

B.O.L.T. TRAINING

Lesson 20 - Submitting Conditions



In This Training We Will Discuss

- Submitting Conditions
 - Underwriting
 - Funding



Submitting Conditions

Status and Agents

Status

Current Status: Approved Status Date: 2/13/2019 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Pre-Approved **Approved** Cond Review Funded

1/24/2019 2/13/2019

Agents

Assigned Agents in *TPO LQB Testing

Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

1. Within a loan, click “Conditions”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: **Anyone**

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WMN6L7 / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div><div>Requirement: ✖ Not Satisfied</div><div>PROPERTY : APPRAISAL</div><div>Association: None</div><div>associate previously uploaded</div><div><div><div>Drag and Drop Files Here</div><div>OR SELECT FILES TO UPLOAD</div></div><div>Files to Upload (Max 12):</div></div></div>	<div>12/31/2018</div> <div>Matthew Baker</div>

LIVE CHAT

To Display All Conditions For The Loan

2-A. Choose “Anyone” in the “Display Conditioned Assigned To” dropdown.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: **Me** ▼

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date ^ / Assigned To
<input type="checkbox"/>	Active	9WMN6L7 / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div> <div>associate previously uploaded</div> <div><div><div> Drag and Drop Files Here</div><div>Files to Upload (Max 12):</div><div>OR SELECT FILES TO UPLOAD</div></div></div>	12/31/2018 Matthew Baker

Requirement: None

LIVE CHAT

To Display Conditions Only You, The Broker, Needs To Complete

2-B. Choose “Me” in the “Display Conditioned Assigned To” dropdown.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: Me

