

Client Readiness Training

# Non Delegated Document Submission & Reporting

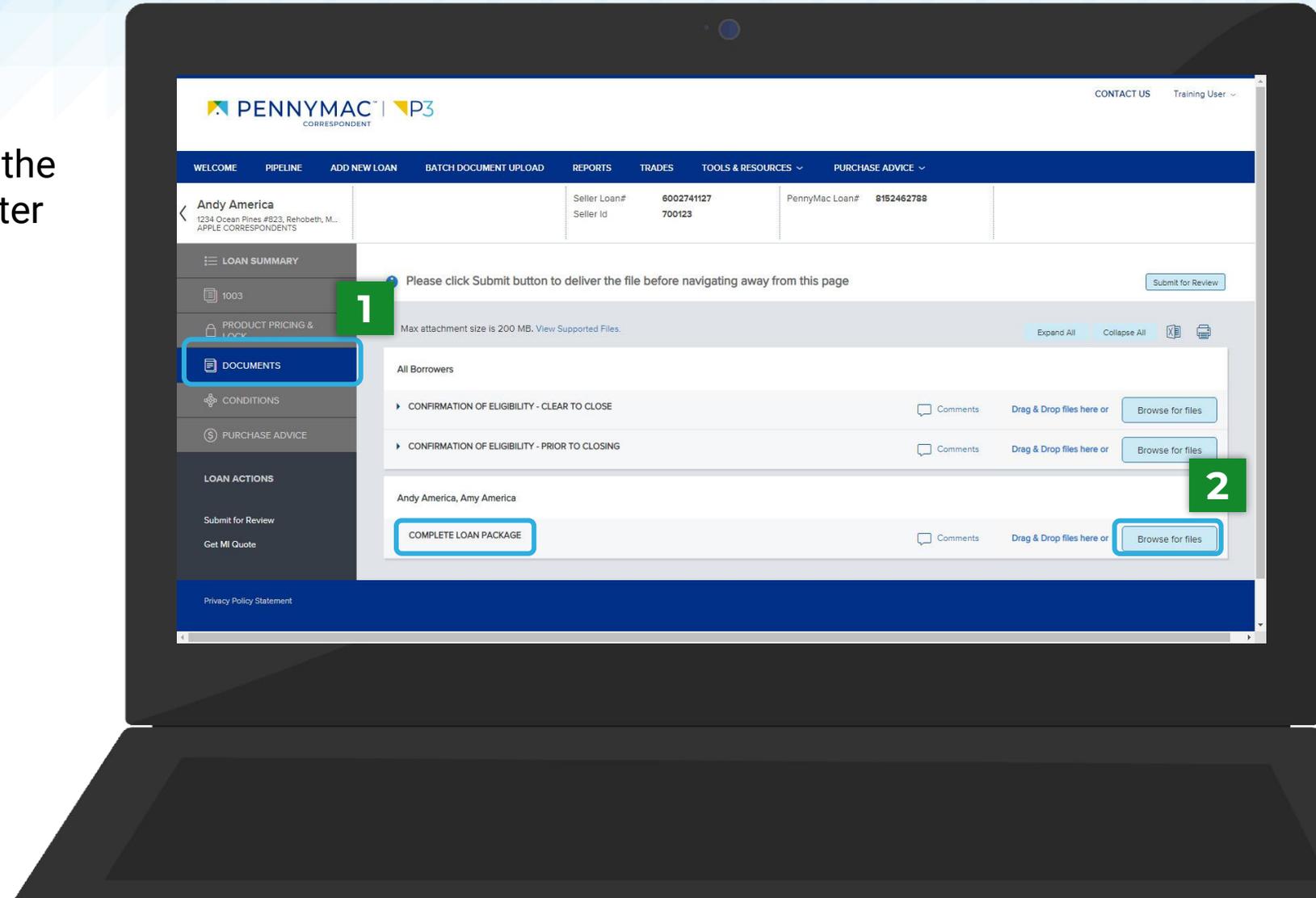
# Complete Loan Package

# Complete Loan Package

Once the eligibility review is done, the loan package can be submitted after uploading documentation

- 1 Go to the Documents section of the loan.
- 2 Upload documents to the *Complete Loan Package* folder using the **Drag & Drop files** option or **Browse for files** for selecting files saved in the computer.

 Zip files are not supported in P3.

