Submitting Conditions

Contents:
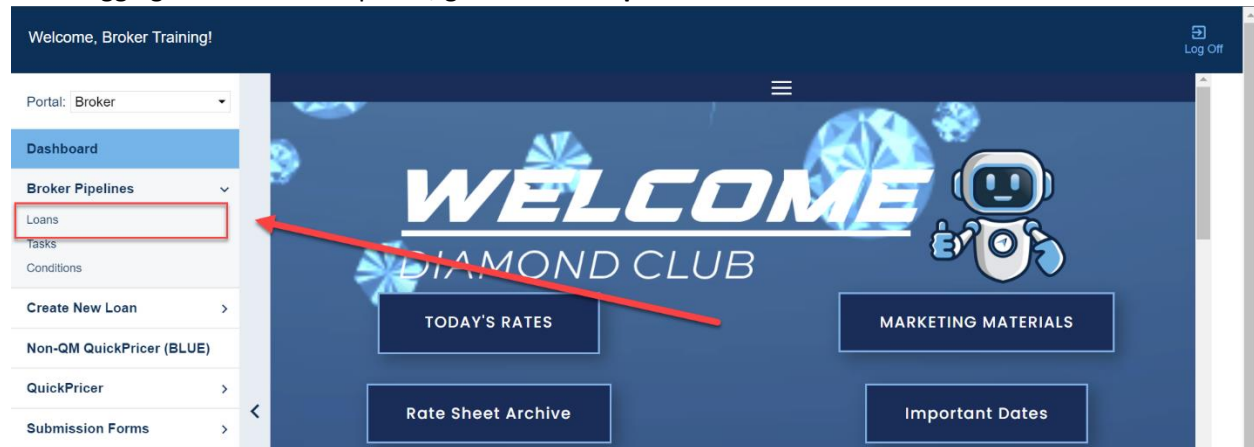
Introduction

Once a loan has been submitted to BluePoint Mortgage, the assigned underwriter will soon send you a list of approval conditions. These conditions must be resolved before the loan can advance to CTC and Funded.

Getting There

After logging into our broker portal, go to **Broker Pipelines > Loans**:

Click on the **Conditions** link for a specific loan:

You will then see the conditions specific to that loan. Note that some conditions are internal BPM conditions and do not require work from you. **We recommend sorting the list by assignment to easily see which conditions are assigned to you.**

Most of the time, you will be assigned Prior to Docs (PTD) and Prior to Funding (PTF) conditions.

Uploading Conditions

For each active condition assigned to you, please upload the relevant documents (if applicable) to the appropriate condition:

Be sure to select the appropriate Doc Type for the document (if you can't find the Doc Type, use the "Outstanding Conditions" Doc Type:

Upload Docs ✕

Condition	Category	Subject	Required DocType
CFGMFJW	PTF	FINAL TERMS ON DU, FINAL 1003 & 1008 TO MATCH (UNDERWRITER TO REVIEW)	None

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

File Name	Doc Type	Description	Application	
How_to_submit_a_loan.pdf	select Doc Type ❌		Test1 Test2 ▾	remove

CANCEL   UPLOAD DOCUMENT

Select **Upload Document** to finish uploading:

Upload Docs ✕

Condition	Category	Subject	Required DocType
CFGMFJW	PTF	FINAL TERMS ON DU, FINAL 1003 & 1008 TO MATCH (UNDERWRITER TO REVIEW)	None

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

File Name	Doc Type	Description	Application	
How_to_submit_a_loan.pdf	**OUTSTANDING CONDITIONS** : OUTSTANDING CONDITIONS change Doc Type ✅		Test1 Test ▾	remove

CANCEL   UPLOAD DOCUMENT

Repeat the steps above for all conditions assigned to you. **Do _not_ click on the Resolve buttons next to each condition**. Instead, once all conditions are completed notify your Account Manager and they will review your conditions.

Questions?

Please contact your AE or account manager if you have questions about conditions.

Thank you for choosing BluePoint Mortgage!