

Client Readiness Training

Completing Post Funding Actions

Content

On this module, we will go over the following topics:

1 Single post funding requests

Learn how to create single post funding requests.

2 Bulk post funding requests

Learn how to create bulk post funding requests.

3 Post funding request additional information

Understand how to add additional information to post funding requests.



MODULE DURATION
15 MINUTES

Scenario: Completing Post Funding Actions

Charlie notices that his loan was not purchased for the correct price so he wants to submit a price adjustment.

Let's see how Charlie can complete this task.

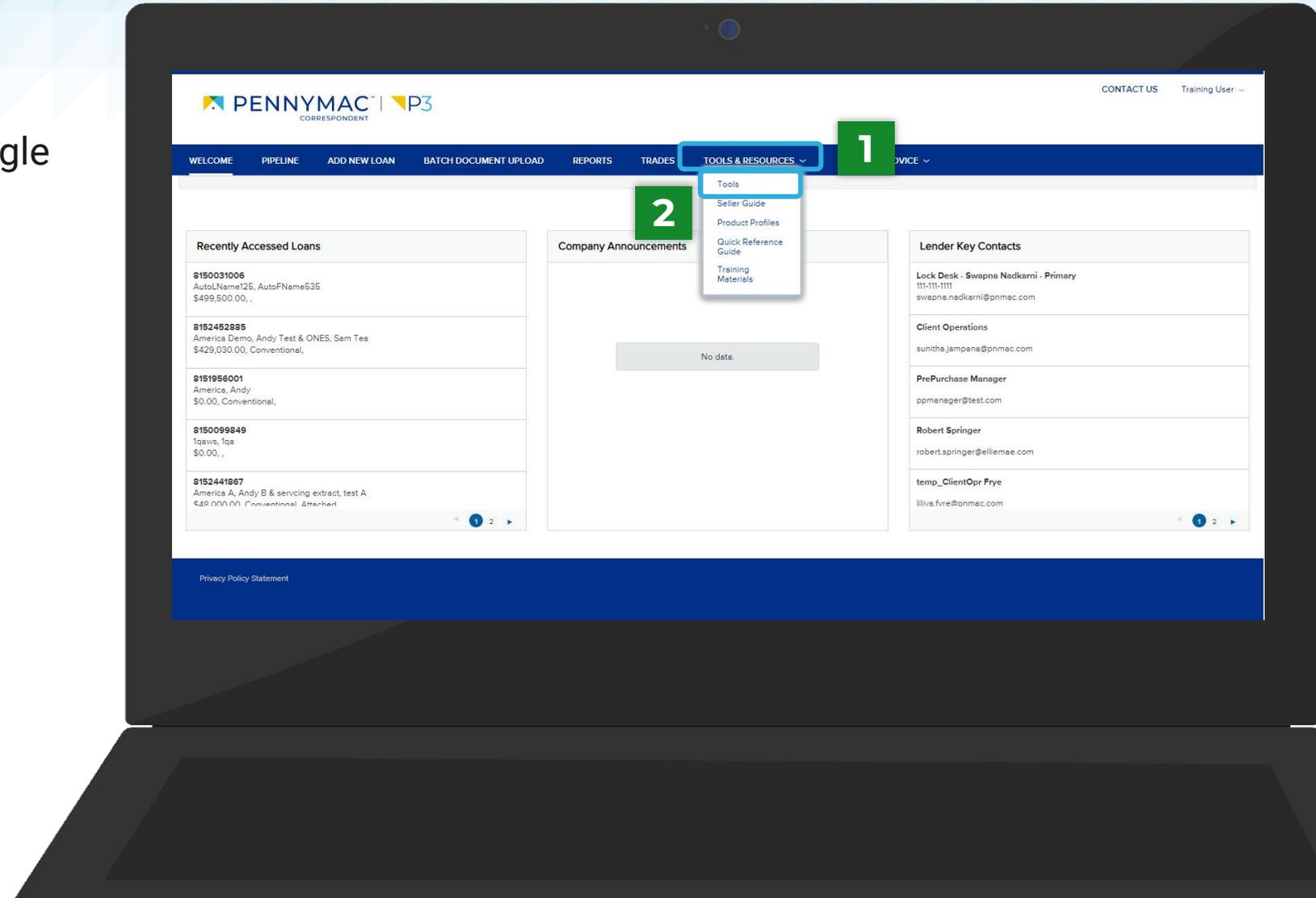


Single Post Funding Requests

Single Post Funding Requests

Follow the next steps to create single post funding requests:

- 1** After logging into P3, go to the **Tools & Resources** tab.
- 2** Once the drop-down menu displays, click on the **Tools** button.

