How To
Submit Conditions for Review

COMMUNITY SAVINGS

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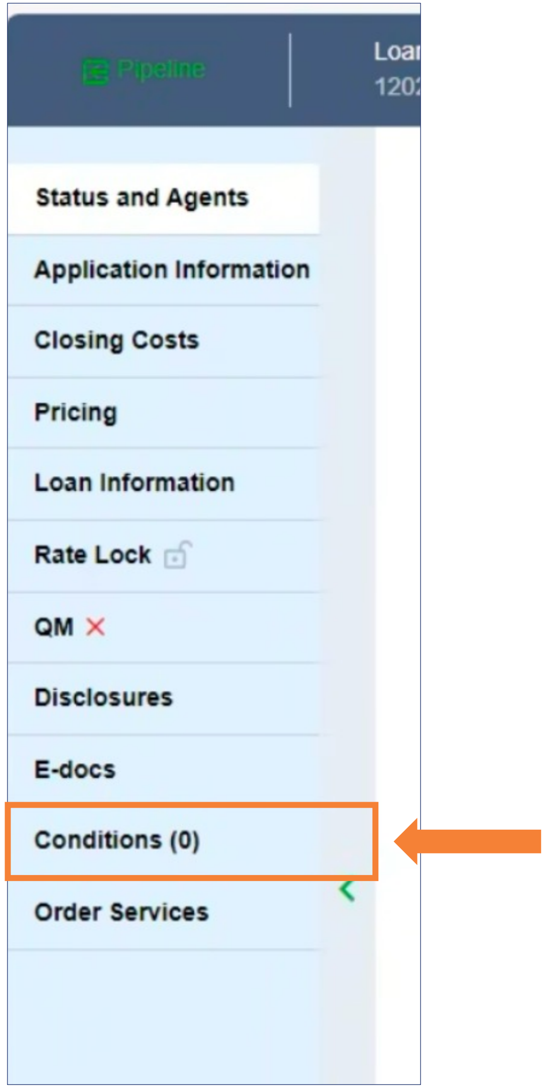
Conditions

When you have documents ready to satisfy an outstanding condition you can submit them for “Condition Review”. Select “Conditions” from the left side of your screen and a new window will open with the outstanding conditions.

Please note: The number in the ( ) after Conditions is only the number of conditions assigned to your role, not the number of remaining conditions for Clear To Close. It is best to ignore this number.



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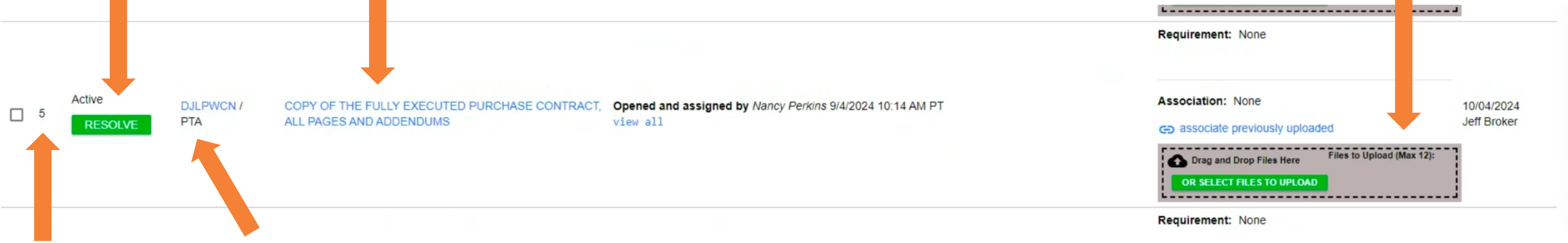
Upload a Document

To upload a document, find the desired condition in the conditions list and you can then drag and drop from your computer or select to upload a file and find it in your documents.

You do not need to do anything with "resolve"

This is the Condition and the details of what is needed. Any updates to the condition will also be listed here.

This is where you attach the document.



This is the condition number.

This is the condition category.