Condition #

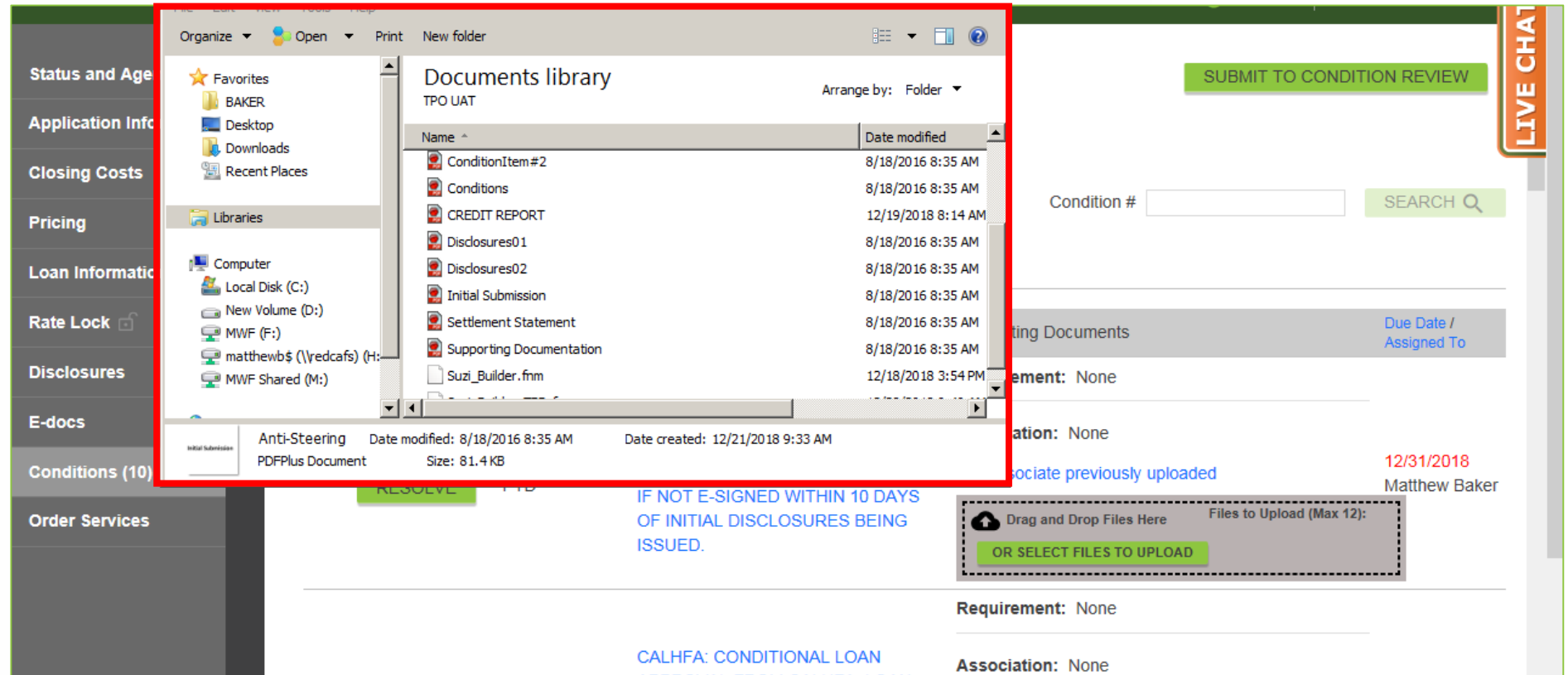
SEARCH

Open Conditions

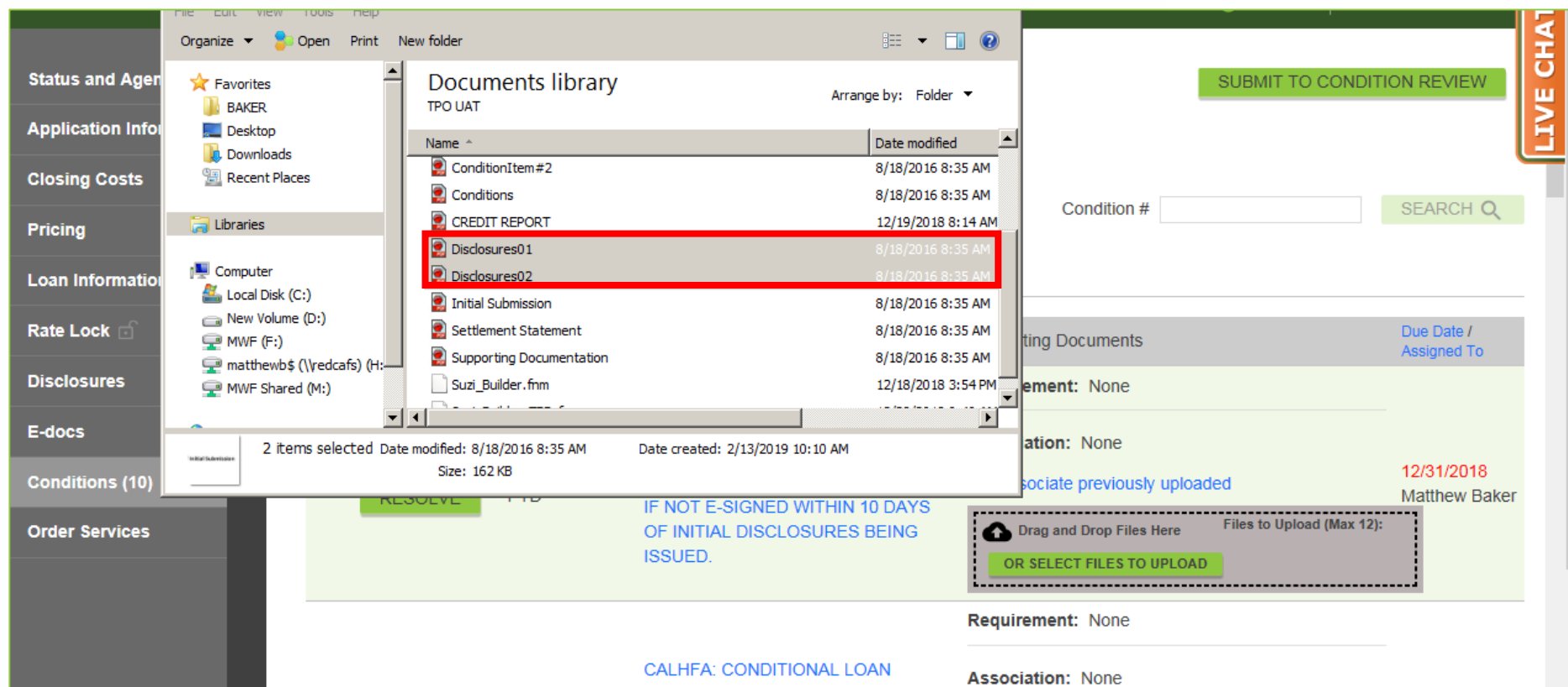
<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WMN6LM / PTD	INITIAL TRID PACKAGE (ISSUED BY MWF) SIGNED BY ALL BORROWERS AND LOAN ORIGINATOR FOR EACH MWF LOAN. MUST BE LIVE SIGNED IF NOT E-SIGNED WITHIN 10 DAYS OF INITIAL DISCLOSURES BEING ISSUED.	<div>Requirement: None</div> <div>Association: None</div> <div>associate previously uploaded</div> <div><div>Drag and Drop Files Here</div><div>Files to Upload (Max 12):</div><div>OR SELECT FILES TO UPLOAD</div></div>	<div>12/31/2018</div> <div>Matthew Baker</div>
			CALHFA: CONDITIONAL LOAN	<div>Requirement: None</div> <div>Association: None</div>	