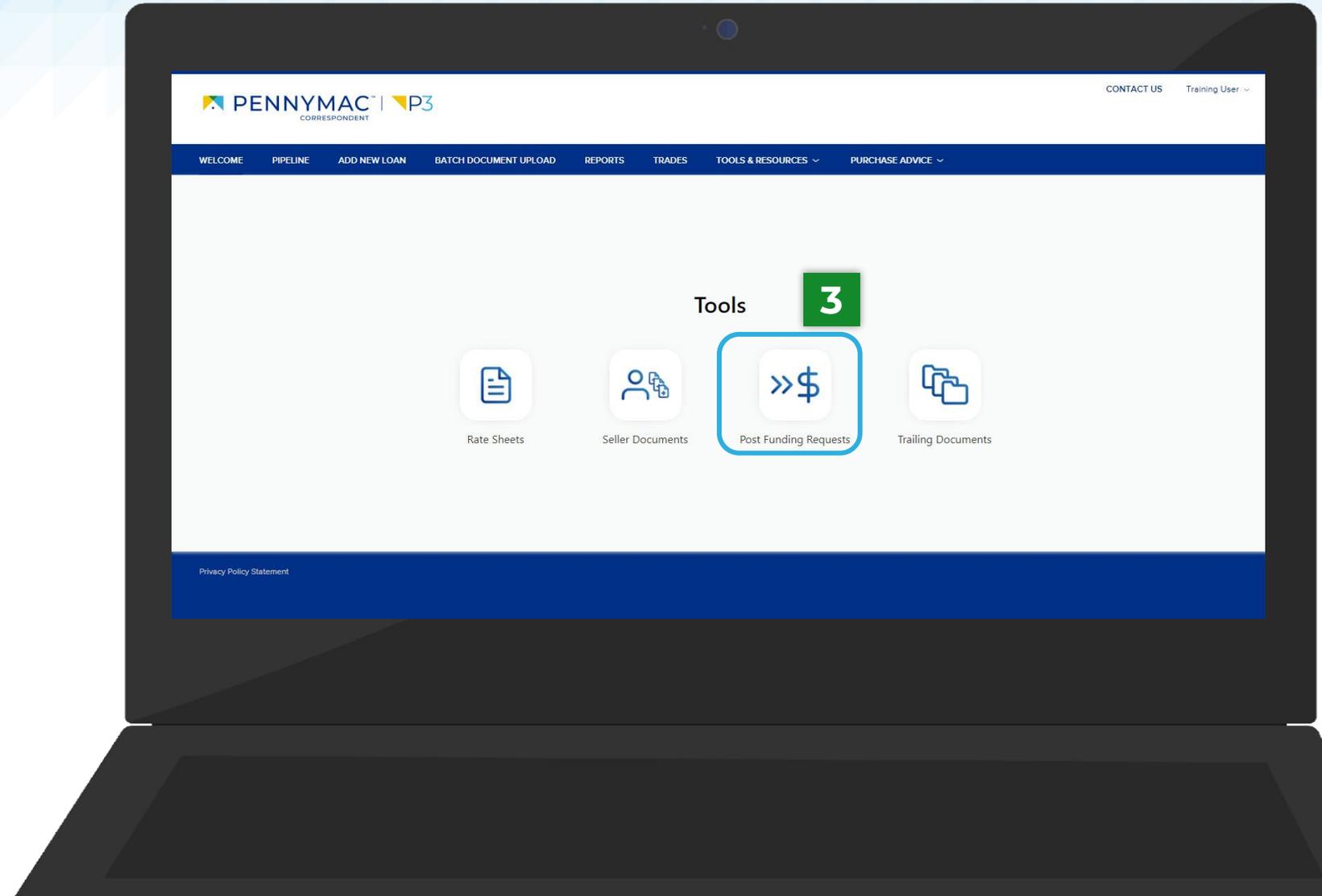


Single Post Funding Requests

3 Click the **Post Funding Requests** icon.

i When entering for the first time, an authentication code will be received by email. That code must be entered to access this section.

