USER GUIDE

Conditions Management in Blueprint

Broker guide to uploading, submitting & managing loan conditions

Last updated: August 10, 2026

The Condition Panel is revolutionizing the way you submit documents for review. This user guide provides details on how to maximize the functionality within the panel.

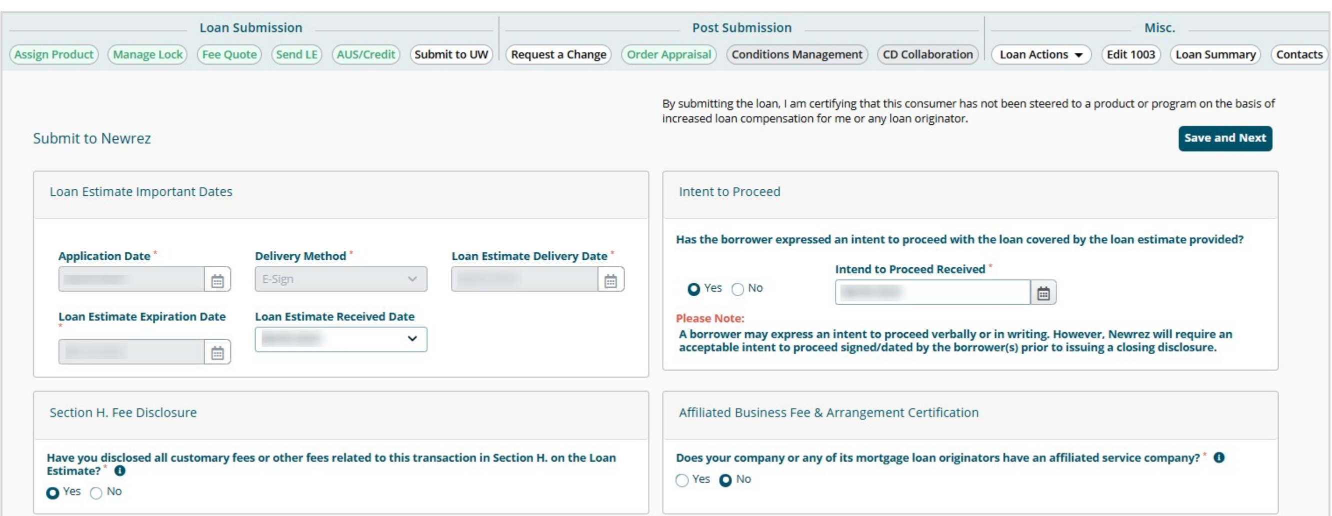
- **Enhanced broker experience**
- **Increased productivity**
- **Streamlined processes to boost efficiency**

IN THIS GUIDE

1 What is NOT changing

The Submit to UW screen stays the same

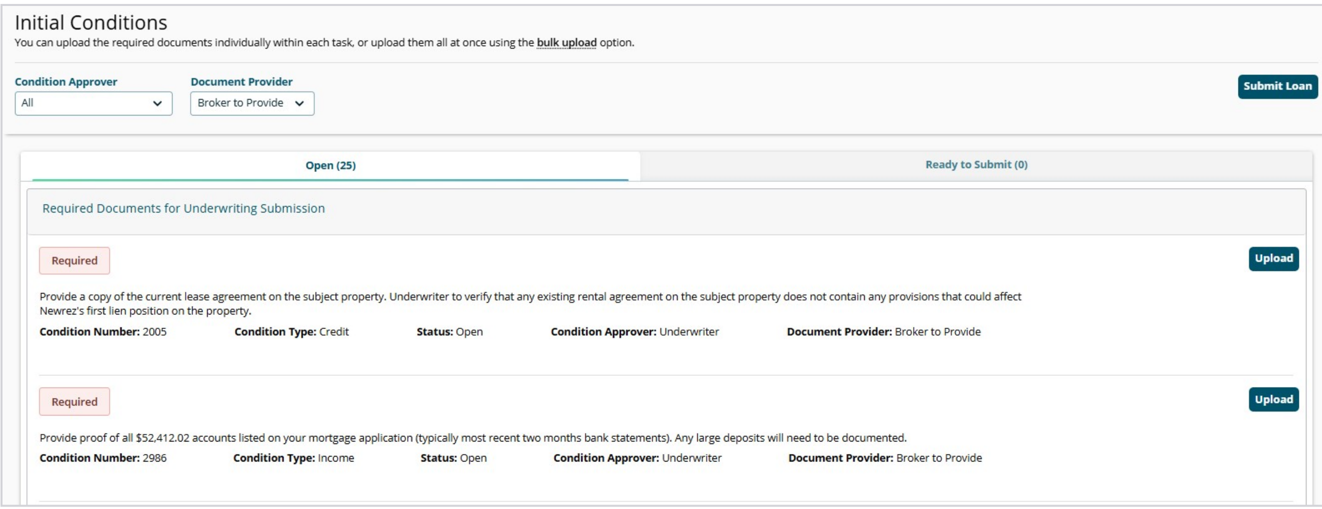
- Everything you know about entering borrower information, pricing, locking, and generating disclosures is staying the same.
- The **Submit to UW** screen is the same, except the Submission documents area has been removed.
- Once the Submit to UW screen is complete, clicking **Save and Next** pushes your view to the **Conditions Management** screen.

