

Client Readiness Training

Delegated Complete Loan Package Submission

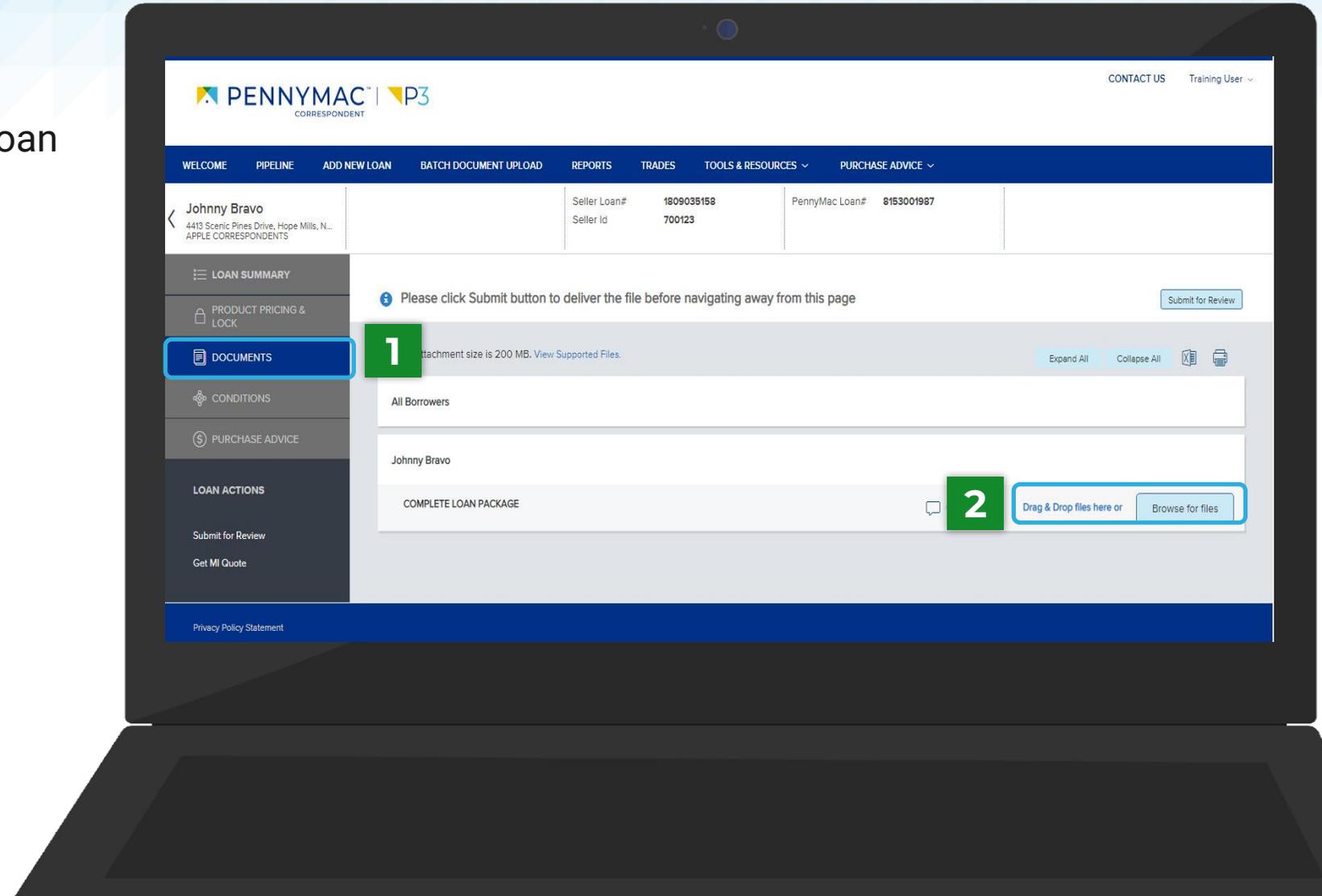
▶ Submitting the Complete Loan Package

Submitting the Complete Loan Package

Once a loan has been locked, the loan package can be submitted after uploading documentation.

- 1 After you display the loan required, go to the **Documents** section of the loan
- 2 Upload documents using the **Drag & Drop files** option or **Browse for files** for selecting files saved in the computer.