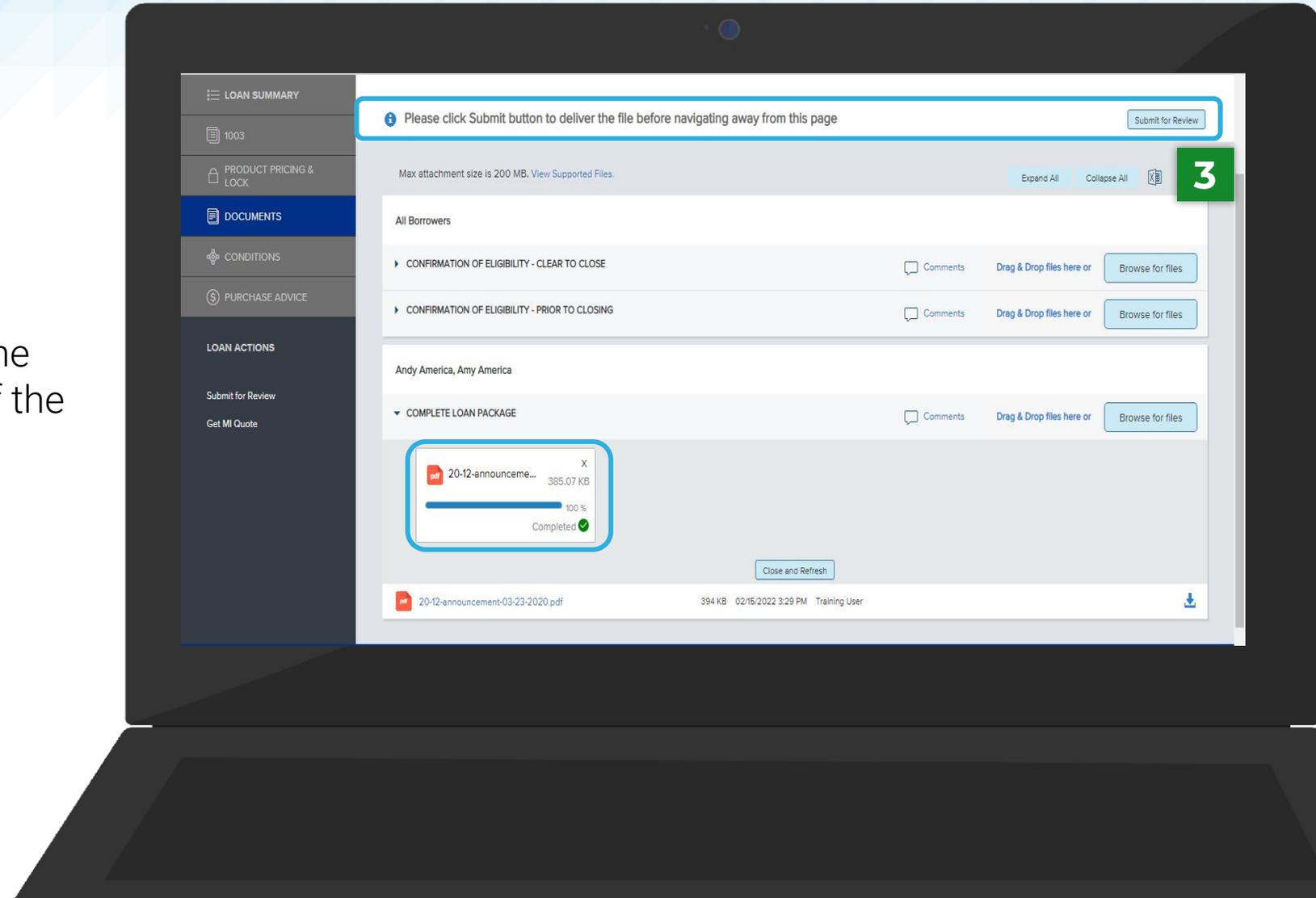


# Complete Loan Package

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.

