

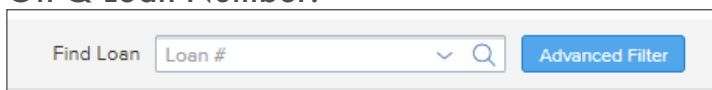
# HOW TO: Upload Documents/Conditions For Review

1. Log onto the portal
2. Find the loan in your recently accessed loans (left hand of the screen) or from your pipeline by selecting the "Pipeline" heading:

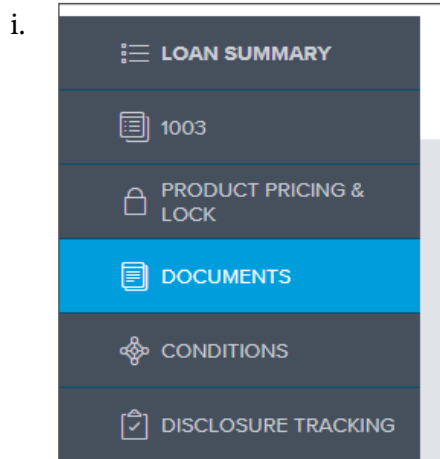


Recently Accessed Loans
<b>101920134458</b> Test 10-27, Vicky \$100,000.00, USDA-RHS, Detached
<b>101920134374</b> Test Conv 10/26, Danielle \$252,000.00, Conventional, Detached
<b>101920134280</b> 10/24, FHA test 1 \$207,475.00, FHA, Detached
<b>101920134254</b> 10/23, Va test 2 \$200,000.00, VA, Detached

From the Pipeline view, you can pull up the loan by clicking on the tiles or searching by the On Q Loan Number:



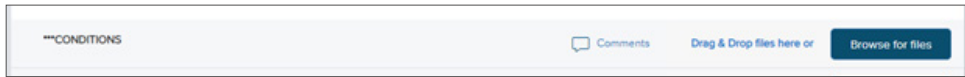
3. Once you are in the loan, there are two ways to upload underwriting conditions: Bulk upload or Attach documents to conditions
  - A. Bulk Upload: Select "Documents" from the left sidebar



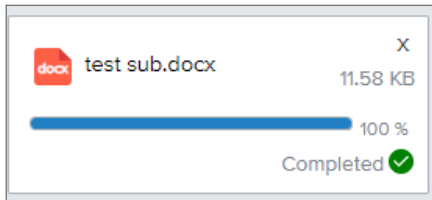
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# HOW TO: Upload Documents/Conditions For Review

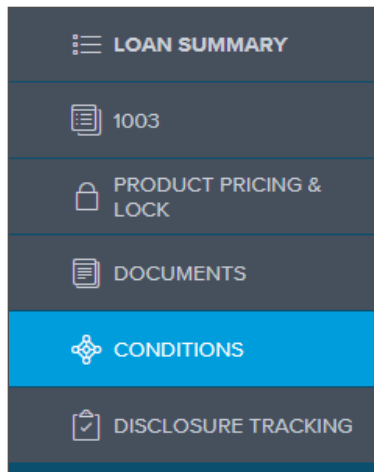
- ii. There will be a folder labeled “\*\*\*Conditions” all conditions can be uploaded into this folder for indexing. The user can drag and drop or browse and attach documents.



- iii. Once the document is uploaded, the file will have a green check mark showing complete:

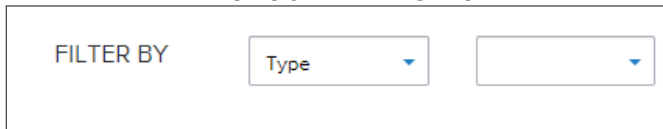


- iv. The processing or loan set-up department will be notified. Any missing items from set-up should be uploaded to this folder or provided in reply all format to the requesting email.
- B. Attach documents to conditions: Select “Conditions” from the left sidebar.



- C. The Conditions tab will take you to all conditions for the loan file.

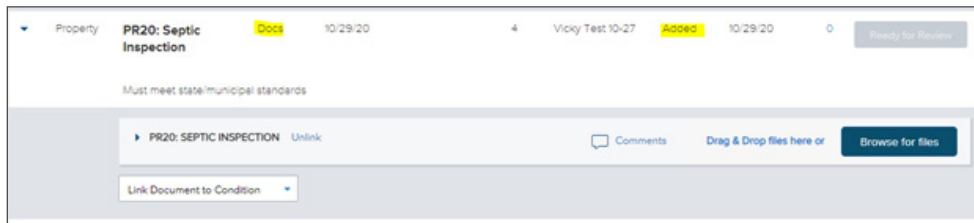
- i. You can filter by type, category and status



- ii. We suggest filtering by type
  - 1. Type: Prior to Approval=suspense conditions, Prior to Docs=all conditions needed for Clear to Close

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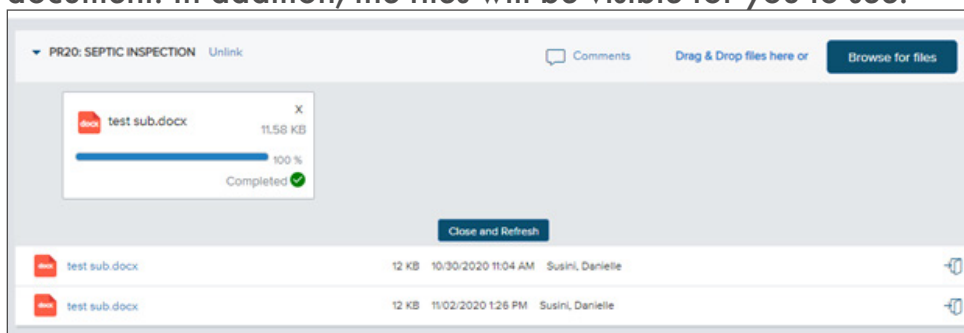
iii. Each condition shows the type and status:



iv. Added references that the condition is outstanding and not received. Received identifies that the processor has received the document, but not reviewed.

D. To add a condition document, find the condition to fulfill. Once located, you can upload directly to the condition by drag and drop or browse for the file.

i. Once the upload is complete, you will see a green circle and completed under the document. In addition, the files will be visible for you to see:



E. The processor will be notified as soon as the condition documentation has been reviewed.

## Tips:

- Documents are accepted via portal upload; Emailed conditions are not accepted
- If you upload a document while the file is already in line for processing condition review, the date and time of last conditions will be updated to the new date of upload if not submit to underwriting
- Processing will email each time conditions are reviewed to identify if the loan has been submit or if conditions were rejected
- All critical conditions including initial appraisal will be submit to underwriting. If there are no critical items and we do not have at least 25% of conditions, the file will be held off from underwriting review. (Underwriting will notate critical items within the conditions)
- If you have an urgent condition not marked critical, processing can submit the loan file based at their discretion. Please make the assigned processor aware of the issue and for them to submit without the 25% or critical items
- Suspense and declination conditions will ALWAYS be submitted to underwriting and can be piecemealed. We will not order an appraisal until the loan file is approved.