 Zip files are not supported in P3.

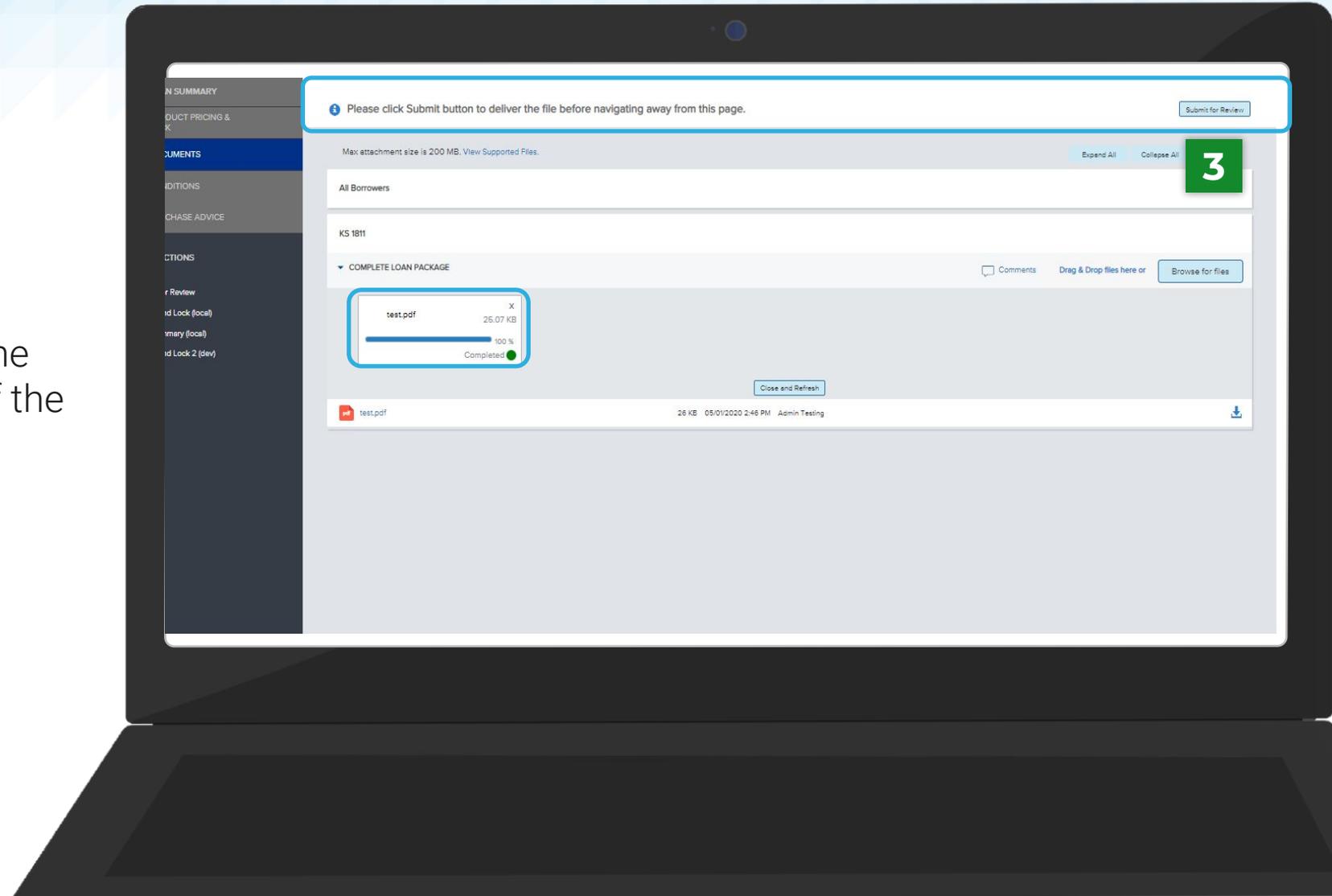


Submitting the Complete Loan Package

Once the upload is completed, the uploaded document appears as **Completed** in the screen.

A message asking you to submit the file for review appears at the top of the screen.

- 3 Click the **Submit for Review** button.



