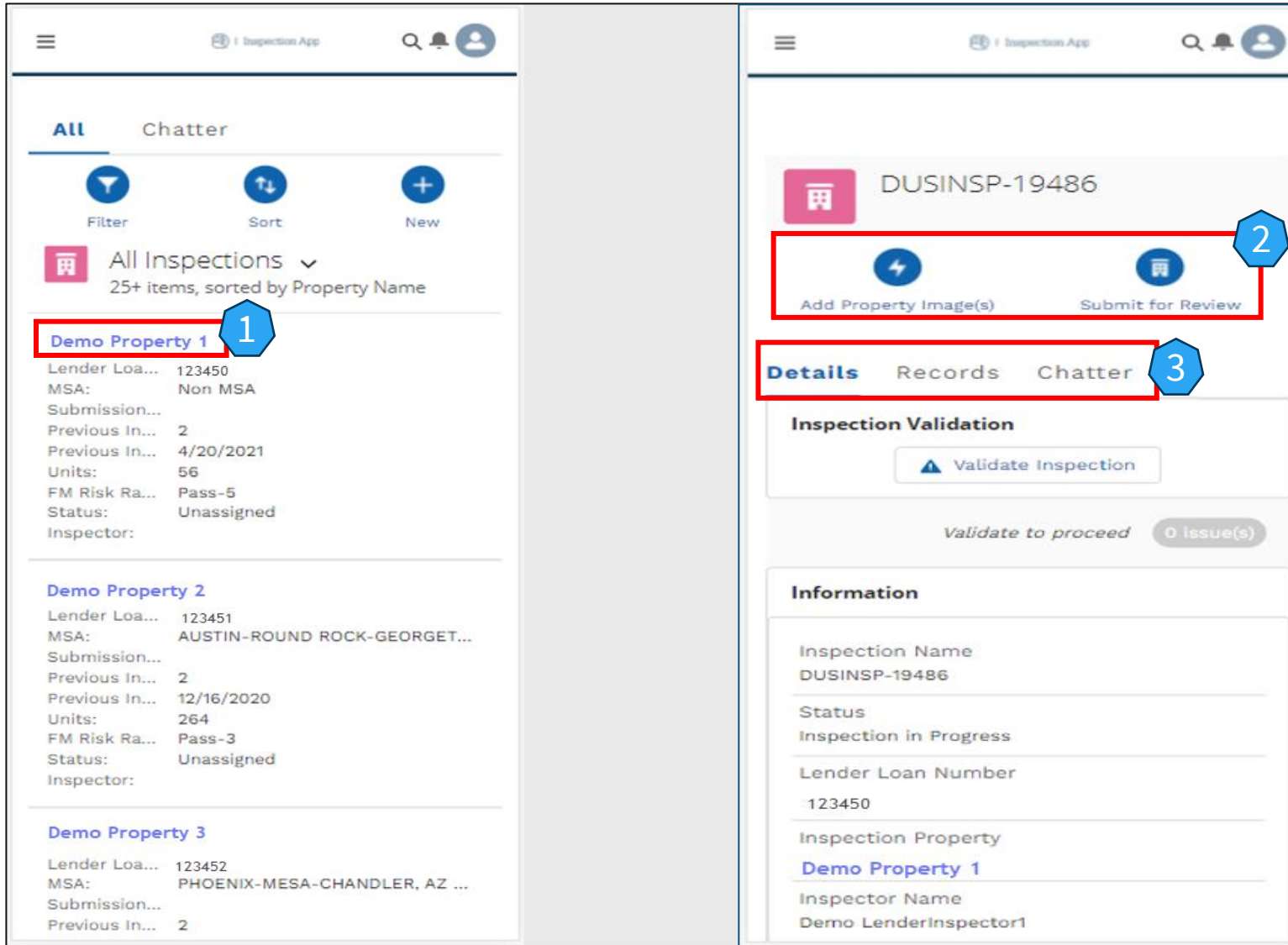
List View Filters

See a customized List View related to specific loan numbers, MSAs, etc.

1. Apply filters to navigate List View
2. Apply filters on Property Name, Lender Loan Number, MSA, FM Risk Rating, Status, and more.