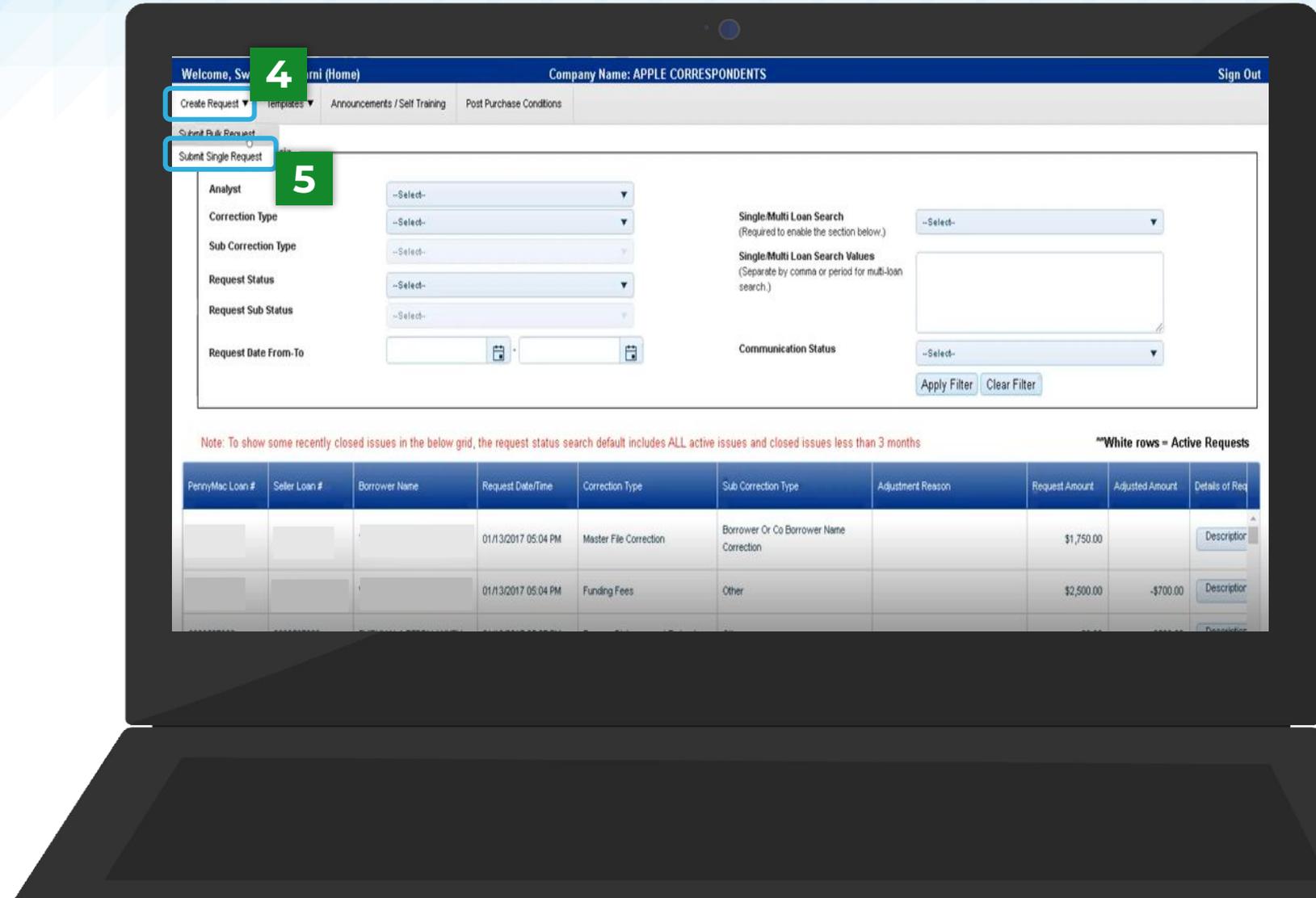
i Users will only see applications they have been granted access to by their administrators via their user personas.



Single Post Funding Requests

4 Click the **Create Request** button.

5 Once the drop-down menu displays, click the **Submit Single Request** button.



Single Post Funding Requests

6 Complete the required information:

- Contact Phone Number
- Primary Email
- Mailing Address
- City
- State
- Zip Code
- PennyMac Loan #
- Correction Type
- Request Amount
- Details of requests
- Sub correction type

The screenshot shows a web application interface for creating a single post-funding request. The user is logged in as Swapna Nadkarni (Home) for the company APPLE CORRESPONDENTS. The page title is "Single Request".

Requestor Info

Requestor:
Contact Phone #:
Primary Email:
Secondary Email:
Mailing Address 1:
Mailing Address 2:
City:
State: Zip:

Note: If reimbursement check needs to be remitted to different address than above, please edit above address.

Request Details

PennyMac Loan #:
Correction Type:
Request Amount \$:
Details of Request:
Seller Loan #:
Sub Correction Type:
Seller:

[Upload PDF\(s\)](#)
of PDF(s) Uploaded:

Note: Upload PDF(s) link will be enabled on successful creation of request on clicking Upload Request button.

Single Post Funding Requests

7 Click the **Upload Request** button.



A green message will notify that the request has been successfully created



After uploading the request, supporting PDF documentation can be uploaded via the Upload PDF(s) link.

