



Managing conditions

- Access the conditional approval form your Pipeline Summary.
- Select the **Green** bubble out to the right side of the screen to view:

Currently viewing active Loans
Pipeline total:\$464,000 in 1 loan(s)
Average loan:\$464,000

| BORROWER | LOAN# | STATUS | PRODUCT | ORIGINATOR | AMOUNT | UWD | ACTIONS |
|------------|--------|-----------------|-------------|------------|-----------|--|---------|
| [Redacted] | 322368 | UW - Appr w Con | Conv Flx 30 | [Redacted] | \$464,000 | A | |

1 Loan(s) in view of 1 total

- You will handle any conditions listed as **Originator Responsibility** and we handle the rest.
- Documents can be attached to conditions by clicking on the paper icon out to the right:

| Loan Approved | | | | |
|---|--|------------|----------------|--------|
| Please review the conditions listed below and submit the requested information. | | | | |
| [-] Open Conditions (Hide) | | | | |
| Code | Condition | Type | Responsibility | Status |
| | **FILE EXPIRATION DATES: Credit:6/11 Income: B1:5/5 B2: 5/20 Assets: 5/11 Appraisal: TBD Contract: 3/17 Title: TBD CPL: TBD Refresh:TBD VVOE: TBD SE VVOE: NA | 2 Approval | Originator | |
| | *1003 LOAN CHANGES: If any changes are made to the file such as adding/removing assets, debts, changing loan amt, loan program, rate, etc: Provide detailed cover letter or resubmission notes to underwriter. | 2 Approval | Originator | |
| | *All parties to sign and date the following purchase contract addendums: 1) add Avenue to subject property address; 2) Loan submitted with seller paying a portion of buyer's closing costs which is not specified in the purchase agreement provided? | 2 Approval | Originator | |
| | *Assets: Source EMD AND Opt Fee in the amount of \$5800 has been paid. | 2 Approval | Originator | |

Continued on next page>>>

- Label documents from the drop-down menu provided to as close to what they actually are “i.e. Pay Stub, LOE, Bank Statement, etc...” and then save.
- Please **DO NOT** label conditions “Submission Package”.
- Please **DO NOT** upload the same document to multiple conditions. Instead, attach to the first condition it applies to and your CAM (Client Account Manager) will ensure all conditions are cleared that the document covers.

REMINDER: If you have already submitted your loan, be sure to perform the loan action Update Lender, after uploading your documents

Select File(s) to Upload (50MB File Limit)

Select Files

● Bank Statements.pdf × Remove

Type: **Assets - Earnest Money** Description: Bank Statements Folder: Uploads

Note:

Drag and drop files into the space above to add.

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Save Files

- Please **DO NOT** use the NOTES section above as the Underwriter’s cannot see this field. Instead, please upload a processor or LO certification/ note to the file conditions as needed.

Continued on next page>>>

- When ready for resub go to: **Loan Actions> Update Lender>Update Lender**

BORROWER

☰

- Pipeline Summary
- Loan Snapshot
- Loan History
- Loan Info
- Loan Contacts
- Edit 1003
- Edit Fees Worksheet
- Request Documents
- Edit TIL
- Edit 1008
- Price / Lock
- Fee Sheet
- HMDA
- Update Loan
- Export Loan
- Cancel Loan
- Processing
- Submit to Processor
- Upload Documents
- Send DocLink Request
- View Closing

- Order Credit
- Submit to Lender
- Closing Request
- Update Lender**
- Order Appraisal
- Merge Liabilities
- Fraud Filter
- Flood Certification
- Submit To Doc Provider
- Compliance
- Early Check
- Services

1 **Select documents to send**

Document

- 1003 Loan Application
- Truth-in-Lending Disclosure Statement
- Estimated Fees

2 **Enter comments to send along with the documents**

 **Update Lender**

[\(View Lender Information\)](#)