

# Review Legacy Loan Data

JOB AID

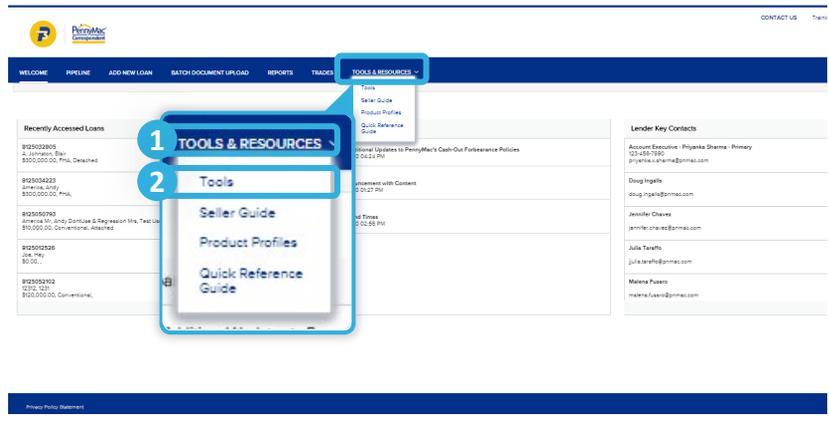
This Job Aid walks you through how to access historical loan data, called legacy loan data in P3.

## ATTENTION!

The **Post Funding Requests** application can only be accessed by the following user roles: **Administrator, Seller Lock Desk, Post Funding Adjustments.**

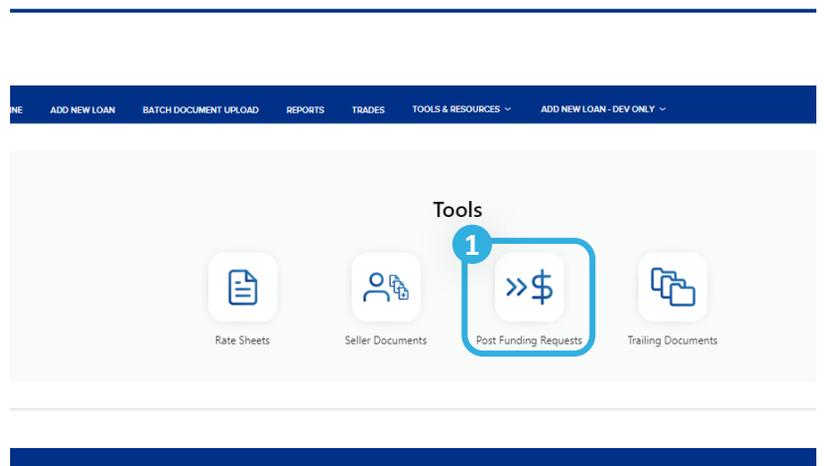
**A** To view historical loan data from the Pipeline page:

1. Go to the *Tools & Resources* tab.
2. Click the **Tools** link.



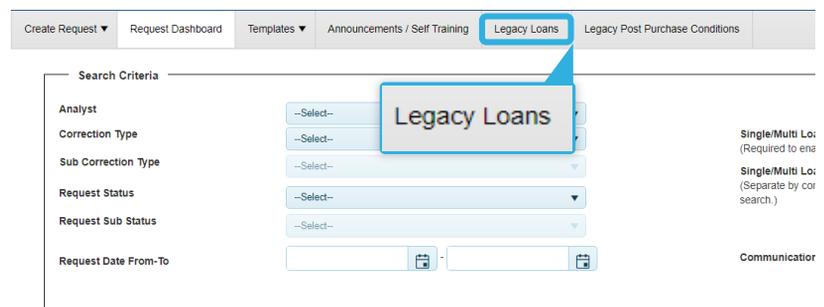
**B** Once in the **Tools** section:

1. Select the **Post Funding Requests** app.



**C** Once in the **Post Funding Requests** App:

1. Click on the **Legacy Loans** tab



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

PennyMac Loan #	Seller Loan #	Borrower Name	Request Date/Time	Correction Type	Sub Correction Type
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**D** Within the **Legacy Loans** tab you will find the following information to search from:

1. PennyMac Loan #
2. Seller Loan #
3. Borrower Last Name
4. Property Address
5. Lock Date
6. Purchase Date

**TIP**

You can access **Lock Confirmation** and the **Purchase Advice** by clicking the link in the *Lock Date* and *Purchase Date* column.

The screenshot shows the PennyMac Correspondent web application interface. At the top, the logo for PennyMac Correspondent is visible. Below the logo, there is a navigation bar with the following items: 'Welcome, Terry Post Funding (Home)', 'Company Name: APPLE CORRESPONDENTS', and 'Sign Out'. A secondary navigation bar contains 'Create Request', 'Request Dashboard', 'Templates', 'Announcements / Self Training', 'Legacy Loans', and 'Legacy Post Purchase Conditions'. The main content area features a 'Search Criteria' section with input fields for 'PennyMac Loan #', 'Seller Loan #', 'Borrower Last Name', 'Purchase Date From:', and 'Purchase Date To:'. There are 'Apply Filter' and 'Clear Filter' buttons. Below the search criteria is a table with columns: 'PennyMac Loan #', 'Seller Loan #', 'Borrower Last Name', 'Property Address', 'Lock Date', and 'Purchase Date'. The table body is currently empty.



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