Mobile – Inspection Record



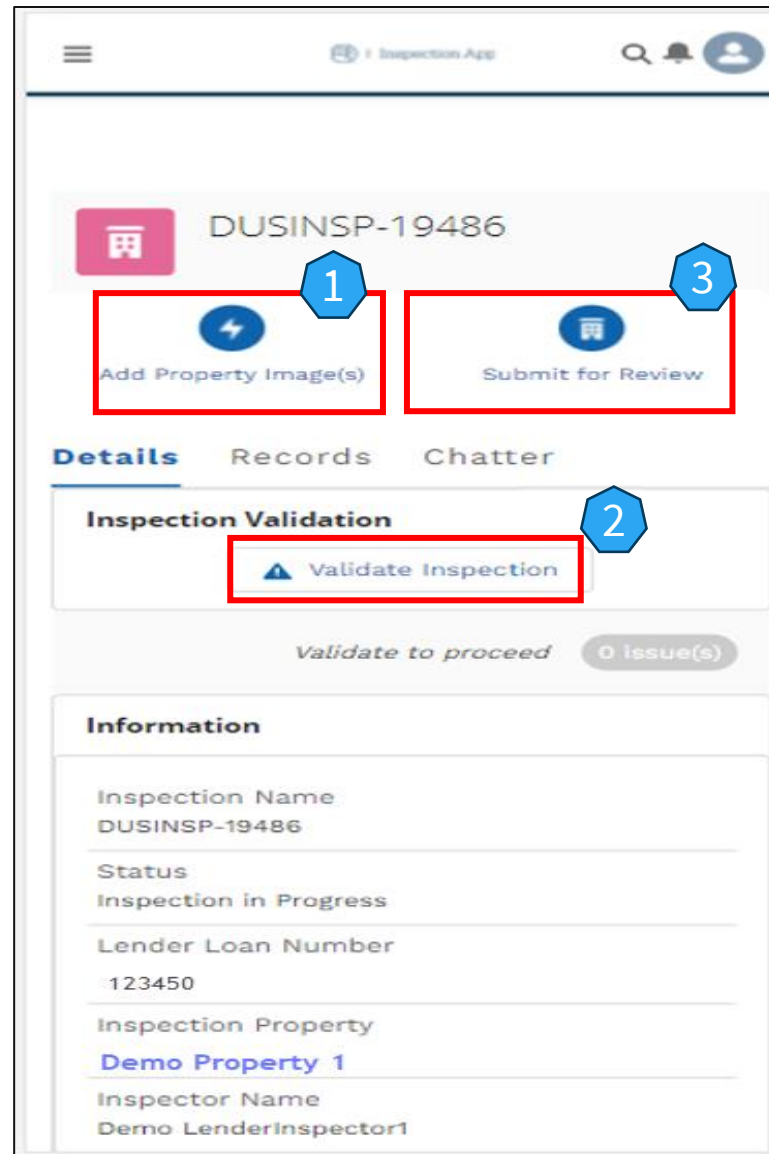
Action Buttons and Tabs

See all the details from the property inspection

1. Select the Property Name hyperlink to navigate to the Inspection Record
2. Inspection Records include Action Buttons:
 - Add Property Image(s)
 - Submit for Review
 - Validate Inspection
3. Inspection Records include the Details, Records, and Chatter tabs



Mobile – Inspection Record



Action buttons

Apply action buttons to perform certain functions

1. Select Add Property Image(s) to take photos and/or upload photos from your photo library
2. Select Validate Inspection to ensure MAMP and MBA Form requirements are met prior to submitting an Inspection Record for review and certification
3. Select Submit for Review to add the Inspection Record to the Reviewer's queue for certification



Mobile – Inspection Record

The screenshot displays the mobile interface for adding property images to an inspection record. At the top, a green success message states: "Success File was uploaded successfully. Please assign a category in the list below." Below this, there is a button labeled "Upload Files" and a "Save" button. The main section shows a thumbnail of an apartment building with the following details: File Name: apartment-9-11-17.jpeg, RV: None, and DM: None. A red box highlights the "Select a Category" dropdown menu, with a blue circle containing the number "1" next to it. Below the dropdown is a "Comments" text area. At the bottom of this section, there are two buttons: "Add to DM" and "Add to RV", with a blue circle containing the number "2" next to the "Add to RV" button. A red arrow points from the "Add to DM" button to the "Add Deferred Maintenance" form on the right. Another red arrow points from the "Add to RV" button to the "Add Repairs Verification" form on the right. The "Add Deferred Maintenance" form includes a "Back to Property Images Upload" link, a title "Add Deferred Maintenance", an "Item Name And Description" text area, a "Rating" dropdown menu set to "Major", a "Life Safety" dropdown menu set to "Yes", and a "Cost" text area. The "Add Repairs Verification" form includes a "Back to Property Images Upload" link, a title "Add Repairs Verification", an "Inspector Comments" text area, and a "Repair Status" dropdown menu set to "--None--". Both forms have a "Save" button at the bottom.

