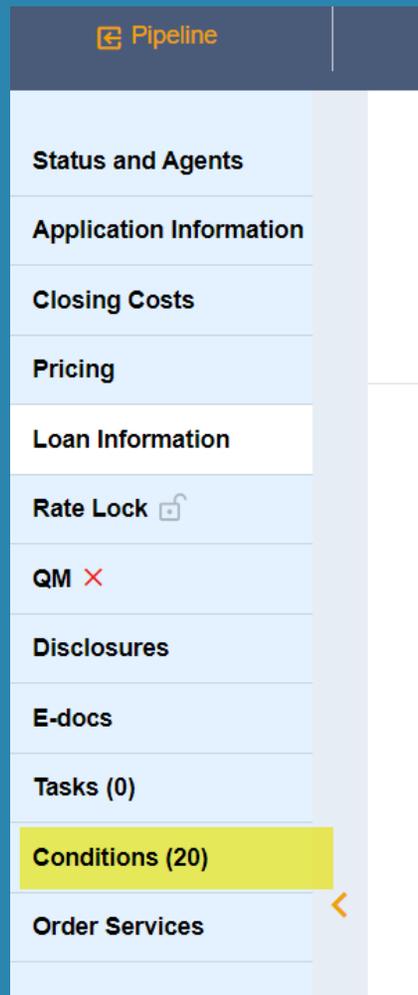




How To Submit Conditions For Review



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.



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 attached the document

7 Active **RESOLVE** DDG7MNK / PTA IF P&L INCOME TYPE PLEASE PROVIDE A SIGNED AND DATED CPA PREPARED PROFIT AND LOSS STATEMENT COVERING THE MOST RECENT 12 MONTHS. Opened and assigned by *Jeff Broker* 7/11/2023 6:06 PM PT [view all](#)

Requirement: None

Association: None

08/10/2023
Jeff Broker

[associate previously uploaded](#)

Drag and Drop Files Here Files to Upload (Max 12):
OR SELECT FILES TO UPLOAD

This is the condition number.

This is the condition category.



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
DDG7MNK	PTA	IF P&L INCOME TYPE PLEASE PROVIDE A SIGNED AND DATED CPA PREPARED PROFIT AND LOSS STATEMENT COVERING THE MOST RECENT 12 MONTHS.	None

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

File Name	Doc Type	Description	Application	
Condition 1.pdf	select Doc Type ✕	<input type="text"/>	Andy America ▾	remove

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

Once you upload a document a new window will pop up and you will select the appropriate Doc Folder and then Doc Type . You can search for a specific folder or Select the Folder then Doc Type.

Select a Doc Folder ✕

Search for: SEARCH Q

Choose a Doc Folder:

Folder
02 IDENTITY VALIDATION
05 CREDIT
07 INCOME
08 ASSETS
09 RENTAL/LEASE PROPERTIES
10 SUBJECT PROPERTY
11 APPRAISAL
12 DISCLOSURES
15 ORIGINATOR LOCK CONFIRMATION
21 TPO
GENERATED DOCUMENTS



Select a Doc Folder ✕

Search for: SEARCH Q

Choose a Doc Folder:

Folder
02 IDENTITY VALIDATION
05 CREDIT
07 INCOME
08 ASSETS
09 RENTAL/LEASE PROPERTIES
10 SUBJECT PROPERTY
11 APPRAISAL
12 DISCLOSURES
15 ORIGINATOR LOCK CONFIRMATION
21 TPO
GENERATED DOCUMENTS

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
DDG7MNK	PTA	IF P&L INCOME TYPE PLEASE PROVIDE A SIGNED AND DATED CPA PREPARED PROFIT AND LOSS STATEMENT COVERING THE MOST RECENT 12 MONTHS.	None

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

File Name	Doc Type	Description	Application
Condition 1.pdf	21 TPO : UW CONDITIONS change Doc Type <input checked="" type="checkbox"/>	<input type="text"/>	Andy America <input type="button" value="remove"/>

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

2

Active

RESOLVE

D9KL6WW / PTA

COMPLETE CHECKING ACCOUNT STATEMENTS FROM THE MOST RECENT 2 MONTHS SHOWING SUFFICIENT FUNDS TO CLOSE AND 6 MONTHS RESERVES

Opened and assigned by *Jeff Broker* 1/4/2023 10:49 AM PT
[view all](#)

Requirement: None

Association:

[unlink](#) GENERATED DOCUMENTS : INITIAL 02/03/2023
 DISCLOSURE Jeff Broker

[associate previously uploaded](#)

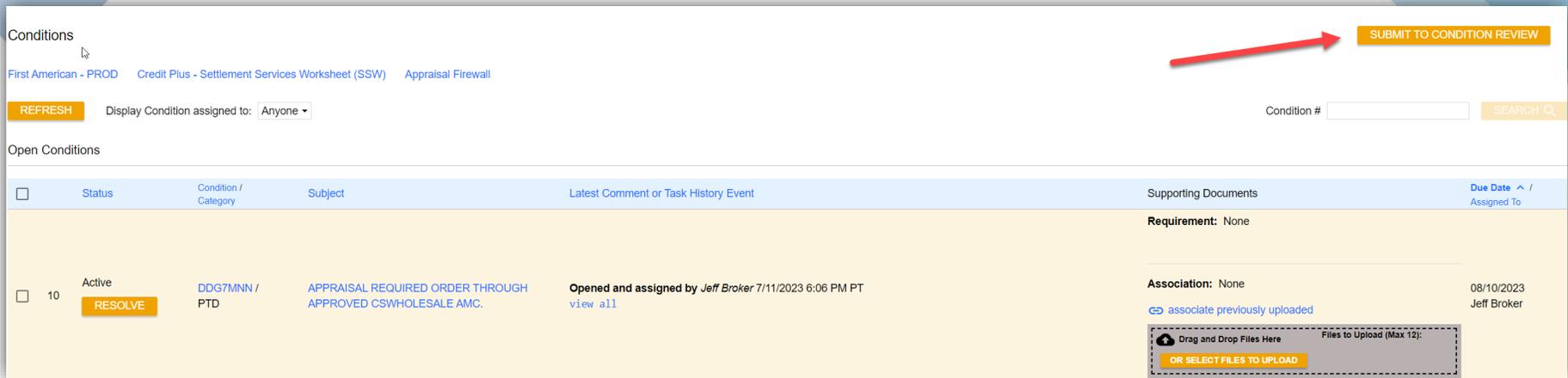
Drag and Drop Files Here Files to Upload (Max 12):
OR SELECT FILES TO UPLOAD

 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.

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.



The screenshot displays a web interface for managing loan conditions. At the top, there are navigation links for 'First American - PROD', 'Credit Plus - Settlement Services Worksheet (SSW)', and 'Appraisal Firewall'. A 'REFRESH' button and a dropdown menu for 'Display Condition assigned to: Anyone' are visible. On the right, a search bar for 'Condition #' is present, and a yellow button labeled 'SUBMIT TO CONDITION REVIEW' is highlighted with a red arrow. Below this is a table of 'Open Conditions' with columns for Status, Condition / Category, Subject, Latest Comment or Task History Event, Supporting Documents, and Due Date / Assigned To. One condition is listed with status 'Active', ID '10', and a 'RESOLVE' button. The 'Supporting Documents' section for this condition shows 'Requirement: None', 'Association: None', and a file upload area with a 'DRAG AND DROP FILES HERE' instruction and a 'SELECT FILES TO UPLOAD' button.

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 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.





Contact Us

🌀 If you have any questions, please reach out to your Junior Underwriter for assistance.