Single Post Funding Requests

Any created requests can be seen in the table at the bottom of the **Post Funding Requests** main page.



The search criteria section above the requests table will be helpful when looking for specific requests.

Requestor information can be found by clicking the **Details** in the Requester Details column.

Welcome, Swapna Nadkarni (Home) Company Name: APPLE CORRESPONDENTS Sign Out

Create Request ▼ Templates ▼ Announcements / Self Training Post Purchase Conditions

Search Criteria

Analyst --Select--

Correction Type --Select--

Sub Correction Type --Select--

Request Status --Select--

Request Sub Status --Select--

Request Date From-To

Single/Multi Loan Search (Required to enable the section below.) --Select--

Single/Multi Loan Search Values (Separate by comma or period for multi-loan search.)

Communication Status --Select--

Apply Filter Clear Filter

Query result total = 697

Note: To show some recently closed issues in the below grid, the request status search default includes ALL active issues and closed issues less than 3 months

White rows = Active Requests

PennyMac Loan #	Seller Loan #	Borrower Name	Request Date/Time	Correction Type	Sub Correction Type	Adjustment Reason	Request Amount	Adjusted Amount	Details of Request
			01/13/2017 05:04 PM	PCG Servicing Inquiry	Property Inspection Waiver Fee		\$1,500.00		Descriptor
			01/16/2017 03:10 AM	Borrower Payment Recovery	Borrower Payment due to Seller		\$777.00		Descriptor