Submitting the Complete Loan Package

4

A submission confirmation window will pop up for the loan. Click **Continue** to confirm the loan submission.

The screenshot displays the Pennymac P3 Correspondent web application. At the top, the logo for PENNYMAC CORRESPONDENT | P3 is visible, along with navigation links for WELCOME, PIPELINE, ADD NEW LOAN, BATCH DOCUMENT UPLOAD, and REPORTS. A user profile for 'Training User' is shown in the top right corner. A confirmation dialog box is centered on the screen, asking 'Are you sure you want to submit this loan at this time?' with 'Cancel' and 'Continue' buttons. The 'Continue' button is highlighted with a blue border. A green square with the number '4' is positioned to the right of the dialog box. Below the dialog box, the main content area shows a 'Submit for Review' section with a 'Submission Overview' table. The table has columns for Application Date, Submission Status, Initial Submittal Date, and Last Submittal Date. The current status is 'Not Submitted'. A sidebar on the left contains navigation options: LOAN SUMMARY, PRODUCT PRICING & LOCK, DOCUMENTS, CONDITIONS, PURCHASE ADVICE, and LOAN ACTIONS (Submit for Review, Get MI Quote).

Application Date	Submission Status	Initial Submittal Date	Last Submittal Date
-	Not Submitted	-	-

