# **Non-Delegated**

# **Correspondent Lender Reference Guide**

**Mangaing Conditions** 



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# **Table of Contents**

Overview	3
Features of the Conditions Screen	4
Viewing Conditions	5
Export List of Conditions	8
Printing Approval Letter	8
Column Headers on the Conditions Screen	. 9
Uploading Documents to Clear Conditions	9
Choose File	10
Drag & Drop	11



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#### 1. Overview

The Non-Del Portal displays conditions under different tabs: **All, Prior to Approval,** and **Prior to Funding.** Upload the supporting documents for each condition listed and submit the request to satisfy the condition.

The portal accepts pdf, doc, docx, txt, tif, jpg, jpeg, jpg, emf, and xps file formats up to 100 MB.

To export conditions to a spreadsheet, click **\*Export all Conditions** from the **Conditions** screen.

If the loan status is in **Conditional Approval** or **Final Approval**, download the **Approval Letter** from the **Conditions** screen

Conditions		<b>[</b> ] *E	나가 ixport all Conditions >	Approval Letter >
	All	Prior to Approval	Prior to Funding	
Status ADDED ~	/			

#### 2. Features of the Conditions Screen

Loans with unsatisfied conditions have the number of outstanding conditions indicated in the Pipeline.

- 1. Click the number in the **Conditions** column to open the loan directly to the **Conditions** dashboard.
- 2. To view conditions on your loans, click the Loan No. from your Pipeline and open it.

Loan No 🗢	Borrower Name 🗘	Loan Status 🗢	Loan Amount 🗢 🛛 I	Lock Expiration 🗢	Conditions 🗘	Action
9000007426	PA BREYTMAN	Conditional Approval	\$ 117,750		10	~
9000007427	ALICE FIRSTIMER	Conditional Approval	\$ 165,000		4	~
9000007430	ALICE FIRSTIMER	Conditional Approval	\$ 165,000		4	~



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a. Click **Conditions** to navigate to the **Conditions** dashboard.

new URLA - Loan Summary	Conditions			() *E	xport all Conditions >	Approval Letter >
new URLA			All	Prior to Approval	Prior to Funding	]
Product & Pricing ~	Status ADDED	~				
Submit Credit Package				Acceptable File Type	es: pdf, doc, docx, txt, til, jpg, jg	peg, jpe, emf and xps   Note: Max 100M
View/Upload Documents	Prior to 🌩 Cone	ditions 🗢				

**Outcome:** The All tab is the default view and lists all conditions regardless of the category

• If no data is found, the message **Currently there are no conditions to view** displays

new URLA - Loan Summary	Conditions			P *6	oprt all Conditions	Appr	oval Letter >
new URLA			All	Prior to Approval	Prior to Funding		
Product & Pricing Submit Credit Package	Status	~		Acceptable File Type	rs: pdf, doc, docx, txt, tif, jpg,	jpeg, jpe, emf and s	sps   Note: Max 100Mi
View/Upload Documents	Prior to 🗢	Conditions \$	Expand details	Open/Revised	Received ©	Status 🗘	Attach Docs
			Curren	tly there are no conditions	to view		

#### **Viewing Conditions**

The **Conditions** dashboard features options to view by category or **Status**.

1. Select a condition category using the category bar at the top of the Conditions screen.

Conditions	Export all Conditions      Approval Letter
	All Prior to Approval Prior to Funding
Status	<u> </u>
	Acceptable File Types: pdf, doc, docx, txt, tif, jpg, jpeg, jpe, emf and xps   Note: Max 100MB



2. Filter the list by **Status** by selecting the appropriate status from the drop-down list

ia File Types: pill, doc, docs, tot, 51, jpg, jpeg, jps, emf and sps   Note: Max 1
ie File Types: pdf, duc, ducs, tel, 10, jpg, jpeg, jpe, eml and sps   Note: Max 1
sie File Types: pdf, doc, docx, txt, tif, jpg, jpeg, jpe, errf and sps   Note: Max 1
Status & Attach Docs Docs Mo

3. Click the <sup>v</sup> icon for **Expand Details** to display the details of the condition.

			Acceptable	Pile types pat, ooc, oocx, tit,	or, jpg. jpeg. jpe, emr an	o xps   reote: Max
Prior to 0	Conditions 0	Expand details	0	Received 0	Status 0	Attach Docs
Docs	I - CONDITIONAL APPROVAL	~	-m		Added	Drag & Drop or Choose File
						Dens # Dens

*Note:* If the Underwriter enters a comment supporting the condition, the comment displays under **Revision Comments** when viewing the condition details

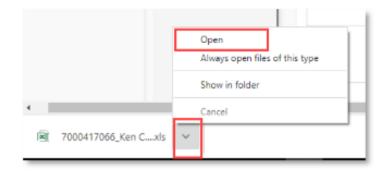
• **Revision Comments** has a **Read More** button to view the entire comment in a separate dialogue box.

#### **Export List of Conditions**

1. To export the list of conditions to an Excel workbook, click \*Export all Conditions.



2. Click the <sup>v</sup> icon. Select **Open**.

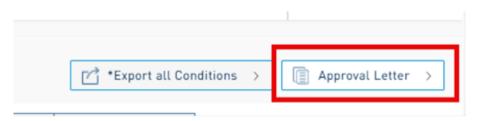


*Outcome:* A file opens in Excel.