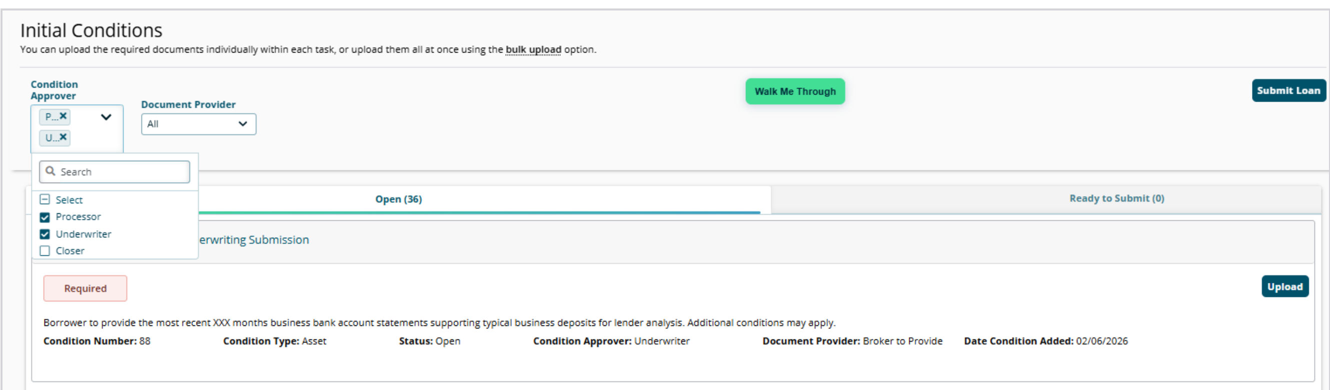


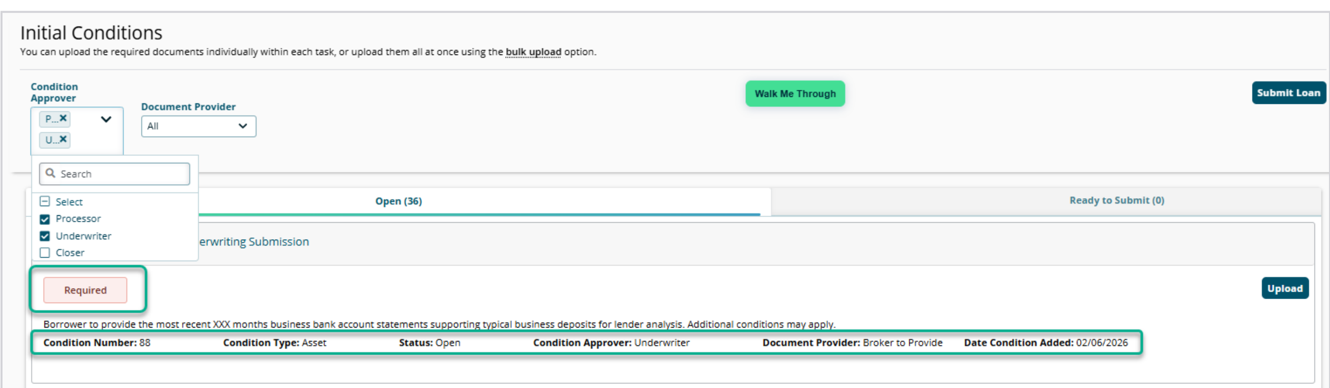
2 Loan Submission: Condition Management

Upload documents directly to conditions

- The **Condition Management** screen lets you upload documents directly to conditions, even before an initial approval from underwriting.
- Initial conditions are automatically generated based on AUS. If the product does not use AUS, conditions generate based on the product.
- Each condition shows **Condition Number, Condition Type, Status, Condition Approver,** and **Document Provider.** Conditions required for submission appear at the top, labeled **Required.**



