

Client Readiness Training

# Delegated Document Submission & Reporting

# Submit Condition Documentation

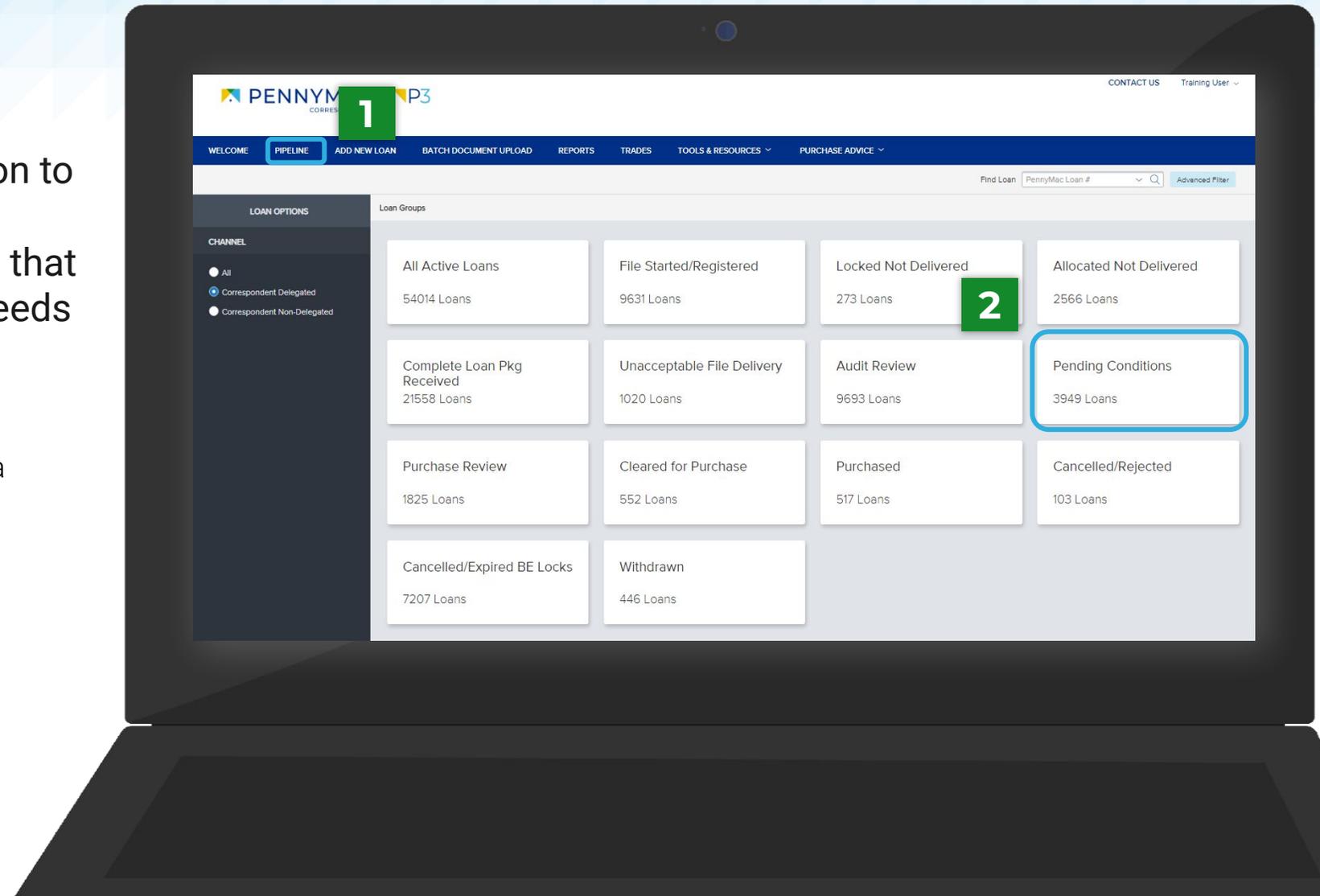
# Submit Condition Documentation

To submit condition documentation to a loan, the loan has to have open “Pending Conditions”. This means that the loan has been reviewed and needs additional loan documentation.

**i** Uploading condition documents to a loan will only be enabled if the loan has outstanding conditions.

**1** Go to the *Pipeline* tab.

**2** Click the Pending Conditions tile.



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**3** Select the loan from the list.

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'. The main content area shows a table of loans under the 'Pending Conditions' filter. The table columns are: PennyMac Loan #, Seller Loan #, Borrower Last Name, Property State, Current Status, Loan Type, Loan Amount, Note Rate, Loan Program, and Comments. The row for loan 8150091006 is highlighted with a blue border. The left sidebar contains 'LOAN OPTIONS' and 'CHANNEL' sections with radio buttons for 'All', 'Correspondent Delegation', and 'Correspondent Non-Delegation'. A green box with the number '3' is overlaid on the 'Correspondent Delegation' radio button.