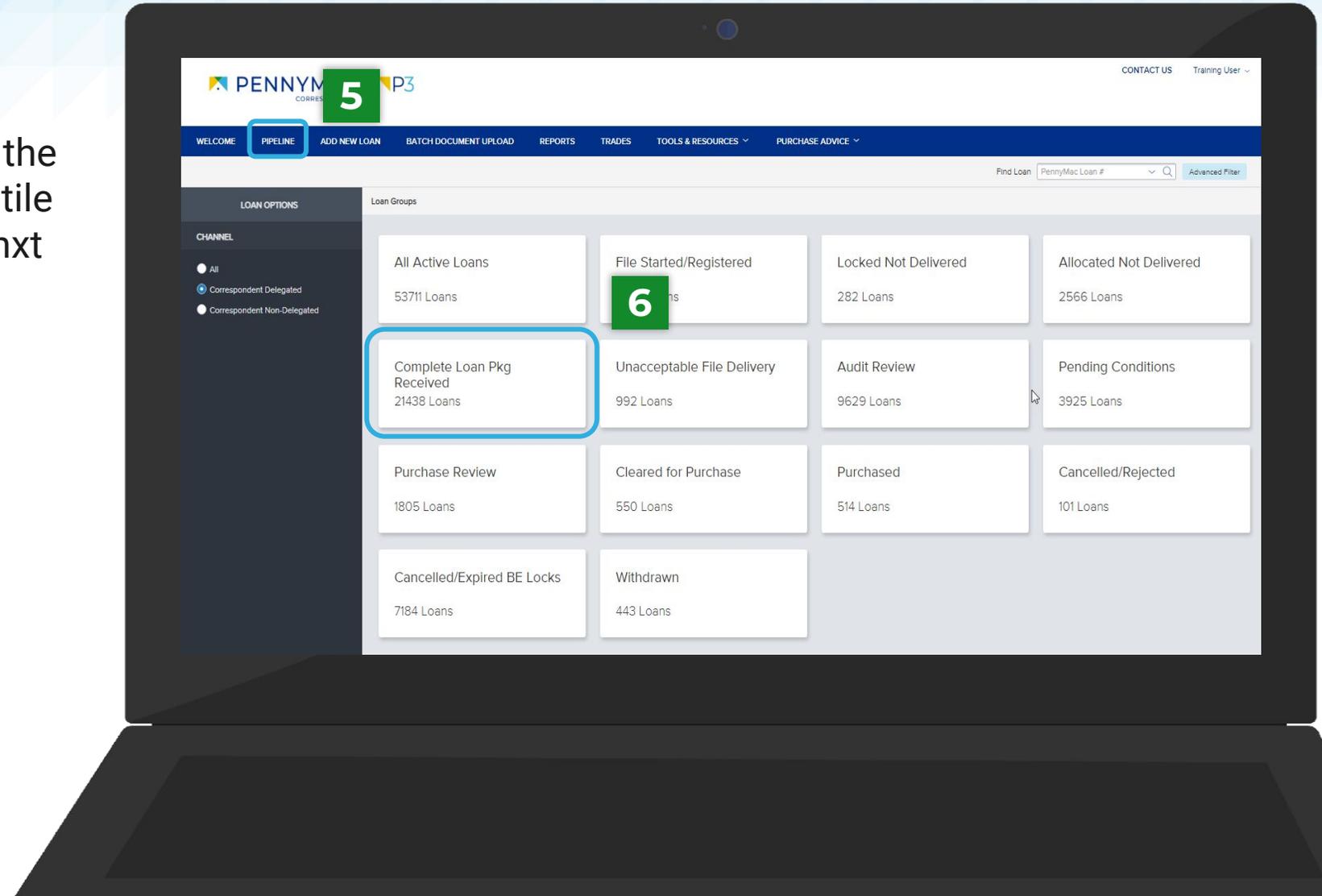
Submitting the Complete Loan Package

The loan should now be located in the Complete Loan Package Received tile in the Pipeline screen. Follow the next steps to check this:

5 Go to the *PIPELINE* tab.

6 Click the *Complete Loan Package Received* tile..

i If the complete loan package is not submitted, it will stay in the Locked Not Delivered tile for Best Effort loans or the Allocated Not Delivered tile for Mandatory loans.



Submitting the Complete Loan Package

7 Find the loan in the pipeline list.

i The search bar in the top header can be used to search loans by their number.

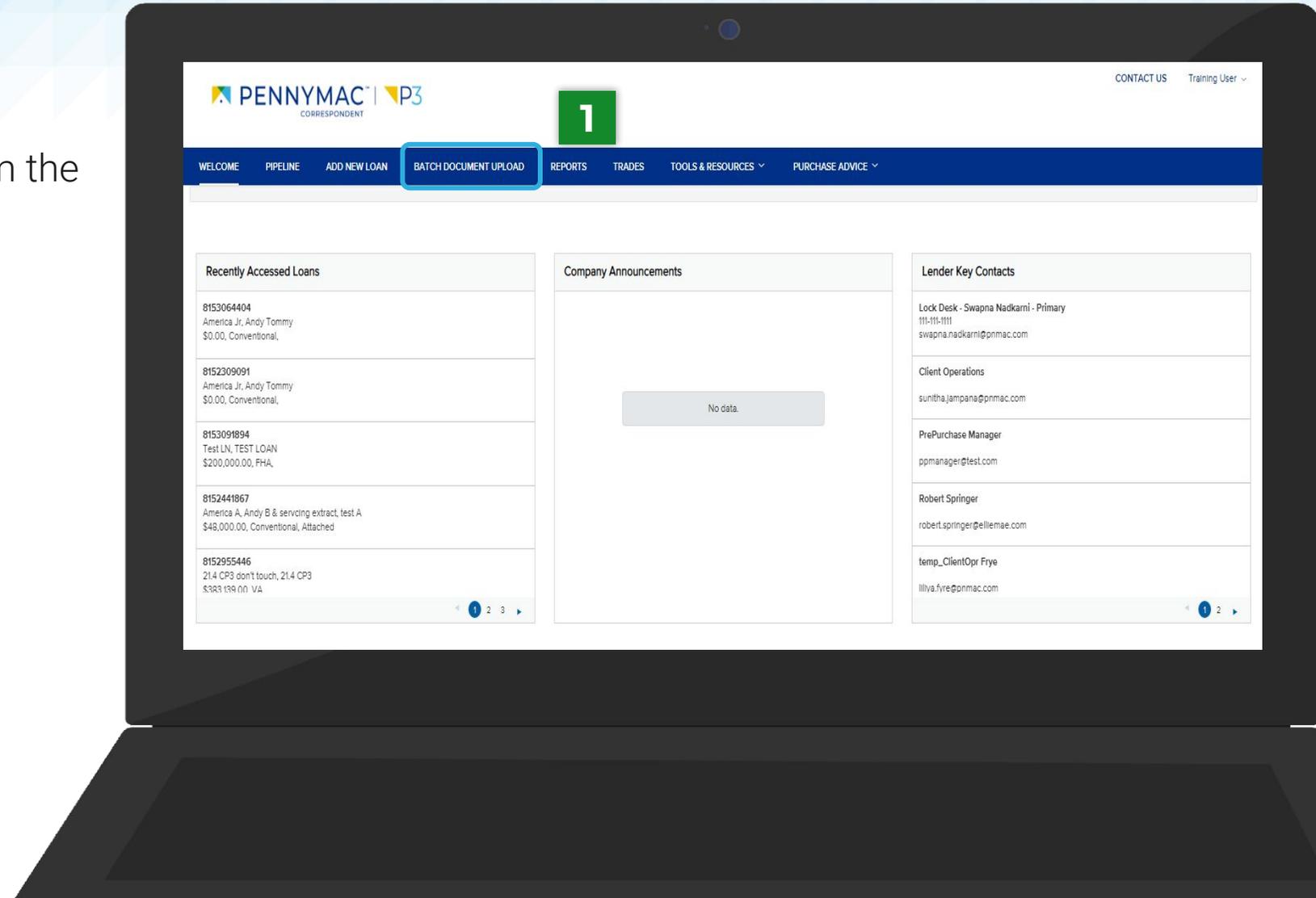
The screenshot displays the PENNYMAC CORRESPONDENT P3 interface. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE ADVICE'. A search bar is located in the top right of the header, with the text 'Find Loan | PennyMac Loan #' and a search icon. Below the navigation bar, there is a 'Loan Group' dropdown menu set to 'Complete Loan Pkg Rec...'. The main content area is a table with columns: PennyMac Loan #, Seller Loan #, Borrower Last Name, Property State, Current Status, Loan Type, Loan Amount, Note Rate, Loan Program, and Comm. The table contains several rows of loan data. A red box highlights the search bar in the top header. A green box with the number '7' highlights the row for loan number 8152293991. The table data is as follows:

PennyMac Loan #	Seller Loan #	Borrower Last Name	Property State	Current Status	Loan Type	Loan Amount	Note Rate	Loan Program	Comm
8151653591			FL	Complete Loan Package File Delivery	FHA	300,000.00	4.750	Conf 21-30 Fixed	03/2
8152296892			AL	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	07/1
8151494509			TN	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	02/1
8151459358			CA	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	02/1
8152293991			CA	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	07/1
8152294016			CA	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	07/1
8151459740			CA	Complete Loan Package File Delivery	Conventional	300,000.00	4.750	Conf 21-30 Fixed	02/1
8151599441			FL	Complete Loan Package File Delivery	VA	300,000.00	4.750	Conf 21-30 Fixed	03/1
8151494119			FL	Complete Loan Package File Delivery	FHA	300,000.00	4.750	Conf 21-30 Fixed	02/1
8151390343			CA	Complete Loan	Conventional	300,000.00	4.750	Conf 21-30 Fixed	01/2

Submitting the Complete Loan Package

Let's review another way to perform the Complete Loan Package upload process:

1 Go to the *Batch Document Upload* tab.



Submitting the Complete Loan Package

2 Click on the arrow at the left of the loan line.

3 Click the Browse LOCAL DRIVE button in the Complete Loan Package folder and select a file from the computer..

i The Drag and Drop option is also available to upload documents. The file will appear with a green checkbox when completed.

i The packages for multiple loans can be completed by repeating these steps for different loans.