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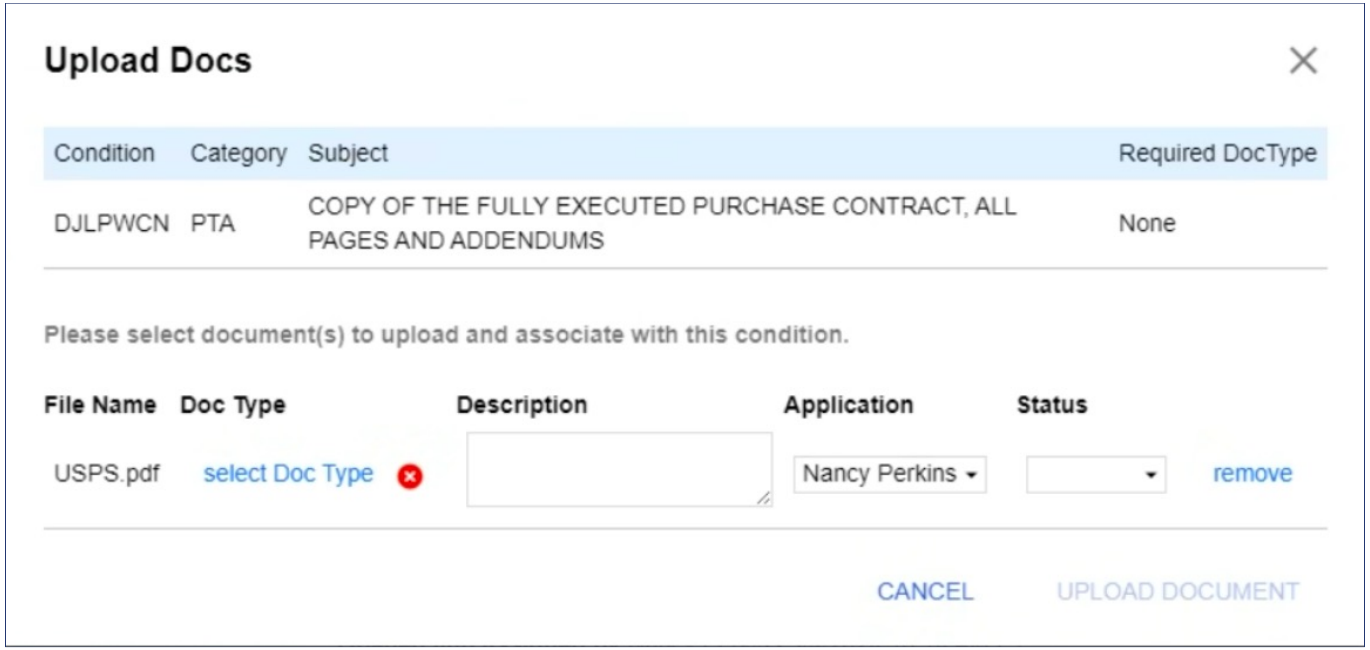
Document Description

You will then be prompted to this screen. Under "Description" you can enter a short note on what the document is. Then click on select "Doc Type".