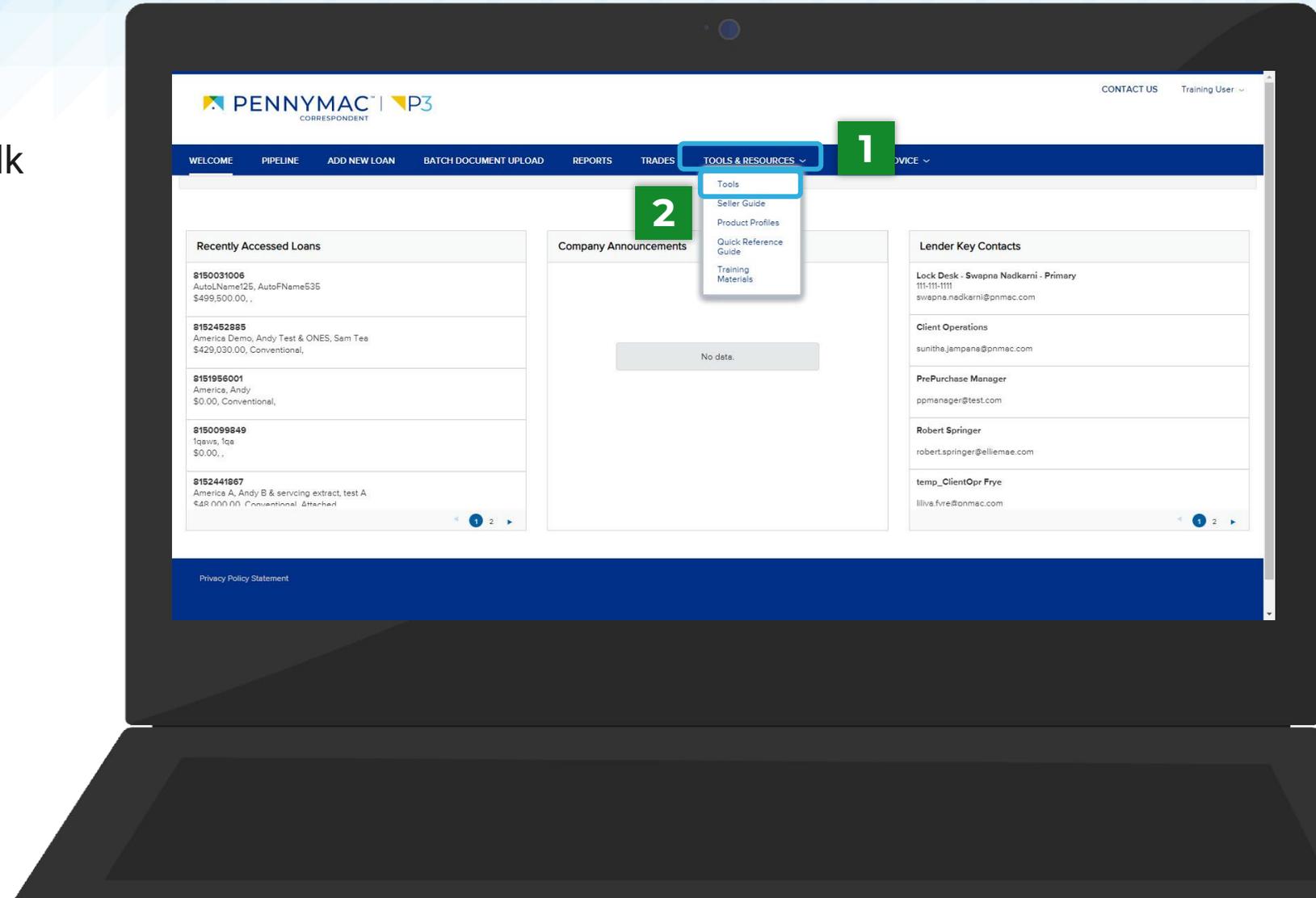
▼ Bulk Post Funding Requests

Bulk Post Funding Requests

Follow the next steps to create bulk post funding requests:

1 Go to the **Tools & Resources** tab.

2 Once the drop-down menu displays, click on the **Tools** button.

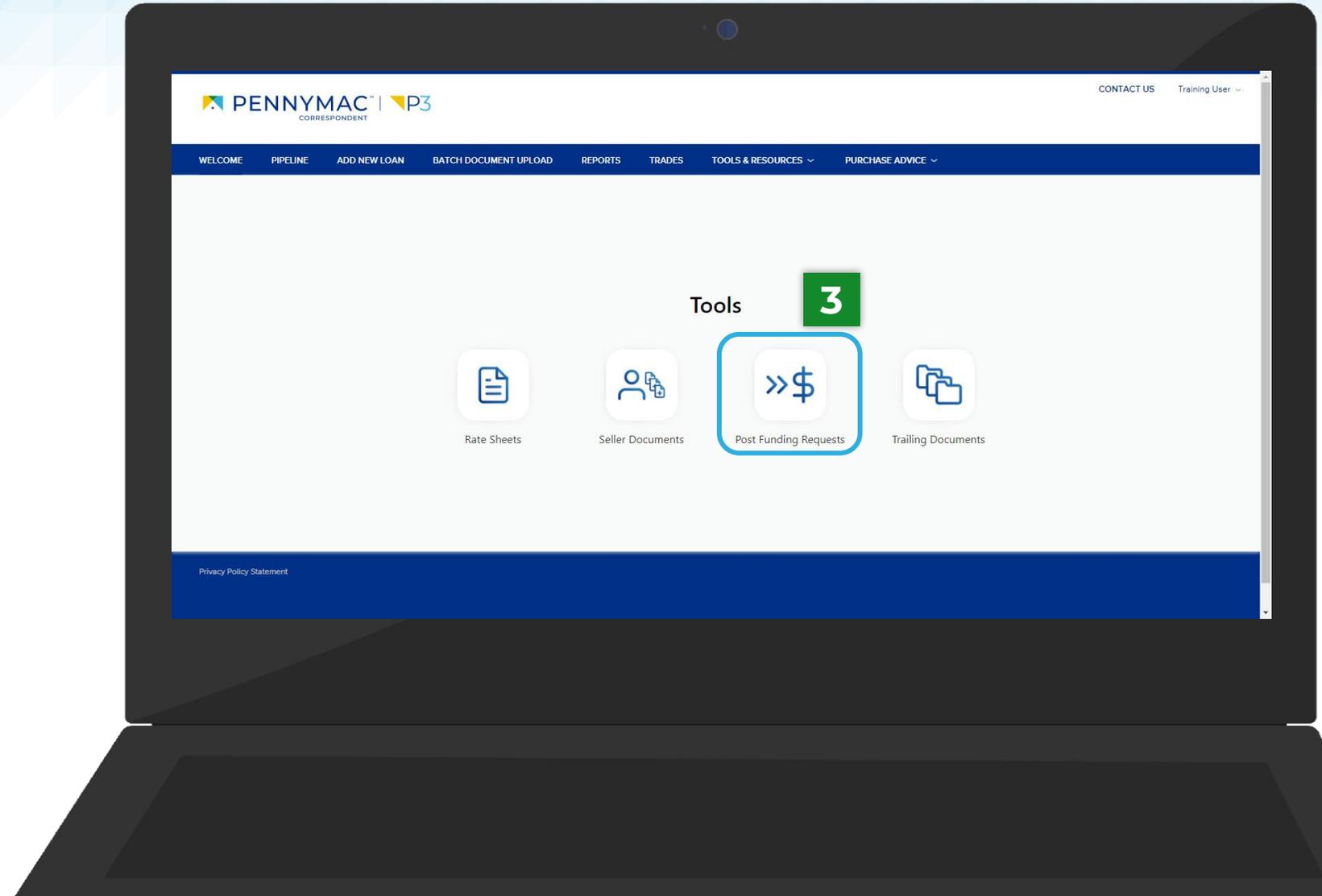


Bulk Post Funding Requests

3 Click the **Post Funding Requests** icon.

i When entering for the first time, an authentication code will be received by email. That code must be entered to access this section.

i Users will only see applications they have been granted access to by their administrators via their user personas.