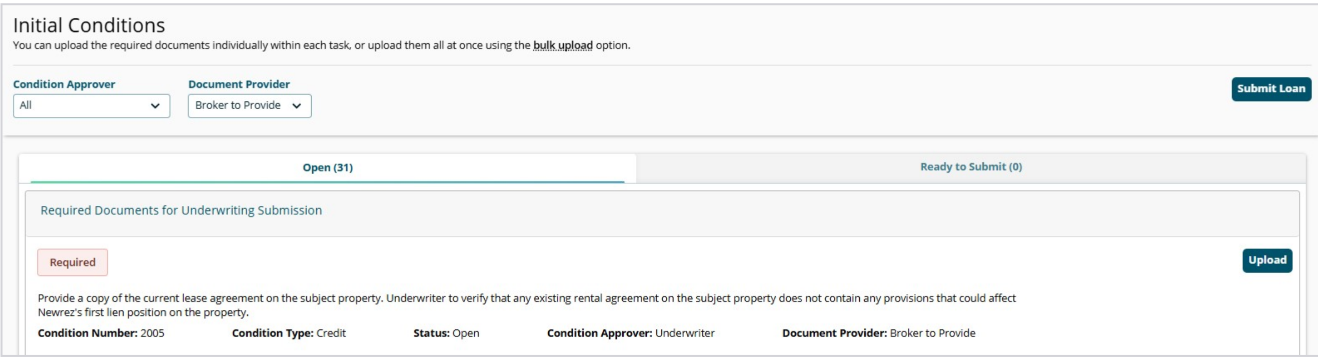




3 Filtering conditions

Filter by Condition Approver & Document Provider

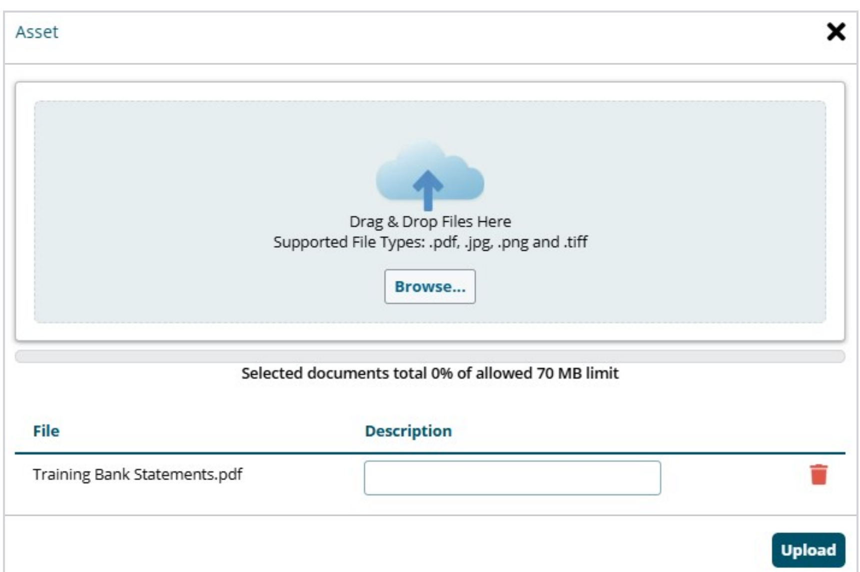
- Filter conditions using the dropdowns at the top of the panel.
- The default Condition Provider is **Processor (CRM)** and **Underwriter**; the default Document Provider is **ALL.**
- Select **Broker to Provide** to limit the view to conditions required by the broker.
- *Note: Additional documents can be uploaded at any time.*