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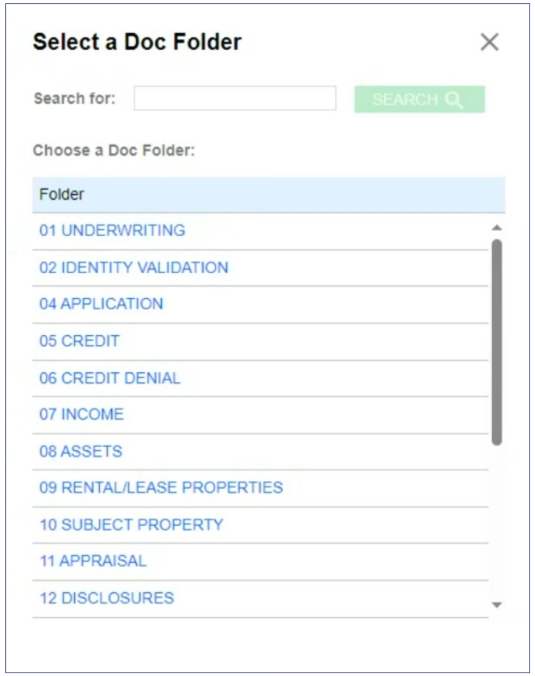
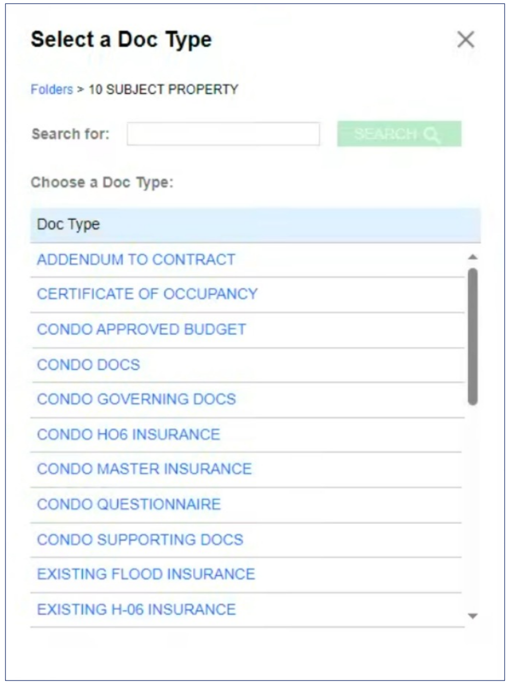
Doc Folder/Doc Type

Once you upload a document a new window will pop up and you will select a Doc Folder and then a Doc Type from the list. It does not really matter what you select here.





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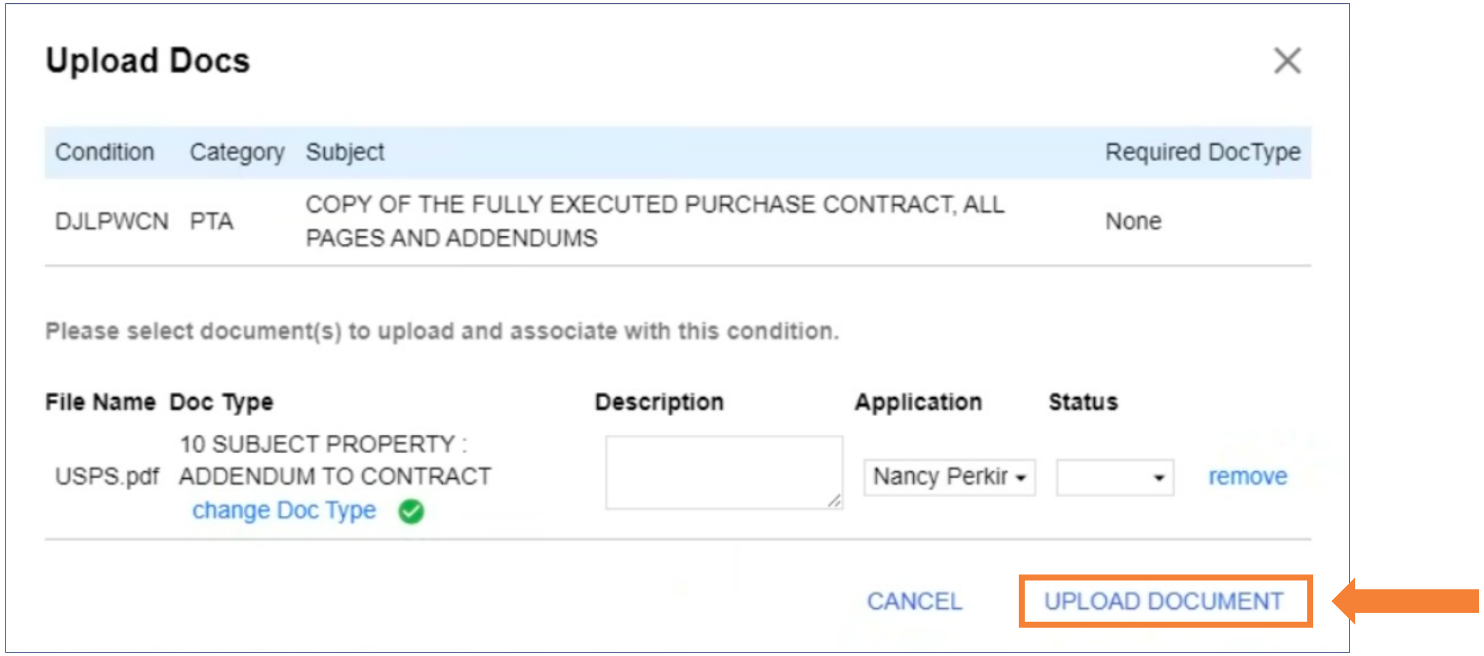
Upload Document