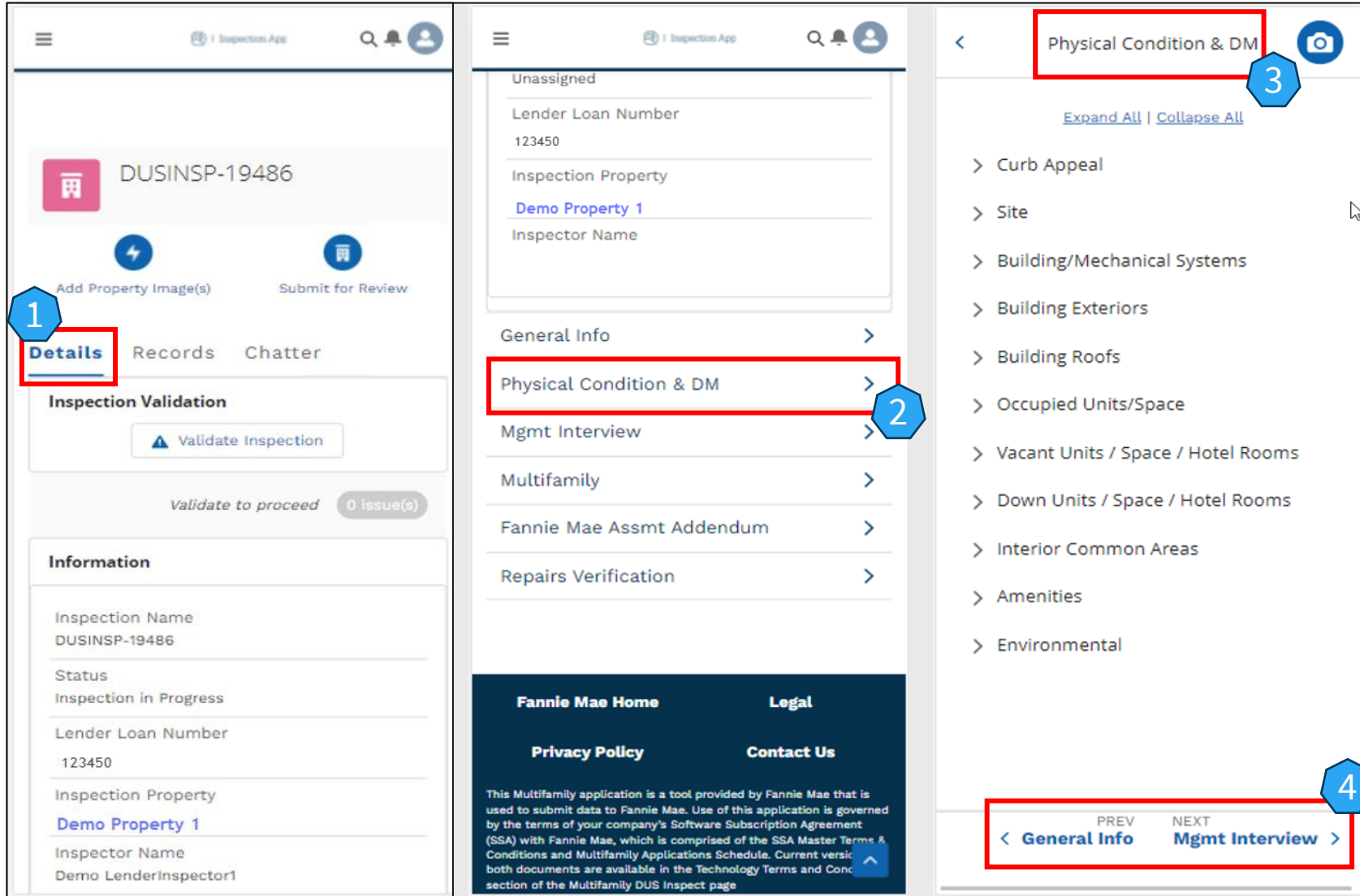
Property Image(s)