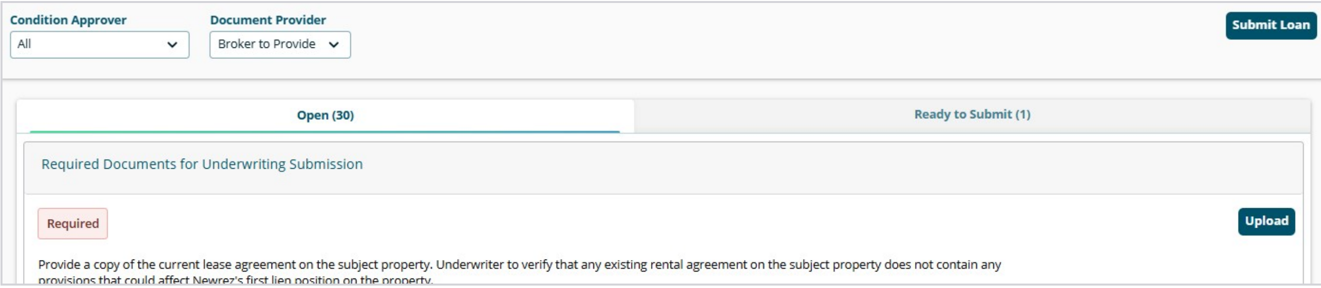


4 Uploading documents to conditions

Drag & drop or browse

- The **Conditions Management** screen shows which conditions are initially required for an underwriting decision and which are ready to submit to Newrez.
- Click **Upload** to add documents to a condition — by drag and drop or by browsing your computer. *Descriptions are optional.*
- Once uploaded, the condition moves to **Ready to Submit,** meaning documents uploaded successfully and will be reviewed after the loan is submitted to Newrez.

