

# Submitting Conditions

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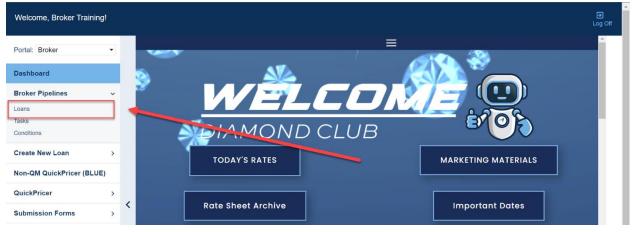
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## Introduction

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:

Welcome, Broker Training!												<b>⋺</b> Log Of
Portal: Broker	•	Loans										
Dashboard												
Broker Pipelines	~	Search	Loan Number		Last Name		SSN (Last 4)	Email A	ddress	Phone Numbe	er	
Loans Tasks Conditions			Status Date All Dates	Loan St ≺Any-		• S	EARCH Q	CLE	AR SEARCH			
Create New Loan	>	Display most r	recent 25 -	loans assigne	ed to anyone -							
Non-QM QuickPricer (BLUE)		Loan N	umber	Condition	is Tasks	Last Name, First Name		Loan Amt	Loan Status / Status Date  ∽	Lock Status / Lock Exp. Date	Loan Officer / Processor	
QuickPricer Submission Forms	> > <	🖍 Brian Te	est	0 Conditi	on 0 Task	Test2, Test1		\$750,000	Document Check 6/9/2022		LO Broker Training	
Order Appraisals			Training	1 Conditi	on 0 Task	Test2, Test1		\$560,000	Registered 6/2/2022		LO Broker Training P Broker Training	
Products Broker Resources	>	🖍 Task Te	esting	31 Condi	tions 1 Task	Test2, Test1		\$560,000	Final Underwriting 5/9/2022		LO Broker Training P Broker Training	

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.

Conditio					SUBMIT TO CONDITI	
REFRE		ondition assigne	d to: Anyone -		Condition #	SEARCH Q
	Status	Condition / Category	Subject	Latest Comment or Task History Event	Supporting Documents	Assigned To 🗸
129	Active RESOLVE	CFGMFJW / PTF	FINAL TERMS ON DU. FINAL 1003 & 1008 TO MATCH (UNDERWRITER TO REVIEW)	Reactivated and assigned by Broker Training 6/14/2022 11.27 AM PT view all	Association: None  (c) associate previously uploaded  C) Associate previously uploaded	06/23/2022 Broker Training
					Orag and Drop Files Here     Files to Upload (Max 12)     OR SELECT FILES TO UPLOAD	

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:

Conditior	IS				SUBMIT TO CONDITI	ON REVIEW
REFRES		Condition assigne	d to: Anyone -		Condition #	SEARCH Q
	Status	Condition / Category	Subject	Latest Comment or Task History Event	Supporting Documents Requirement: None	Due Date / Assigned To 🗸
129	Active RESOLVE	CFGMFJW / PTF	FINAL TERMS ON DU, FINAL 1003 & 1008 TO MATCH (UNDERWRITER TO REVIEW)	Reactivated and assigned by Broker Training One 2002.11:27 AM PT view all	Association: None  G associate previously uploaded  Torg and Drop Files Nere  Files to Upload (Max 12)  OR SELECTERES TO UPLOAD	

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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 X								
Condition	Category	Subject			Requi	red DocType		
CFGMFJW	PTF	,	FINAL TERMS ON DU, FINAL 1003 & 1008 TO MATCH None UNDERWRITER TO REVIEW)					
Please selec	t documer	nt(s) to upload and asso	ociate with this condition	n.				
File Name		Doc Type	Description		Application			
How_to_sub	omit_a_loar	n.pdf select Doc Type	8 8	11	Test1 Test2 ▼	remove		
				CANCEL		OCUMENT		

#### Select Upload Document to finish uploading:

Upload [	Docs			×
Condition	Category	Subject		Required DocType
CFGMFJW	PTF	FINAL TERMS ON DU, FINAL 1003 & 100 (UNDERWRITER TO REVIEW)	08 TO MATCH	None
Please selec	t documer	nt(s) to upload and associate with this co	ondition.	
File Name		Doc Туре	Description	Application
How_to_sub	omit_a_loar	**OUTSTANDING CONDITIONS** : n.pdf OUTSTANDING CONDITIONS change Doc Type		Test1 Test • remove
			CANCEL	UPLOAD DOCUMENT

Repeat the steps above for all conditions assigned to you. **Do** <u>not</u> 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!

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