Add live photos and/or upload images to an Inspection Record from photo library

1. Select an image category and add comments
2. Simultaneously, add an item to the Deferred Maintenance or Repair Verification list by selecting the Add to DM or Add to RV buttons



Mobile – Inspection Record



Details Tab

See all the details from the property inspection

1. The Details tab houses most of the inspection details for a specific inspection record
2. View inspection details from this menu
3. View, edit, and review inspection details from the corresponding subsections
4. Select the PREV or NEXT hyperlinks at the bottom of the screen to navigate between the menu sections



Mobile – Inspection Record

The image displays two screenshots of a mobile application interface for an inspection record. The left screenshot shows the 'General Info' screen. At the top, there is a back arrow, the title 'General Info', and a camera icon. Below the title, there are two links: 'Expand All' (highlighted with a red box and labeled '1') and 'Collapse All'. A section titled 'Subject Property' is expanded, showing fields for Property Name (Demo Property 1), Property Address (123 Main Street), Property City/State/Zip (TUCSON, AZ 85743), Property Country (with a pencil icon highlighted by a red box and labeled '2'), MSA Code, MSA (TUCSON, AZ METROPOLITAN STATISTICAL AREA), Overall Property Rating (2), Rating Scale, Inspection Date / Time, and Primary Property Type. At the bottom, there is a 'NEXT' button and a button labeled 'Physical Condition & DM' with a right arrow. The right screenshot shows the 'Physical Condition & DM' screen. It has a back arrow, the title 'Physical Condition & DM', and a camera icon. Below the title, there are two links: 'Expand All' (highlighted with a blue box) and 'Collapse All'. A section titled 'Curb Appeal' is expanded, showing fields for Curb Appeal Overall Rating (dropdown menu), Curb Appeal Trend (dropdown menu), and Curb Appeal Inspector Comments (text area). Below this is a section titled 'Site' with fields for Site Overall Rating (dropdown menu), Site Trend (dropdown menu), and Site Inspector Comments (text area). At the bottom, there is a section titled 'Building/Mechanical Systems' with a field for Mechanical Systems Overall Rating (dropdown menu). At the very bottom, there are two buttons: 'Cancel' and 'Save' (both highlighted with a red box and labeled '3').