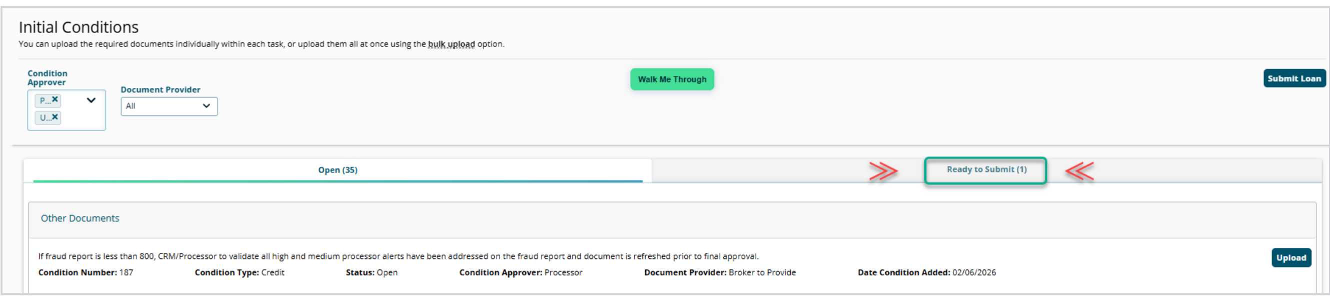


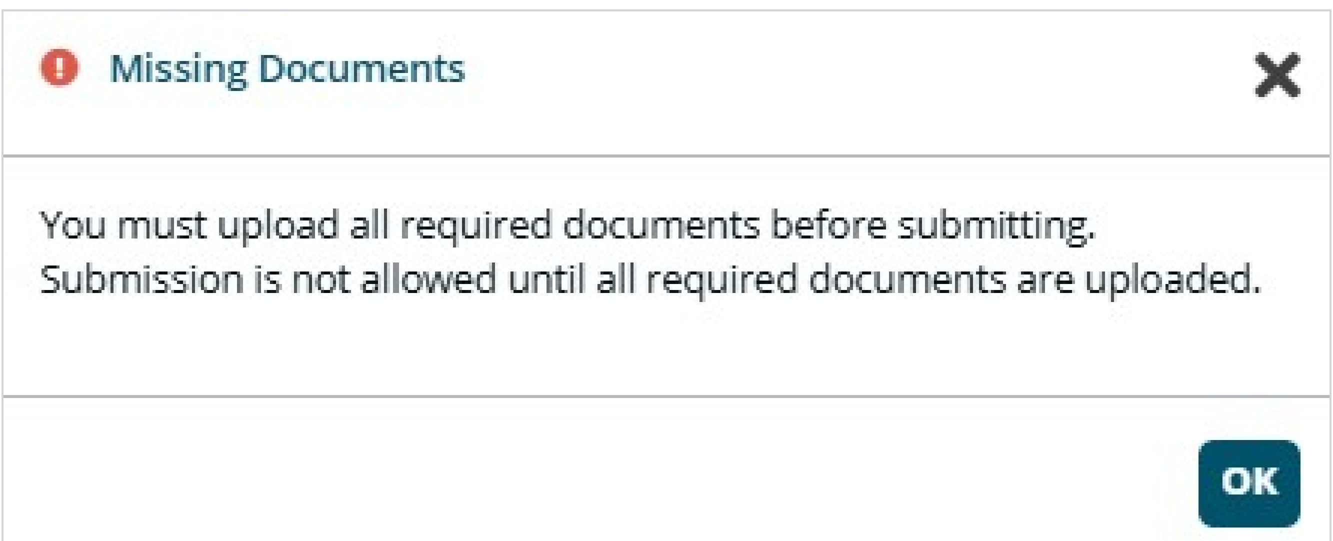


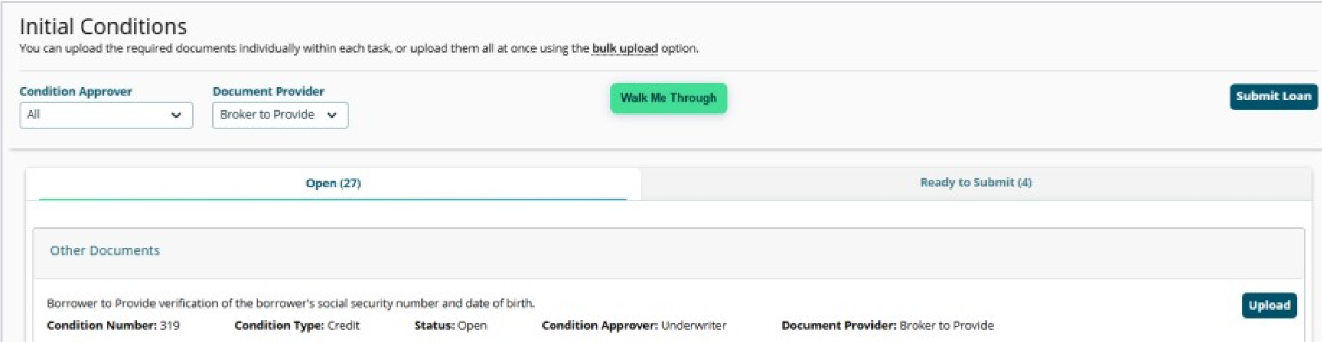
5 Submitting the loan to Newrez

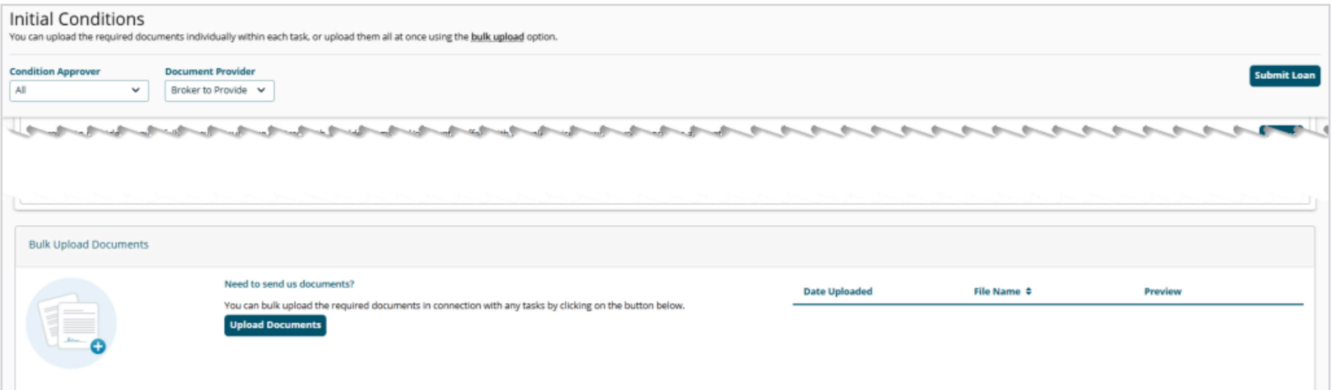
All required conditions need documents

- To submit a loan to Newrez, all required conditions must have attached documents. If not met, you'll be prompted to upload them before submission.
- Once all required conditions have documents attached, click **Submit Loan.**
- During initial submission, use **Bulk Upload** to upload multiple documents at once — you'll attest that all required conditions have been uploaded.