Bulk Post Funding Requests

4 Click the **Create Request** button.

5 Once the drop-down menu displays, click the **Submit Bulk Request** button.

4

5

Welcome, Swapn (Home) Company Name: APPLE CORRESPONDENTS Sign Out

Create Request Templates Announcements / Self Training Post Purchase Conditions

Submit Bulk Request

Submit Single Request

Analyst --Select-

Correction Type --Select-

Sub Correction Type --Select-

Request Status --Select-

Request Sub Status --Select-

Request Date From-To

Single/Multi Loan Search (Required to enable the section below.) --Select-

Single/Multi Loan Search Values (Separate by comma or period for multi-loan search.)

Communication Status --Select-

Apply Filter Clear Filter

Note: To show some recently closed issues in the below grid, the request status search default includes ALL active issues and closed issues less than 3 months

White rows = Active Requests

PennyMac Loan #	Seller Loan #	Borrower Name	Request Date/Time	Correction Type	Sub Correction Type	Adjustment Reason	Request Amount	Adjusted Amount	Details of Req
			01/13/2017 05:04 PM	Master File Correction	Borrower Or Co Borrower Name Correction		\$1,750.00		Description
			01/13/2017 05:04 PM	Funding Fees	Other		\$2,500.00	-\$700.00	Description

Bulk Post Funding Requests

6 Complete the required information:

- Contact Phone Number
- Primary Email
- Mailing Address
- City
- State
- Zip Code

7 Click the **Attach Request Spreadsheet** button to upload a completed Bulk Post Funding spreadsheet.

i Request spreadsheet can be found under the **Template** tab.

The screenshot shows a web application interface for a user named 'rapna Nadkarni (Home)' with the company name 'APPLE CORRESPONDENTS'. The page title is 'Bulk Request'. The form is divided into sections for 'Requestor Info' and 'Mailing Address'. The 'Requestor Info' section includes fields for 'Requestor', 'Contact Phone #', 'Primary Email', and 'Secondary Email'. The 'Mailing Address' section includes fields for 'Mailing Address 1', 'Mailing Address 2', 'City', 'State', and 'Zip'. A red note below the form states: 'Note: If reimbursement check needs to be remitted to different address than above, please edit above address.' At the bottom right of the form, there is a button labeled 'Attach Request Spreadsheet'. Below the form is a table with columns: 'PennyMac Loan #', 'Seller Loan #', 'Correction Type', 'Sub Correction Type', 'Request Amount', and 'Details of Request'. A green box with the number '7' is overlaid on the 'Details of Request' column header.

Bulk Post Funding Requests

8 Click the **Upload Request** button

With these steps the creation of the request has been completed!

The screenshot shows a web application interface for creating a bulk request. At the top, there is a navigation bar with the user's name 'Welcome, Swapna Nadkarni (Home)', the company name 'APPLE CORRESPONDENTS', and a 'Sign Out' link. Below the navigation bar, there are several menu items: 'Create Request', 'Templates', 'Announcements / Self Training', and 'Post Purchase Conditions'. The main content area is titled 'Bulk Request' and contains a form with the following fields:

- Requestor Info:**
 - Requestor: (empty)
 - Contact Phone #: (805) 304-6624
 - Primary Email: sudip.swapna@gmail.com
 - Secondary Email: (empty)
- Mailing Address 1:** 6949 Blue Ridge Way
- Mailing Address 2:** (empty)
- City:** Moorpark
- State:** CA
- Zip:** 93021

Below the form, there is a red error message: 'Error(s) - Requestor Name is required'. A note below the error message reads: 'Note: If reimbursement check needs to be remitted to different address than above, please edit above address.' At the bottom of the form, there are two buttons: 'Upload Request' and 'Attach Request Spreadsheet'. The 'Upload Request' button is highlighted with a green box and the number '8'. Below the form, there is a table with the following columns: 'PennyMac Loan #', 'Seller Loan #', 'Correction Type', 'Sub Correction Type', 'Request Amount', and 'Details of Request'.