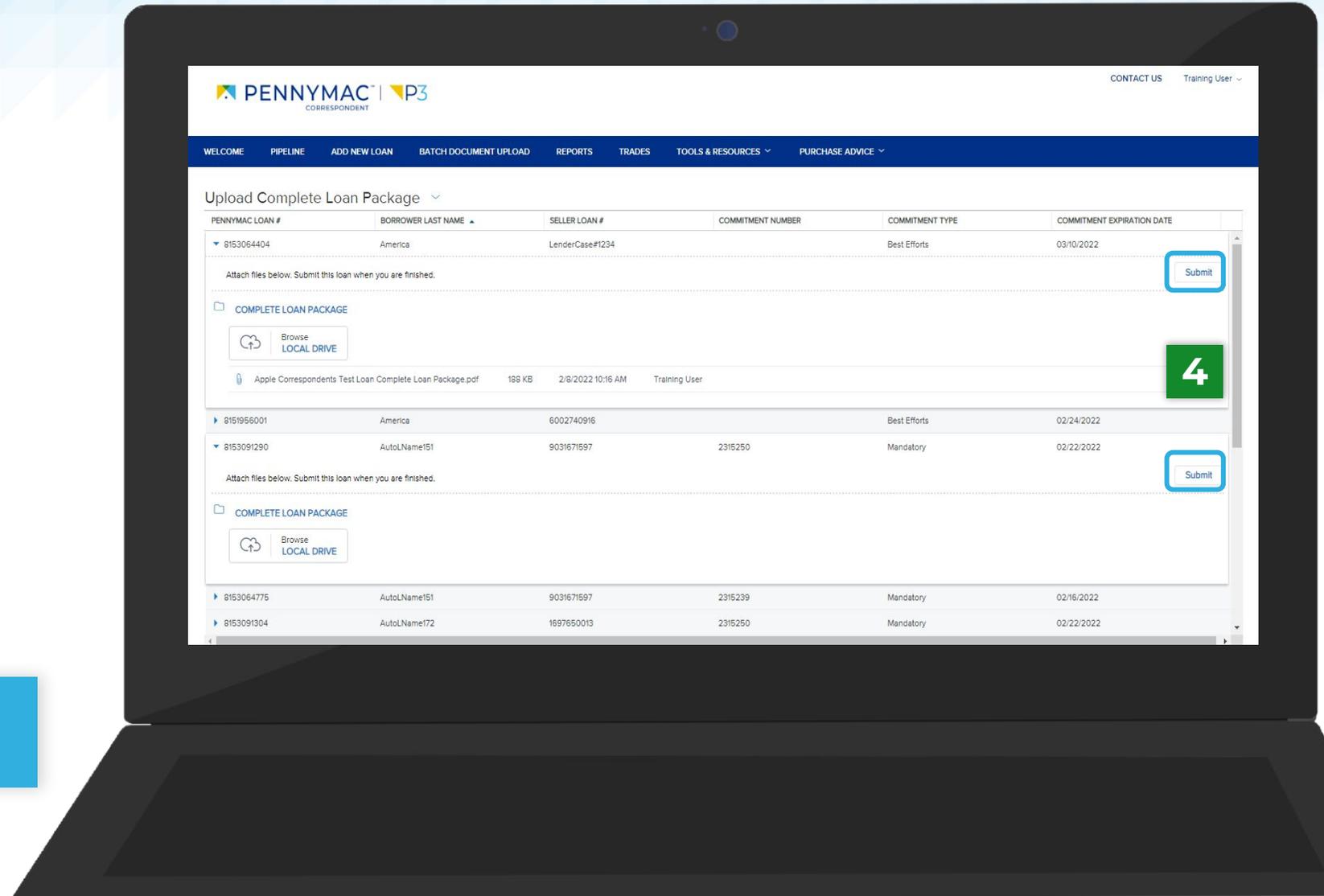
The screenshot displays the PENNYMAC CORRESPONDENT P3 interface. At the top, there is a navigation bar with options like WELCOME, PIPELINE, ADD NEW LOAN, BATCH DOCUMENT UPLOAD, REPORTS, TRADES, TOOLS & RESOURCES, and PURCHASE ADVICE. The main content area is titled 'Upload Complete Loan Package'. It features a table with columns: PENNYMAC LOAN #, BORROWER LAST NAME, SELLER LOAN #, COMMITMENT NUMBER, COMMITMENT TYPE, and COMMITMENT EXPIRATION DATE. Below the table, there are sections for each loan, including a 'COMPLETE LOAN PACKAGE' folder and a 'Browse LOCAL DRIVE' button. A green box with the number '2' highlights the expand/collapse arrow on the left of a loan row. Another green box with the number '3' highlights the 'Browse LOCAL DRIVE' button within the 'COMPLETE LOAN PACKAGE' folder for the same loan. A blue box highlights a checkbox next to a file name 'pendents Test Loan Complete Loan Package.pdf'.

Submitting the Complete Loan Package

4 A submission confirmation window will pop up for the loan. Click **Continue** to confirm the loan submission.

With this last step the Uploading Loan package is completed!

+ A green notification will pop-up to confirm the loan has been submitted.



**THANK
YOU!**