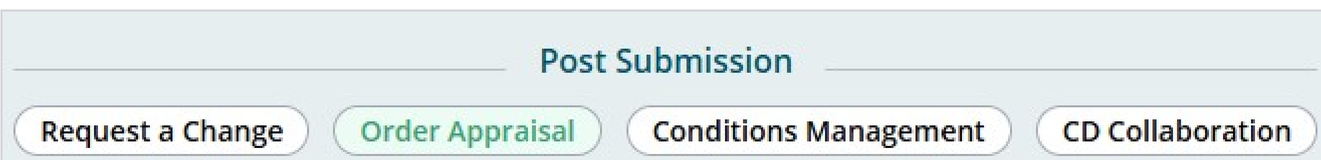


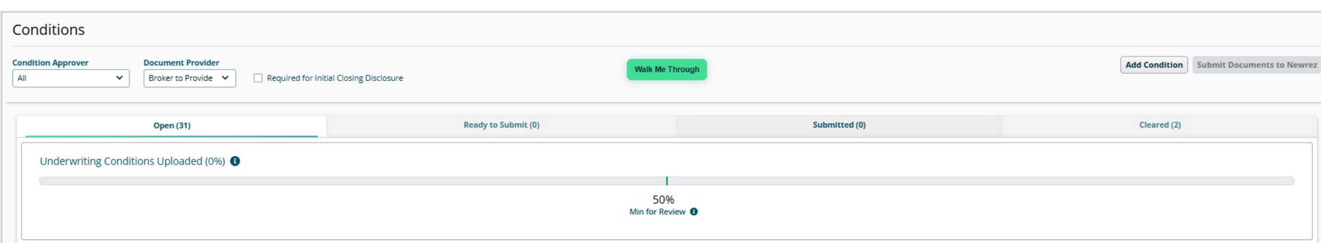


6 Post-submission: Conditions Management

Monitor open conditions from the status bar

- Once your loan is initially approved by Underwriting, the post-submission section of Blueprint shows a new status bar at the top of the screen.
- Monitor all open conditions on your loan. Use the drop-down menus to filter by who is responsible for clearing the condition and who is responsible for obtaining it.



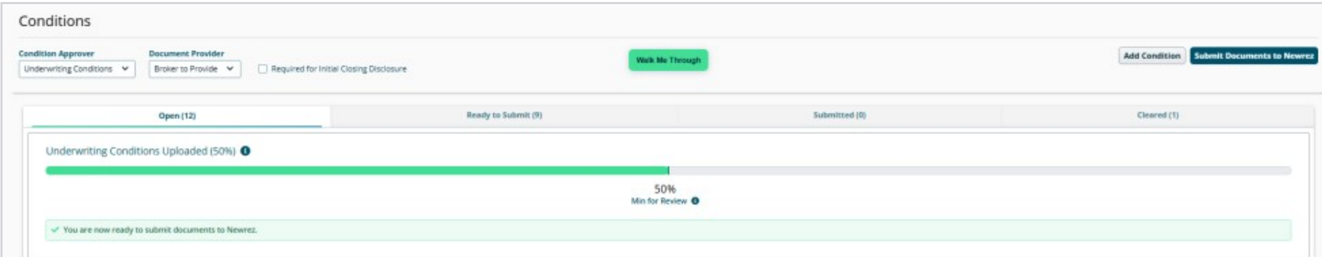


7 Re-submission to Underwriting

Reach the threshold to submit UW documents

- To submit loans back for additional underwriting, refer to the listed percentage — this threshold can be adjusted per brokerage by Newrez.

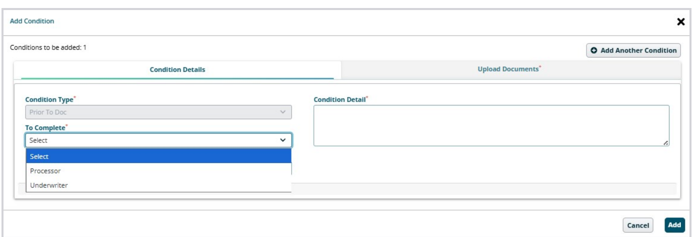
- As you upload broker-to-provide conditions the underwriter must clear, they move to **Ready to Submit,** the status bar adjusts, and at or above the threshold the bar turns green and the **Submit UW Documents to Newrez** button turns blue.
- *Note: Your underwriting conditions are NOT submitted to Newrez until you click Submit Documents to Newrez.*

