

How To Submit Conditions for Review

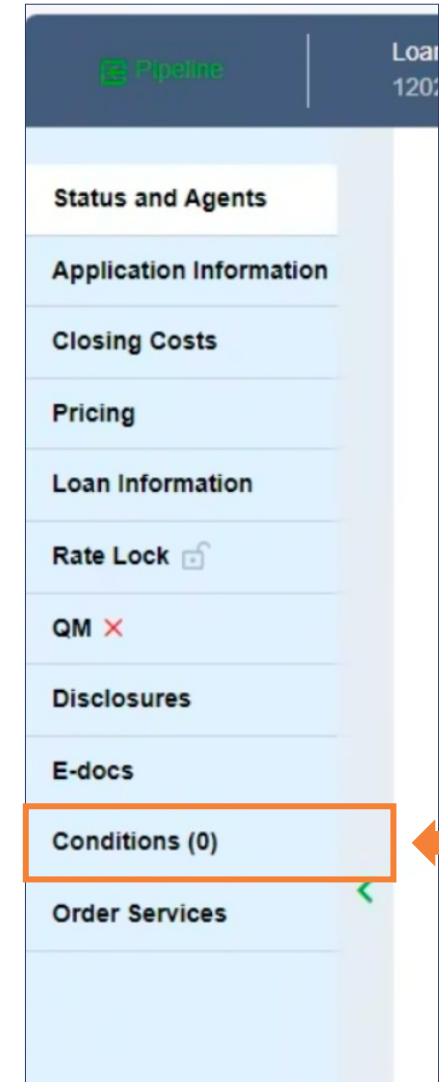


How to Submit Conditions for Review

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.



How to Submit Conditions for Review

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.

□ 5 Active RESOLVE DJLPWCN / PTA COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS Opened and assigned by Nancy Perkins 9/4/2024 10:14 AM PT view all

Requirement: None

Association: None 10/04/2024 Jeff Broker

associate previously uploaded

Drag and Drop Files Here Files to Upload (Max 12):

OR SELECT FILES TO UPLOAD

Requirement: None

This is the condition number.

This is the condition category.



How to Submit Conditions for Review

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”.

Upload Docs ✕

Condition	Category	Subject	Required DocType
DJLPWCN	PTA	COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS	None

Please select document(s) to upload and associate with this condition.

File Name	Doc Type	Description	Application	Status	
USPS.pdf	select Doc Type ✕	<input type="text"/>	Nancy Perkins ▾	<input type="text"/>	remove

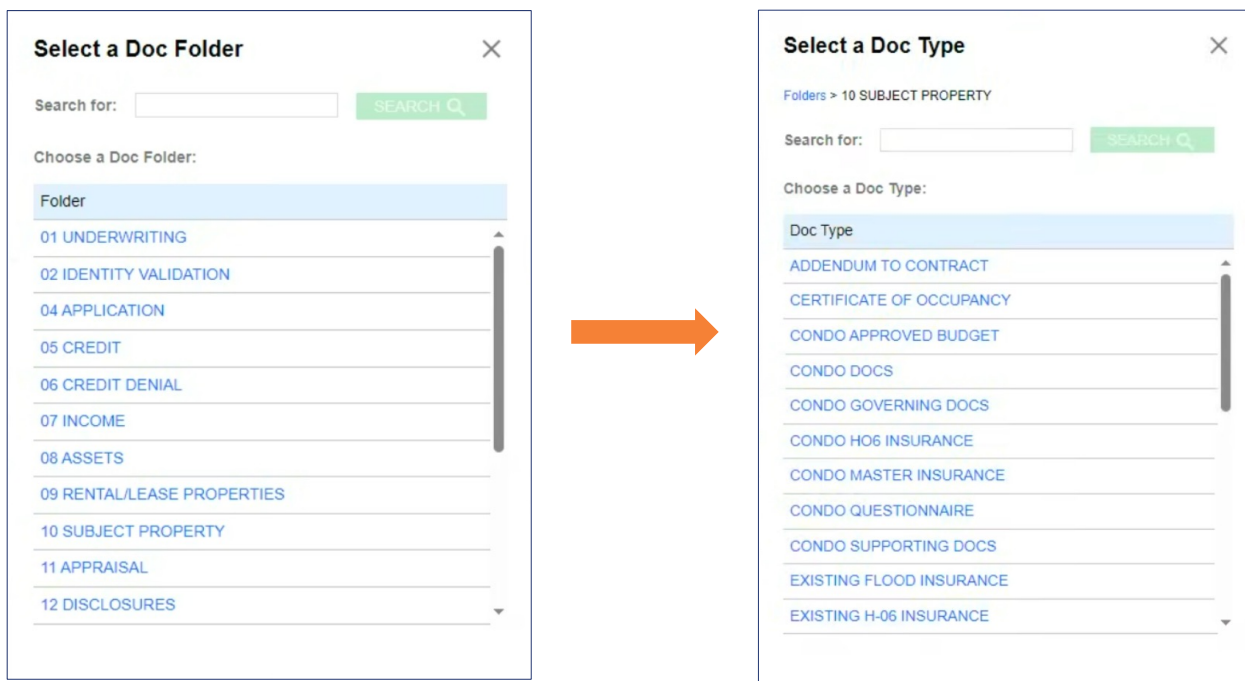
[CANCEL](#) [UPLOAD DOCUMENT](#)