▼ Post Funding Requests Additional Information

Post Funding Requests Additional Information

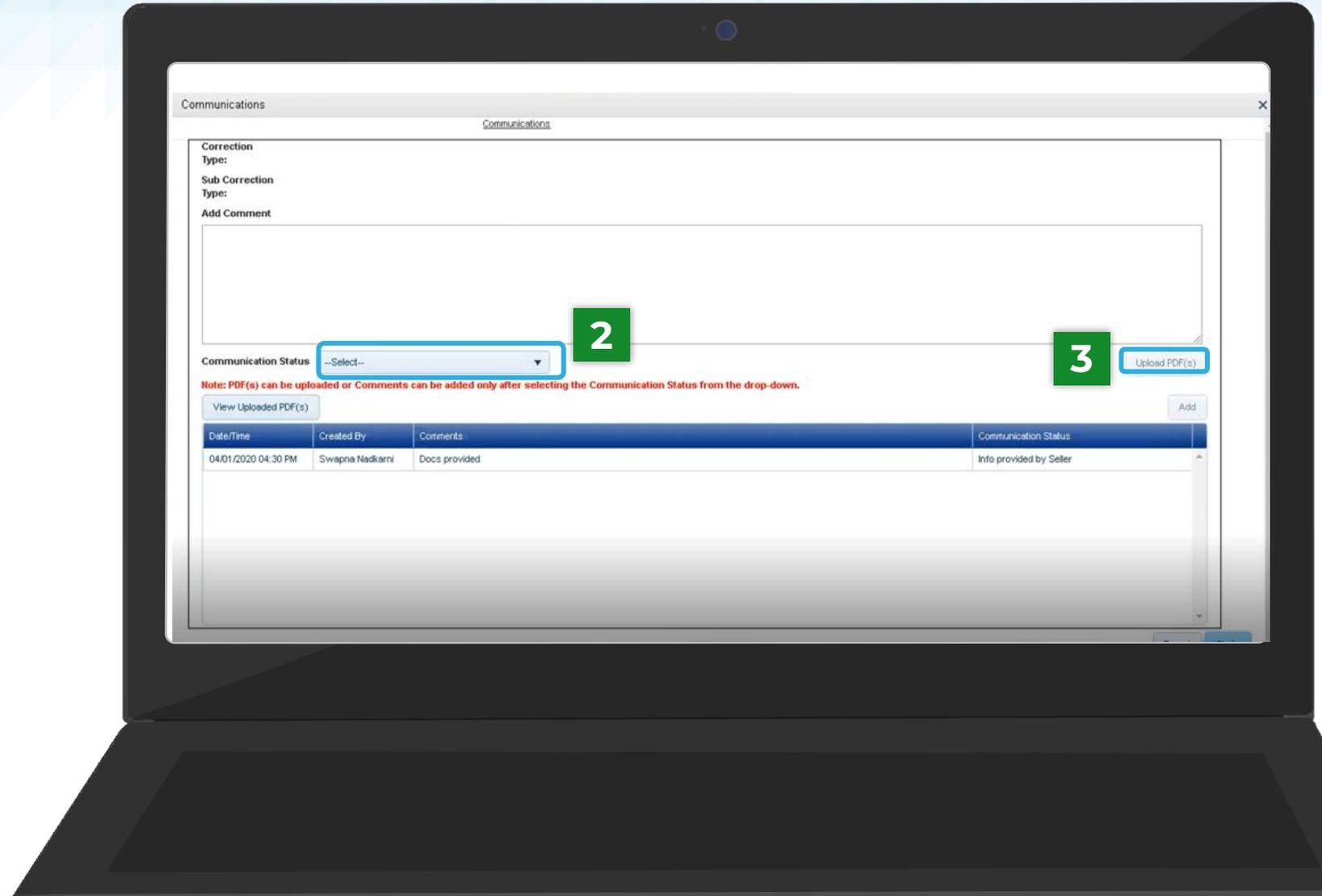
Follow the next steps to add additional information to a post funding request after creating it:

- 1 Click the **Create Communication** button under the Communication Status column for the correct request.

The screenshot shows a web application interface for managing post-funding requests. At the top, there is a 'Search Criteria' section with several dropdown menus for 'Analyst', 'Correction Type', 'Sub Correction Type', 'Request Status', and 'Request Sub Status'. There are also date pickers for 'Request Date From-To' (4/1/2020 to 04/01/2020) and a 'Communication Status' dropdown. To the right, there are sections for 'Single/Multi Loan Search' and 'Single/Multi Loan Search Values'. Below the search criteria, there is a table with columns: Request Amount, Adjusted Amount, Details of Request, Analyst, Communication Status, Communication Status Date/Time, Request Status, Request Sub Status, Request Sub Status Date/Time, Requestor Details, Check #, and Invoice #. A single row is visible in the table with a value of \$100.00 in the Request Amount column. A green box with the number '1' is overlaid on the 'Create Communication' button in the 'Communication Status' column of the table. Below the table, there is a large white area, likely a placeholder for additional information or a confirmation message.