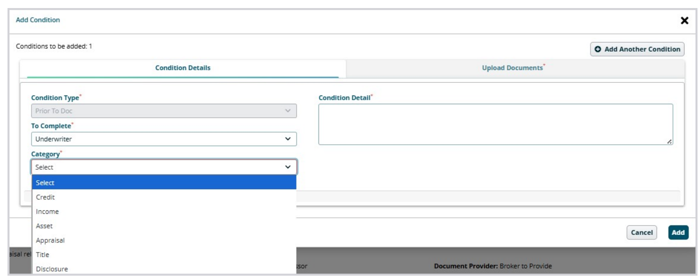


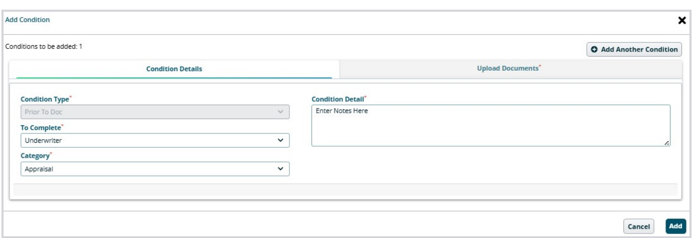
8 Adding a condition

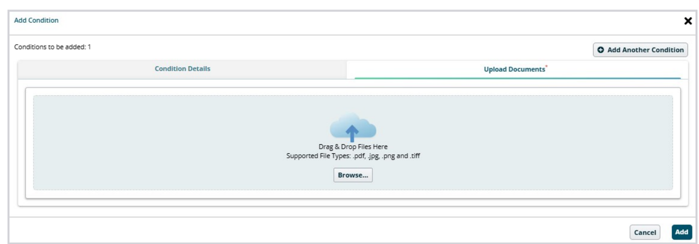
When you need to provide a document with no matching condition

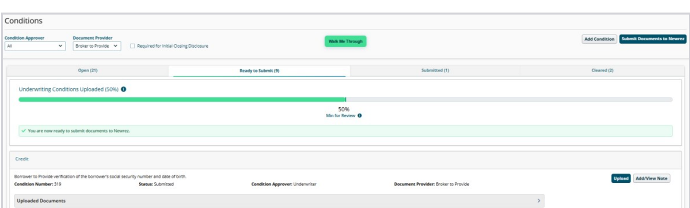
- Click **Add Condition,** then select who should review the documents (Underwriting or Processing).
- Select a category that applies (Credit, Income, Asset, Appraisal, Title, or Disclosures) and explain the document in the **Condition Detail.**
- Click **Upload Documents,** drag and drop or browse for images, then click **Add** to attach the condition and document to the file.









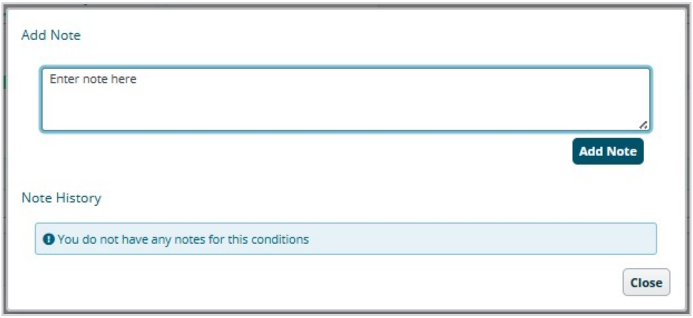


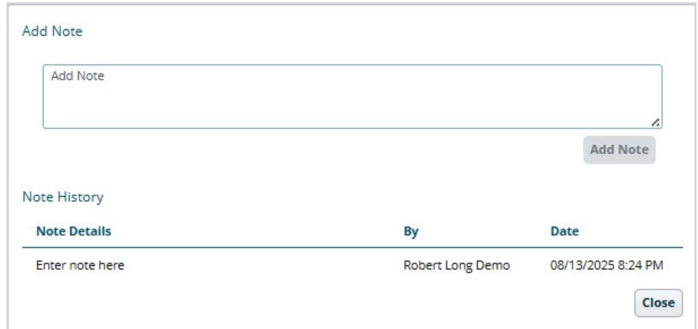
9 Adding notes & confirming

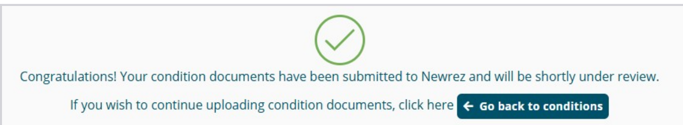
Add a note, then submit back to underwriting

- To add a note for the underwriter, click **Add/View Note,** enter your note in the note box, and click **Add Note.**
- Submitted notes appear in the **Note History** section.

- After you submit the loan back to underwriting, you'll receive a confirmation screen and the loan goes directly back into the underwriter's queue.