LIVE CHAT

3. Find the desired Condition.



4. Open up the folder on your computer where the Conditions are saved.



- Find and select the document(s) to be associated to the Condition. Multiple documents can be selected.

The screenshot shows a web application interface for submitting conditions. On the left is a sidebar with navigation links: Status and Agency, Application Information, Closing Costs, Pricing, Loan Information, Rate Lock, Disclosures, E-docs, Conditions (10), and Order Services. The main content area has a green 'SUBMIT TO CONDITION REVIEW' button at the top. Below it is a 'Condition #' input field with a 'SEARCH' button. A table lists 'Uploading Documents' with columns for 'Due Date / Assigned To'. The table shows a row for 'None' with a due date of '12/31/2018' and assigned to 'Matthew Baker'. Below the table is a red-bordered box containing a 'Drag and Drop Files Here' area and a green 'OR SELECT FILES TO UPLOAD' button. The bottom of the interface shows 'Requirement: None' and 'Association: None'. A 'LIVE CHAT' button is on the far right.

Documents library
TPO UAT

Name	Date modified
ConditionItem#2	8/18/2016 8:35 AM
Conditions	8/18/2016 8:35 AM
CREDIT REPORT	12/19/2018 8:14 AM
Disclosures01	8/18/2016 8:35 AM
Disclosures02	8/18/2016 8:35 AM
Initial Submission	8/18/2016 8:35 AM
Settlement Statement	8/18/2016 8:35 AM
Supporting Documentation	8/18/2016 8:35 AM
Suzi_Builder.frm	12/18/2018 3:54 PM

2 items selected Date modified: 8/18/2016 8:35 AM Date created: 2/13/2019 10:10 AM Size: 162 KB

Drag and Drop Files Here Files to Upload (Max 12):
OR SELECT FILES TO UPLOAD

Requirement: None
Association: None

CALHFA: CONDITIONAL LOAN

6. Drag and Drop the document(s) to the Condition.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

Upload Docs

Condition	Category	Subject	Required DocType
9WMN6LM	PTD	INITIAL TRID PACKAGE (ISSUED BY MWF) SIGNED BY ALL BORROWERS AND LOAN ORIGINATOR FOR EACH MWF LOAN. MUST BE LIVE SIGNED IF NOT E-SIGNED WITHIN 10 DAYS OF INITIAL DISCLOSURES BEING ISSUED.	None

Please select document(s) to upload and associate with this condition.

