

## **Managing Conditions**

All conditions are housed and managed in the Conditions tab of the TPO Portal.

- Conditions must be uploaded to the Conditions tab, upon resubmission.
- Files will only be returned to Underwriter for review, when <u>all</u> PTD conditions have been received.
- Always click on the Notify Lender button, once all conditions have been uploaded.



## **Uploading Documents**

- 1. Click on the Conditions tab from the left-hand menu, to display all the open conditions.
  - You may filter the conditions by type or category for easier viewing.
  - Each condition will be listed as an individual line item.

	FILTER B	Y Type •	All	~	Expand All		Collapse All		
	7						Max	attachment	t size is 20
S LOAN ESTIMATE FEE MANAGEMENT	Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status I
	- Misc	***Exception required***	Approval	01/02/24		44		Added	01/02/2
🖶 ESIGN		(1) borrower does no trade liens (not 3) red	t have the re quired is 2 p	quired primary us 12 month ho	12 month housin	g histo	ry that is required p	oer program	n (2) Borro
loconditions									
DISCLOSURE TRACKING	<ul> <li>Credit</li> </ul>	**Mortgage Pay History - Updated	Approval 1	01/03/24		43		Added	01/03/2
LOAN ACTIONS		provide mortgage ra	ting/vom/pa	/ history for 12	months for Jpmcl	o #477	9 on 11 Kingsley an	d Rushmore	e #0292 o

- 2. Each condition will display an upload function.
  - Only upload documents that pertain to each condition.
  - You may click on the **Browse for Files** button, to select the documents that need to be uploaded. Or simply drag & drop the documents to the condition.
  - Comments may be added to each condition for Account Manager to review, if needed.

Assets	Assets - Account Statements	Docs	12/29/23	48	ж к	Added	12/29/23	0	Ready for Review
	Provide additional stat	ment for Ci	tizens Bank #1515						
	ASSETS - BANK S	TATEMENT			Commer	nts Drag & I	Drop files here or	E	Browse for files

- 3. Once all conditions have been uploaded, click on the **Notify Lender** button at the top right.
  - Once button is clicked, a notification will be sent to Account Manager to review the new documentation uploaded and resubmit file to the Underwriter.
  - Failure to click on the Notify Button will result in a processing delay.

	FILTER BY Type All Collapse All Notify Lender I Max attachment size is 200 MB. View Supported Files.									Lender 👔 🚍	
	Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	$\Box$	Action
•	Misc	***Exception required***	Approval	01/02/24		44		Added	01/02/24	0	Ready for Review
		(1) borrower does not have the required primary 12 month housing history that is required per program (2) Borrower has two current open and active trade liens (not 3) required is 2 plus 12 month housing									

4. A confirmation will appear once Notify lender has been successfully triggered.