<ul> <li>This PC &gt; Downloads</li> </ul>						
	^	Name	Date modified	Туре	Size	
		7000417066_Ken Customer_5_4_2021_23	5/4/2021 7:09 PM	Microsoft Excel 97		21 K

#### **Printing Approval Letter**

1. To print a Conditional Approval Letter, click **Approval Letter.** 



*Note:* This button is enabled when the loan is in either **Conditional Approval** or **Final Approval** status.

*Outcome:* The document appears in the lower-left corner of the page.

	Application-initiat	Added	or Choose Fi	
1			Drag & Dr	+
Conditional Approval.p	ef ^		Show all	×



# 3. Column Headers on the Conditions Screen

The following section describes the dashboard columns when viewing the list of conditions.

Conditions				ස්	*Export all Condition:	App	roval Letter $\rightarrow$
		All	Prior to Approval	Prior to Funding	]		
Status ADDED	~						
				Acceptable File	Types: pdf, doc, docx, txt, til	ipg, jpeg, jpe, emf and	f xps   Note: Max 100M8
Prior to 🗢	Conditions 0		Expand details	Open/Revised	Received ©	Status 🗘	Attach Docs

Column Heading	Purpose			
Prior to	This describes the category of the condition.			
Conditions	This is the name of the condition; the numerical portion is for internal use only.			
Open/Revised	This is the date the condition was opened and/or revised by the Underwriter.			
Received	This is the date the documents were received for review.			
Status	This is the current status of the condition.			
Attach Docs	Docs This enables the user to upload documents supporting the condition.			
View Docs	This displays documents uploaded.			
More	ore This displays details of the condition, including Underwriter comments, if any			

# 4. Uploading Document to Clear Conditions

It is a best practice and recommended to upload one document at a time to clear one condition and click Submit on the bottom-right of the page before moving to another condition. This allows for quicker service to review and clear conditions.

1. Find the condition you want to clear.

Note: Select ADDED or OPEN from the Status drop-down list to view only open conditions.

Conditions		🚰 *Export all Conditions 🔿 🔯 Approval Letter
	All Prior to Approval	Prior to Funding
Sravus ADDED		
		restable File Turess and day, days, but, till just, just, just, and and start Name. Mar
400ED		ceptable File Types. pdf, duc, docs, tot, til, jug, jueg, jue, emf and spa   Notes Max

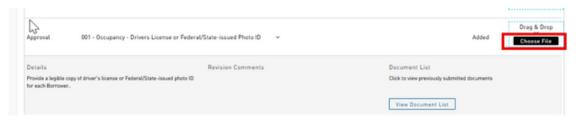


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The user may browse to upload a document using Choose File or use Drag & Drop to upload a file.

#### **Choose File**

#### 1. Click Choose File.



- 2. Navigate to the location of the document.
- 3. Select the document.

í D

Note: The document name populates in the File name: box.

4. Click **Open** to upload the document to the portal.

1 > This Pi	C → Deskt	top > LoanDocuments		v ð S	tarch LoanDocumen	ts	,P
rganize 🔻 New folder	6						?
E Pictures	<b>3</b>	Name	^	Date modifi	ed	Туре	e
Uploads	*	E Sample-Information.pdf		4/6/2021 12:	39 PM	Ado	be Ad
		Sample-Loan-Document	t.pdf	4/6/2021 12:	39 PM	Ado	be Ad
Desktop	~	<					
File name	Sample-	Information.pdf		~ 4	II Files (".")		~

5. Click **Submit** on the bottom-right of the page to upload



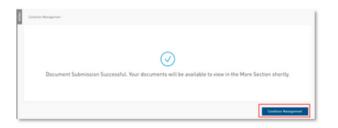


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#### **Choose File, continued**

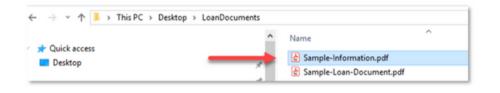
**Outcome:** A Document Submission Successful message displays

6. Click View/Upload Documents on the left nav bar



#### Drag & Drop

1. Navigate to the file to be uploaded for the condition.



2. Using your mouse, drag the highlighted file over the **Drag & Drop** box for the condition.

Funding	755 - Closing - Disbursement Ledger		Added	A T
Docs	613 - Credit-LDP / GSA Review - Dataverily		Added	P+ Copy
etaits		Revision Comments	Document List	
LS CM to include Evidence of I	Clear LDP and USA for all parties in transaction. Verify all parties a		Click to view previously submitted documents	
Read More			View Document List	

3. Click **Submit** to complete the submission of the document for review.

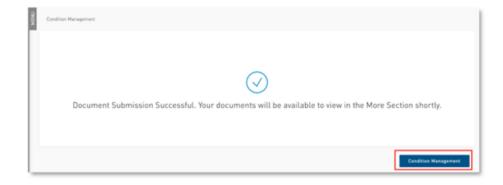


#### Drag & Drop, continued

Ô

Outcome: A Document Submission Successful message displays

4. Click Condition Management to return to the Conditions screen.





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