Post Funding Requests Additional Information

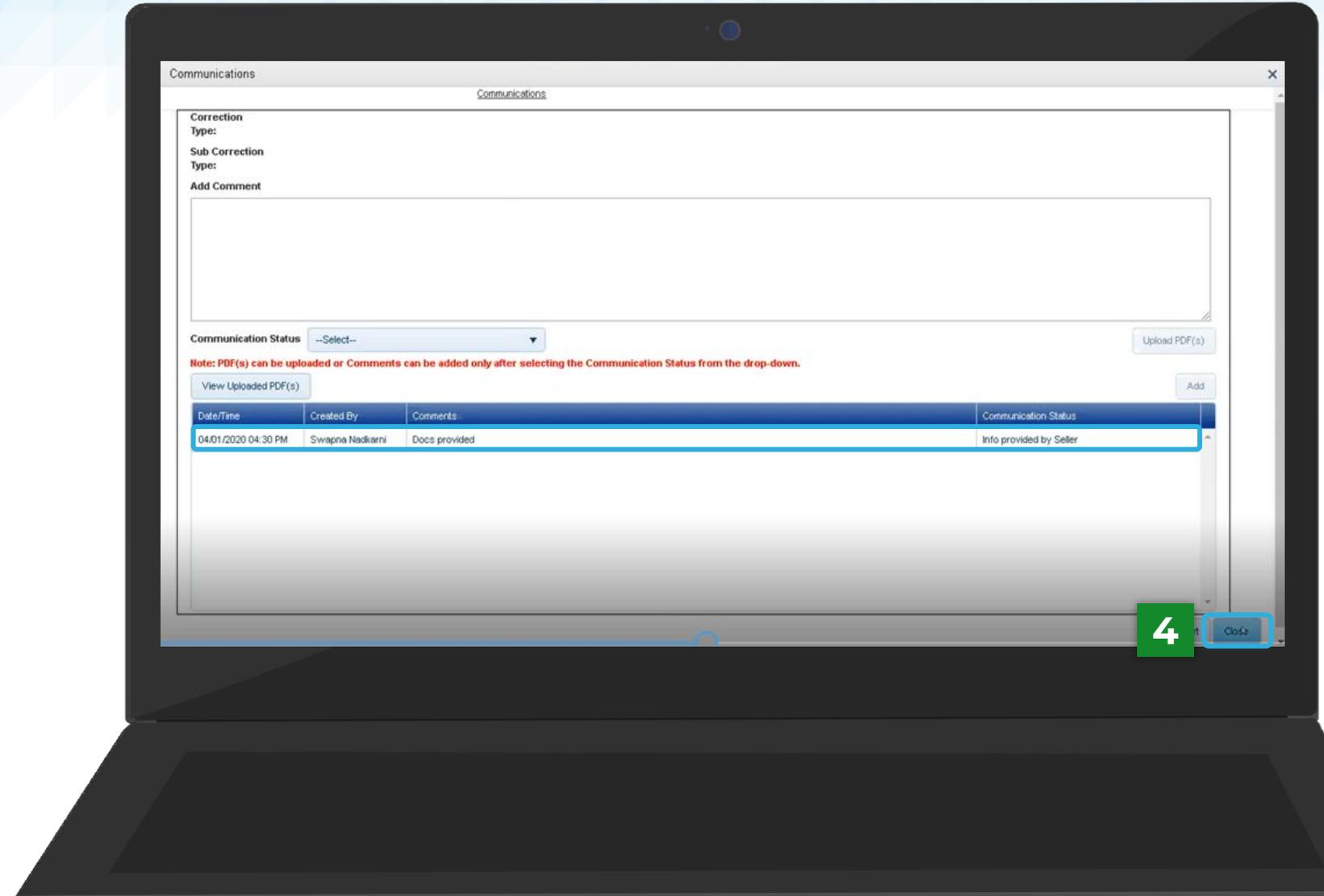
- 2 Pick the corresponding **Communication Status** from the drop-down menu.
- 3 Click the **Upload PDF** button.



Post Funding Requests Additional Information

4 After selecting the document from the computer, click the **Close** button.

i When the upload is completed, the document will appear on the screen.



Learning takeaways from this case:

- ✓ Understand the process to create single post funding requests
- ✓ Learn to create bulk post funding requests
- ✓ Learn to add additional information to requests after creating them



**THANK
YOU!**