File Name	Doc Type	Description	Application
Disclosures01.pdf	DISCLOSURES : MISC DISCLOSURES change Doc Type ✓		Suzi Builder remove
Disclosures02.pdf	DISCLOSURES : MISC DISCLOSURES change Doc Type ✓		Suzi Builder remove

CANCEL

UPLOAD DOCUMENT

SUBMIT TO CONDITION REVIEW

SEARCH

Due Date / Assigned To

12/31/2018
Matthew Baker

Upload (Max 12):

Association: None

LIVE CHAT

7. Click “Upload Document”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WMN6LM / PTD	INITIAL TRID PACKAGE (ISSUED BY MWF) SIGNED BY ALL BORROWERS AND LOAN ORIGINATOR FOR EACH MWF LOAN. MUST BE LIVE SIGNED IF NOT E-SIGNED WITHIN 10 DAYS OF INITIAL DISCLOSURES BEING ISSUED.	<div>Requirement: None</div> <div>Association:</div> <div> unlink DISCLOSURES : MISC DISCLOSURES unlink DISCLOSURES : MISC DISCLOSURES </div> <div> associate previously uploaded </div> <div> <div>Drag and Drop Files Here</div> <div>Files to Upload (Max 12):</div> <div>OR SELECT FILES TO UPLOAD</div> </div>	<div>12/31/2018</div> <div>Matthew Baker</div>

LIVE CHAT

8. The document(s) will now be associated to the Condition.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WMN6LM / PTD	INITIAL TRID PACKAGE (ISSUED BY MWF) SIGNED BY ALL BORROWERS AND LOAN ORIGINATOR FOR EACH MWF LOAN. MUST BE LIVE SIGNED IF NOT E-SIGNED WITHIN 10 DAYS OF INITIAL DISCLOSURES BEING ISSUED.	<div>Requirement: None</div> <div>Association:</div> <div> unlink DISCLOSURES : MISC DISCLOSURES unlink DISCLOSURES : MISC DISCLOSURES associate previously uploaded </div> <div> <div>Drag and Drop Files Here</div> <div>Files to Upload (Max 12):</div> <div>OR SELECT FILES TO UPLOAD</div> </div>	<div>12/31/2018</div> <div>Matthew Baker</div>

LIVE CHAT

9. Repeat Step #3 to Step #8, for additional Conditions, if any.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (10)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WMN6LM / PTD	INITIAL TRID PACKAGE (ISSUED BY MWF) SIGNED BY ALL BORROWERS AND LOAN ORIGINATOR FOR EACH MWF LOAN. MUST BE LIVE SIGNED IF NOT E-SIGNED WITHIN 10 DAYS OF INITIAL DISCLOSURES BEING ISSUED.	<div>Requirement: None</div> <div>Association:</div> <div> unlink DISCLOSURES : MISC DISCLOSURES unlink DISCLOSURES : MISC DISCLOSURES associate previously uploaded </div> <div> <div>Drag and Drop Files Here</div> <div>Files to Upload (Max 12):</div> <div>OR SELECT FILES TO UPLOAD</div> </div>	<div>12/31/2018</div> <div>Matthew Baker</div>

LIVE CHAT

When All Conditions Have Been Uploaded

10. Click “Submit To Condition Review”.



Important Information

- When the file is submitted to Condition Review, our BOLT Technicians will review and ensure all remaining Conditions are uploaded before they push the loan to Underwriting.
 - Please upload all Conditions prior to submitting to Condition Review, otherwise it will delay the review of your conditions.
- Turn times for Condition Review do vary, so please refer to posted Turn Times.



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>