Next you will select “Upload Document” in the bottom right corner. This will finish uploading and attaching the document to the condition.



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Uploading Conditions

You will see the document has been linked to that condition by looking at the Document under “Association”. You can upload up to 12 documents to one condition at a time if needed.

Repeat this process for all conditions you are ready to submit for review.

The “RESOLVE” on the left side you do not have to worry about, this does not affect anything.

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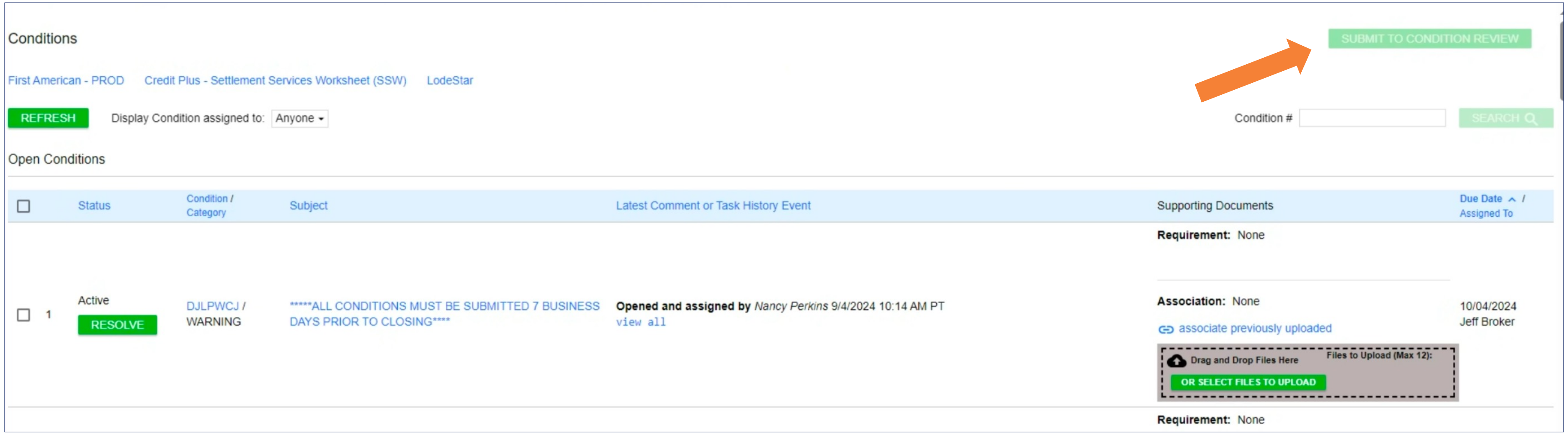
Submit to Condition Review

Once you have uploaded all the documents that are ready to be reviewed, the next step is to submit the loan back to "Condition Review". You will do this simply to clicking the "Submit To Condition Review" in the upper right-hand corner.

If this button is greyed out it means either this loan has not been conditionally approved yet or it's already in condition review status and currently with the junior underwriter.



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Contact us to learn more!

The Jr Underwriter assigned to the loan will receive notification that you have moved this file to "Condition Review". After looking at all conditions the Jr Underwriter will reach back out with an updated approval certificate if anything else is needed for Clear To Close. Nothing further is needed from you at this point.

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