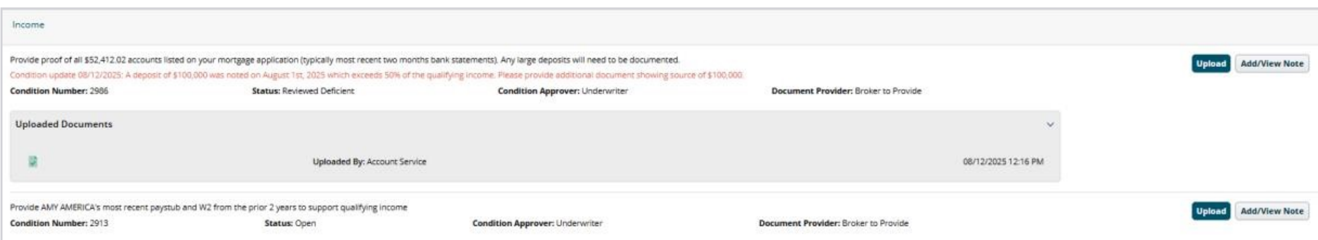




10 Re-submission to Processing

Processor conditions notify your CRM

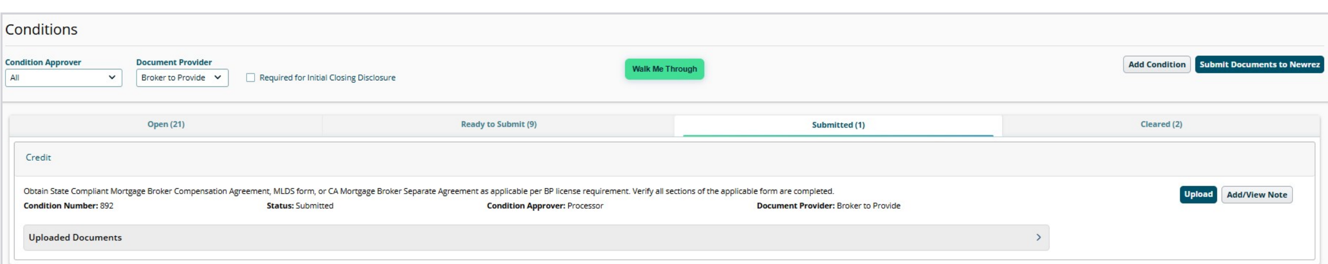
- If you upload a document to a **Processor** condition, that condition automatically moves to **Submitted** and your CRM is notified to review the documents.

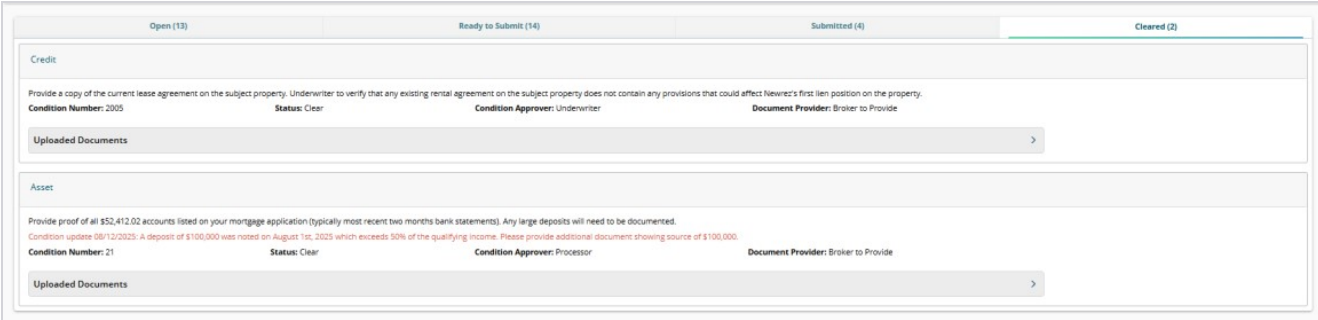


11 Post-approval submission review

Deficient vs. cleared conditions

- After your CRM or Underwriter reviews the documents, they follow standard communication practices. Deficient documents change the status to **Reviewed Deficient** and move the condition from **Review Queue** back to **Open,** with a note added.
- Use the documents drop-down to see exactly what was uploaded and why it was deficient; reach out to your underwriter or CRM with any questions.
- Once reviewed and cleared, conditions move to the **Cleared** section.





Please reach out to Brigade Support or your Account Executive for any questions.

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