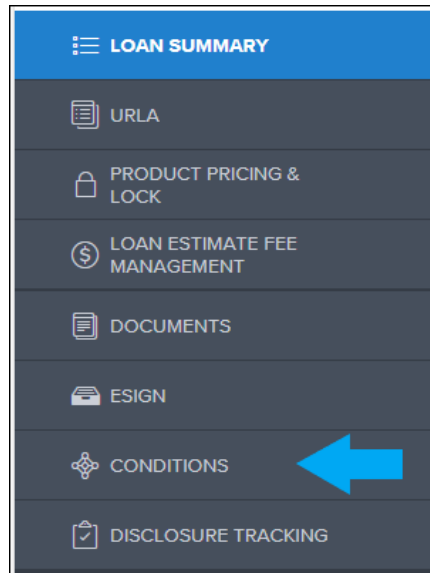


## Managing Conditions

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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 **all** 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.

The screenshot shows a sidebar on the left with the following menu items: URLA, PRODUCT PRICING & LOCK, LOAN ESTIMATE FEE MANAGEMENT, DOCUMENTS, ESIGN, **CONDITIONS** (highlighted with a blue arrow), DISCLOSURE TRACKING, and LOAN ACTIONS. The main content area features a 'FILTER BY' section with 'Type' and 'All' dropdowns, and 'Expand All' and 'Collapse All' buttons. Below this is a table with columns: Category, Condition, Prior to, Date Added, Date Revised, Age, Borrower Pair, Status, and Status. Two rows are visible: one for 'Misc' with condition '\*\*\*Exception required\*\*\*' and another for 'Credit' with condition '\*\*Mortgage Pay History - Updated'. A blue arrow points from the 'CONDITIONS' menu item to the 'FILTER BY' section.



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.

The screenshot shows a document upload area with the following elements: 'Assets - Account Statements', 'Docs 12/29/23', '48', 'Added 12/29/23', '0', and a 'Ready for Review' button. Below this is a section for 'Provide additional statement for Citizens Bank #1515'. At the bottom, there is a bar with 'ASSETS - BANK STATEMENT', a 'Comments' button (indicated by a blue arrow), 'Drag & Drop files here or', and a 'Browse for files' button (indicated by another blue arrow).

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       

Max attachment size is 200 MB. [View Supported Files.](#)

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date		Action
▼ Misc	<b>***Exception required***</b>	Approval	01/02/24		44		Added	01/02/24	0	<input type="button" value="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.