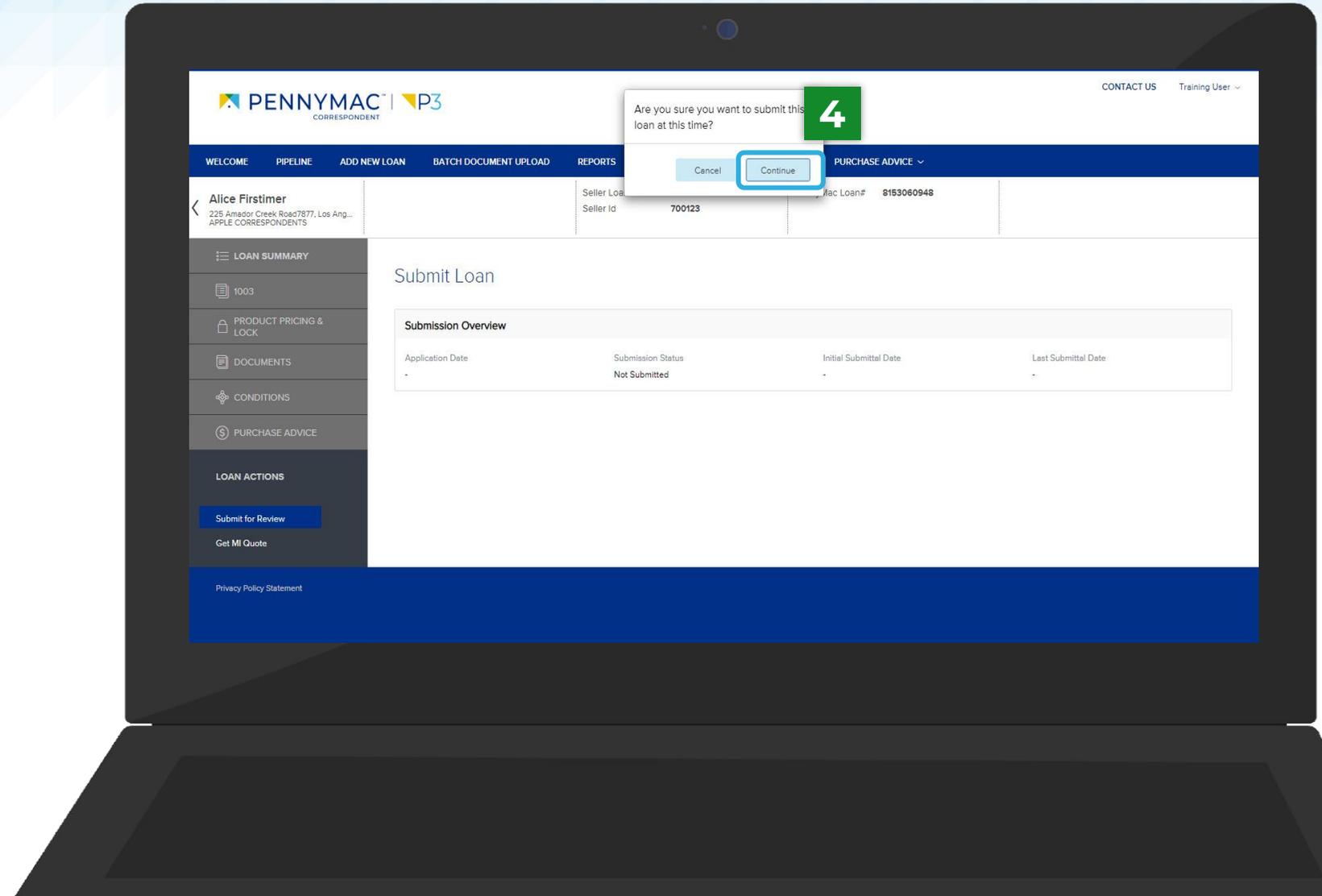
**3** Click the **Submit for Review** button.



# Complete Loan Package

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

**i** After following these steps, the loan is in the queue for PennyMac to review and all the editing options will be disabled.



# 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 **Lock Not Delivered** tile for Best Effort loans or the **Allocated Not Delivered** tile for Mandatory loans.

The screenshot displays the PennMac Correspondent Pipeline screen. The top navigation bar includes 'WELCOME', 'PIPELINE' (highlighted with a blue box), 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE ADVICE'. A search bar on the right contains 'Find Loan' and 'PennyMac Loan #' with a search icon and an 'Advanced Filter' button. The main content area is titled 'Loan Groups' and features a grid of 16 tiles. The 'Complete Loan Pkg Received' tile, containing '587 Loans', is highlighted with a blue border and a green '6' in a box. Other tiles include 'All Active Loans' (39730 Loans), 'File Started/Registered' (10147 Loans), 'Locked Not Delivered' (102 Loans), 'Allocated Not Delivered' (0 Loans), 'Eligibility File Received' (20102 Loans), 'Unacceptable Eligibility Delive...' (27 Loans), 'Eligibility Audit Review' (1306 Loans), 'Pending Eligibility Conditions' (3195 Loans), 'Eligibility Approved' (411 Loans), 'Eligibility Rejected' (448 Loans), 'Unacceptable File Delivery' (30 Loans), 'Audit Review', 'Pending Conditions', 'Purchase Review', and 'Cleared for Purchase'. A left sidebar shows 'LOAN OPTIONS' and 'CHANNEL' with radio buttons for 'All', 'Correspondent Delegated', and 'Correspondent Non-Delegated' (selected).

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**7** Find the loan in the pipeline list.

