

Submitting Conditions

Contents:

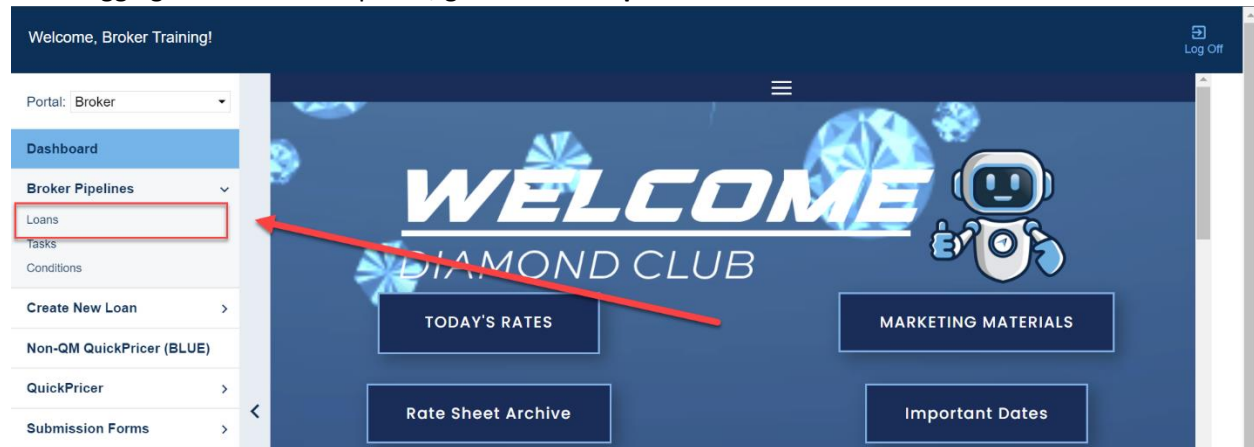
Introduction	1
Getting There	1
Uploading Conditions.....	2
Questions?	3

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! Log Off

Portal: Broker

Loans

Search: Loan Number, Last Name, SSN (Last 4), Email Address, Phone Number

Criteria: Status Date (All Dates), Loan Status (<--Any-->)

Display most recent 25 loans assigned to anyone

Loan Number	Conditions	Tasks	Last Name, First Name	Loan Amt	Loan Status / Status Date	Lock Status / Lock Exp. Date	Loan Officer / Processor
Brian Test	0 Condition	0 Task	Test2, Test1	\$750,000	Document Check 6/9/2022		LO Broker Training
Broker Training	1 Condition	0 Task	Test2, Test1	\$560,000	Registered 6/2/2022		LO Broker Training P Broker Training
Task Testing	31 Conditions	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.**

Conditions SUBMIT TO CONDITION REVIEW

REFRESH Display Condition assigned to: Anyone Condition # SEARCH

Open Conditions

Status	Condition / Category	Subject	Latest Comment or Task History Event	Supporting Documents	Assigned To
Active	CFGMF/JW / 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	Requirement: None Association: None associate previously uploaded Drag and Drop Files Here Files to Upload (Max 12): OR SELECT FILES TO UPLOAD	Assigned To

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:

Conditions SUBMIT TO CONDITION REVIEW

REFRESH Display Condition assigned to: Anyone Condition # SEARCH

Open Conditions

Status	Condition / Category	Subject	Latest Comment or Task History Event	Supporting Documents	Due Date / Assigned To
Active	CFGMF/JW / 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	Requirement: None Association: None associate previously uploaded Drag and Drop Files Here Files to Upload (Max 12): OR SELECT FILES TO UPLOAD	06/23/2022 Broker Training

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!