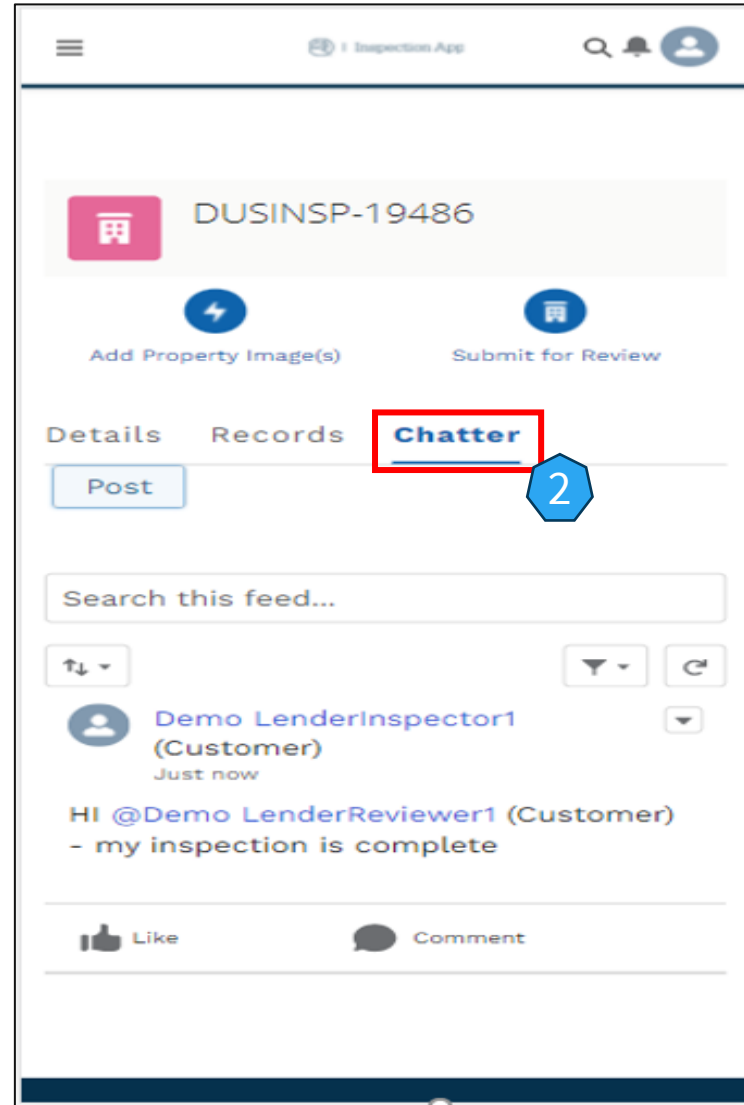
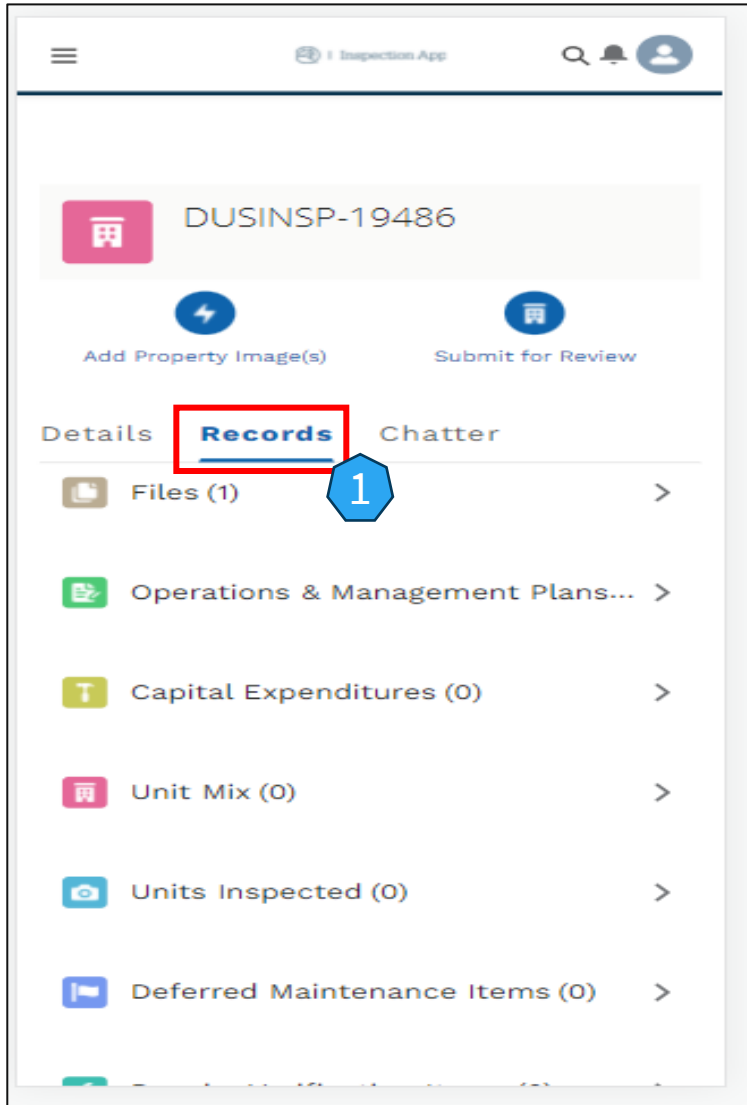
Inspection Data

Select any pencil icon to open the edit view

1. Select a specific menu and subsection then select the Expand All hyperlink to view the section details
2. Select any pencil icon to open the edit view
3. Select the Save button to save or Cancel button to exit without saving while in the edit view



Mobile – Inspection Record



Records and Chatter Tabs

1. View, edit, and add:
 - Files
 - Operation & Management Plans
 - Capital Expenditures
 - Unit Mix
 - Units Inspected
 - Deferred Maintenance
 - Life Safety Items
 - Repair Verifications
2. Communicate with users in-app and provide updates to a specific record



Resources

DUS Inspect Website

<https://multifamily.fanniemae.com/applications-technology/dus-inspect>

- Demo Videos
- Job Aids
- User Guide
- FAQs

For additional help, contact dus_inspect@fanniemae.com



Questions?