How to Submit Conditions for Review

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.



The image shows two sequential screenshots of a web application interface, connected by an orange arrow pointing from left to right.

Left Screenshot: Select a Doc Folder

- Search for: SEARCH Q
- Choose a Doc Folder:
- Folder
- 01 UNDERWRITING
- 02 IDENTITY VALIDATION
- 04 APPLICATION
- 05 CREDIT
- 06 CREDIT DENIAL
- 07 INCOME
- 08 ASSETS
- 09 RENTAL/LEASE PROPERTIES
- 10 SUBJECT PROPERTY
- 11 APPRAISAL
- 12 DISCLOSURES

Right Screenshot: Select a Doc Type

- Folders > 10 SUBJECT PROPERTY
- Search for: SEARCH Q
- Choose a Doc Type:
- Doc Type
- ADDENDUM TO CONTRACT
- CERTIFICATE OF OCCUPANCY
- CONDO APPROVED BUDGET
- CONDO DOCS
- CONDO GOVERNING DOCS
- CONDO HO6 INSURANCE
- CONDO MASTER INSURANCE
- CONDO QUESTIONNAIRE
- CONDO SUPPORTING DOCS
- EXISTING FLOOD INSURANCE
- EXISTING H-06 INSURANCE



How to Submit Conditions for Review

Upload Document

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

Upload Docs

Condition	Category	Subject	Required DocType
DJLPWCN	PTA	COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS	None

Please select document(s) to upload and associate with this condition.

File Name	Doc Type	Description	Application	Status	
USPS.pdf	10 SUBJECT PROPERTY : ADDENDUM TO CONTRACT change Doc Type ✓	<input type="text"/>	Nancy Perkir ▾	<input type="text"/>	remove

[CANCEL](#) [UPLOAD DOCUMENT](#)



How to Submit Conditions for Review

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.

The screenshot displays a web interface with a table of documents and a detailed view of an association. The table has the following columns: a checkbox, a status, a reference ID, a document title, and an assignment date. The document title is "COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS". The assignment date is "10/04/2024". A green "RESOLVE" button is visible next to the checkbox. To the right, the "Association" details panel shows the document is linked to "10 SUBJECT PROPERTY : ADDENDUM TO CONTRACT" and lists the user "Jeff Broker". An orange arrow points to the "Association" section. Below the association details is a file upload area with a "Drag and Drop Files Here" instruction, a "Files to Upload (Max 12):" label, and a green "OR SELECT FILES TO UPLOAD" button. The "Requirement" for this association is listed as "None".