PennyMac Loan #	Seller Loan #	Borrower Last Name	Property State	Current Status	Loan Type	Loan Amount	Note Rate	Loan Program	Comments
8152405208			MN	In Review	Conventional	300,000.00	4.750	Conf 21-30 Fixed	09/11/2018
8153097683			CA	In Review	Conventional	8,900.00	2.625	Conf 21-30 Fixed	02/11/2018
8152955446		214 CP8 don't touch	TX	In Review	VA	300,000.00	4.750	Conf 21-30 Fixed	01/11/2018
8150091006	8340563532	AutoLName125	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	07/11/2018
8150046366	8386655864	AutoLName145	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	07/11/2018
8150605768	8675623435	AutoLName176	CA	In Review	VA	499,500.00	3.875	VA 18-30 Fixed	09/11/2018
8150045677	5327737209	AutoLName215	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	07/11/2018
8150048195	6041177201	AutoLName235	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	07/11/2018
8150037477	9145923762	AutoLName235	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	07/11/2018
8150692863	1315191832	AutoLName340	CA	In Review	Conventional	499,500.00	3.875	Conf 21-30 Fixed	09/11/2018

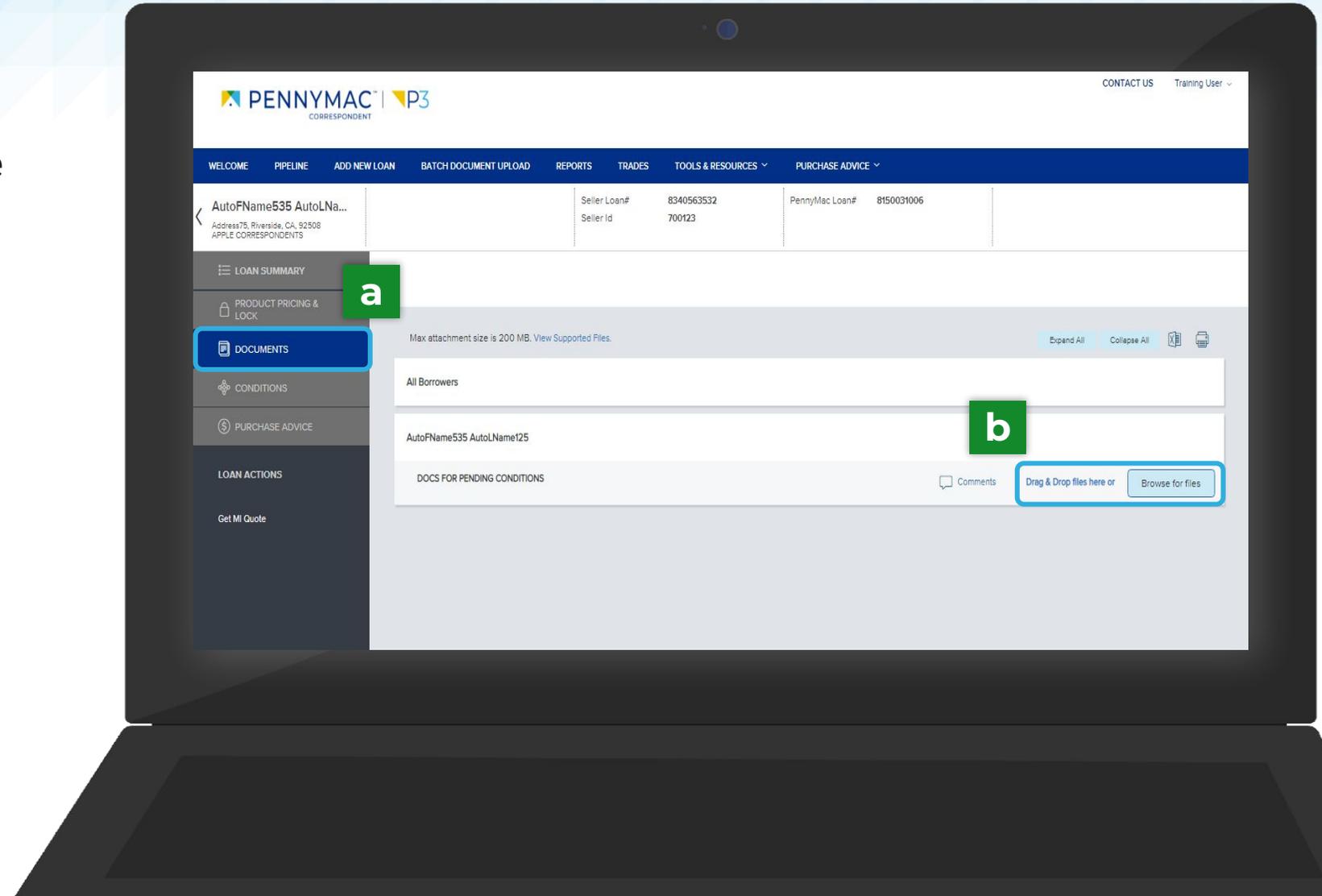
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There are two options to complete pending conditions:

Option 1:

- a** Click on the *Documents* section.
- b** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.

**i** The file will appear with a green check when uploading is complete. Conditions do not require a *Submit* button to be clicked and one will not be displayed.



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## Option 2:

- a** Click on the *Conditions* section.
- b** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.
- c** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.

**i** Condition status will also show on this screen. Statuses include *Open*, *Received*, & *Satisfied*.

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'. The main content area shows a loan summary for 'AutoFName535 AutoLNa...' with details like 'Address: 75, Riverside, CA, 92508' and 'APPLE CORRESPONDENTS'. The 'CONDITIONS' section is active, showing a table with one condition: 'Original note required.' with a status of 'Added' and a type of 'P'. A 'DOCS FOR PENDING CONDITIONS' button is highlighted below the table.

**THANK  
YOU!**