Checkbox	Status	Reference ID	Document Title	Assignment Info
<input type="checkbox"/>	Active	DJLPWCN / PTA	COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS	Opened and assigned by Nancy Perkins 9/4/2024 10:14 AM PT view all

Association:

- [unlink](#) 10 SUBJECT PROPERTY : ADDENDUM TO CONTRACT 10/04/2024 Jeff Broker
- [associate previously uploaded](#)

Requirement: None

Files to Upload (Max 12):

[OR SELECT FILES TO UPLOAD](#)

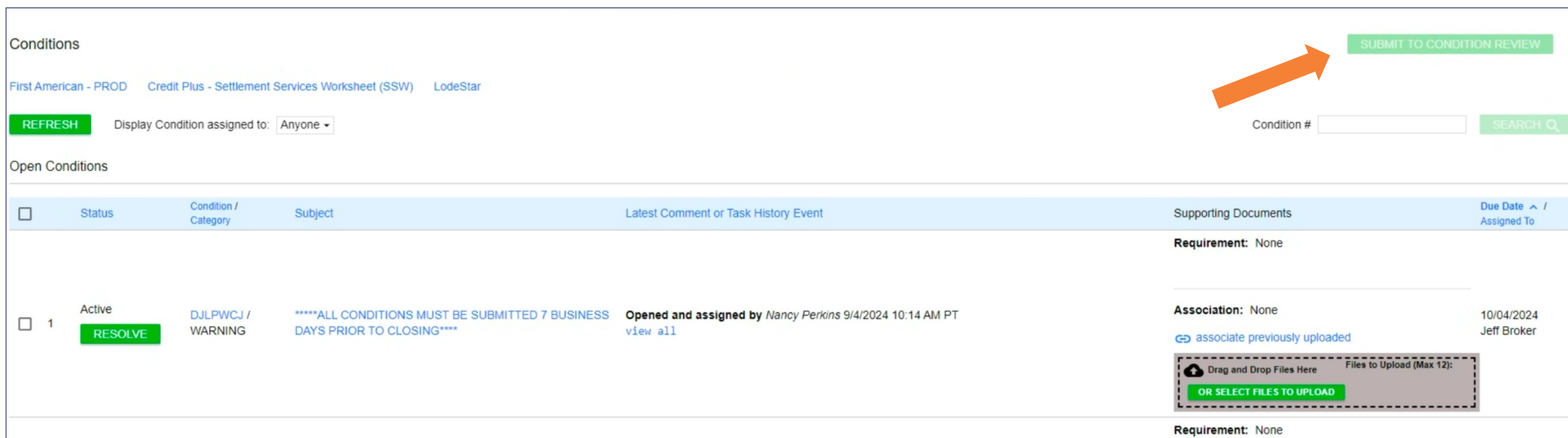


How to Submit Conditions for Review

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.



The screenshot shows a web application interface for managing conditions. At the top right, there is a green button labeled "SUBMIT TO CONDITION REVIEW" with an orange arrow pointing to it. Below this, there is a search bar with the text "Condition #" and a "SEARCH" button. The main content area is titled "Open Conditions" and contains a table with the following columns: Status, Condition / Category, Subject, Latest Comment or Task History Event, Supporting Documents, and Due Date / Assigned To. The table has one row with the following data:

Status	Condition / Category	Subject	Latest Comment or Task History Event	Supporting Documents	Due Date / Assigned To
Active RESOLVE	DJLPWCJ / WARNING	*****ALL CONDITIONS MUST BE SUBMITTED 7 BUSINESS DAYS PRIOR TO CLOSING****	Opened and assigned by Nancy Perkins 9/4/2024 10:14 AM PT view all	Requirement: None Association: None associate previously uploaded	10/04/2024 Jeff Broker

Below the table, there is a file upload section with a dashed border and the text "Drag and Drop Files Here" and "Files to Upload (Max 12):". Below this is a green button labeled "OR SELECT FILES TO UPLOAD".



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.