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

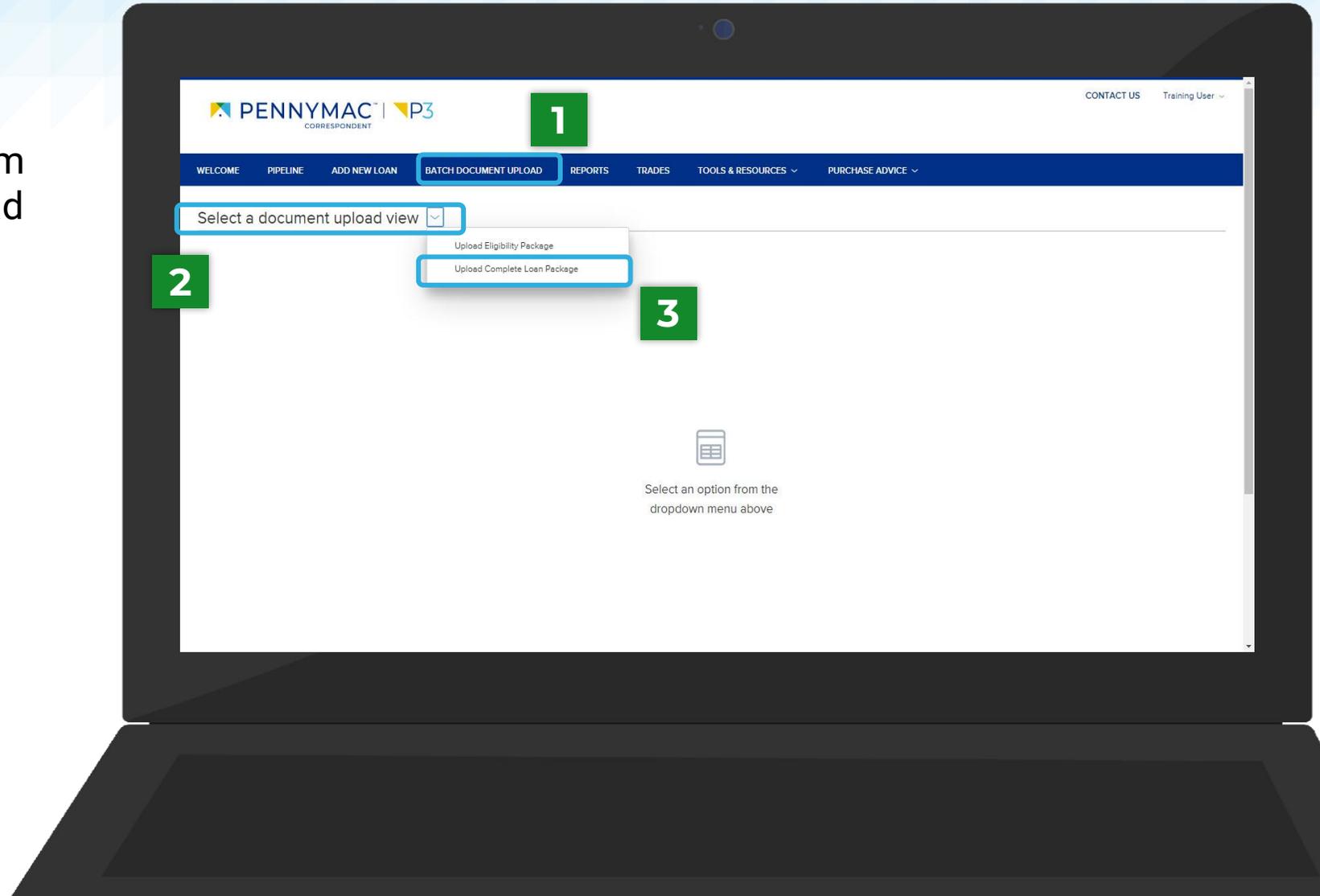
The screenshot displays the PENNYMAC CORRESPONDENT P3 interface. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE ADVICE'. A search bar in the top right corner is labeled 'Find Loan' and contains the text 'PennyMac Loan #'. Below the navigation bar, a table lists loan details. The table has the following columns: PennyMac Loan #, Seller Loan #, Borrower Last Name, Property State, Current Status, Loan Type, Loan Amount, Note Rate, and Loan Program. The row for loan # 8153048622 is highlighted with a blue border. A green box with the number 7 is overlaid on the table. The bottom of the interface shows a 'Privacy Policy Statement' link.

| PennyMac Loan # | Seller Loan # | Borrower Last Name | Property State | Current Status                      | Loan Type                 | Loan Amount | Note Rate | Loan Program |
|-----------------|---------------|--------------------|----------------|-------------------------------------|---------------------------|-------------|-----------|--------------|
| 8152581661      | 6002740916    | America            | MD             | Complete Loan Package File Delivery | FarmersHomeAdministration | 200,000.00  | 0.000     |              |
| 8153048796      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153010959      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153048622      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153011164      |               | AutomationTest     | CA             | In Review                           | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153015606      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153048679      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |
| 8153015679      |               | AutomationTest     | CA             | Complete Loan Package File Delivery | Conventional              | 50,000.00   | 0.000     | HomePossible |

# Complete Loan Package

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

- 1** Go to the Batch Document Upload tab.
- 2** Click the **Select a document upload view** drop-down menu.
- 3** Select the **Upload Complete Loan Package** option.



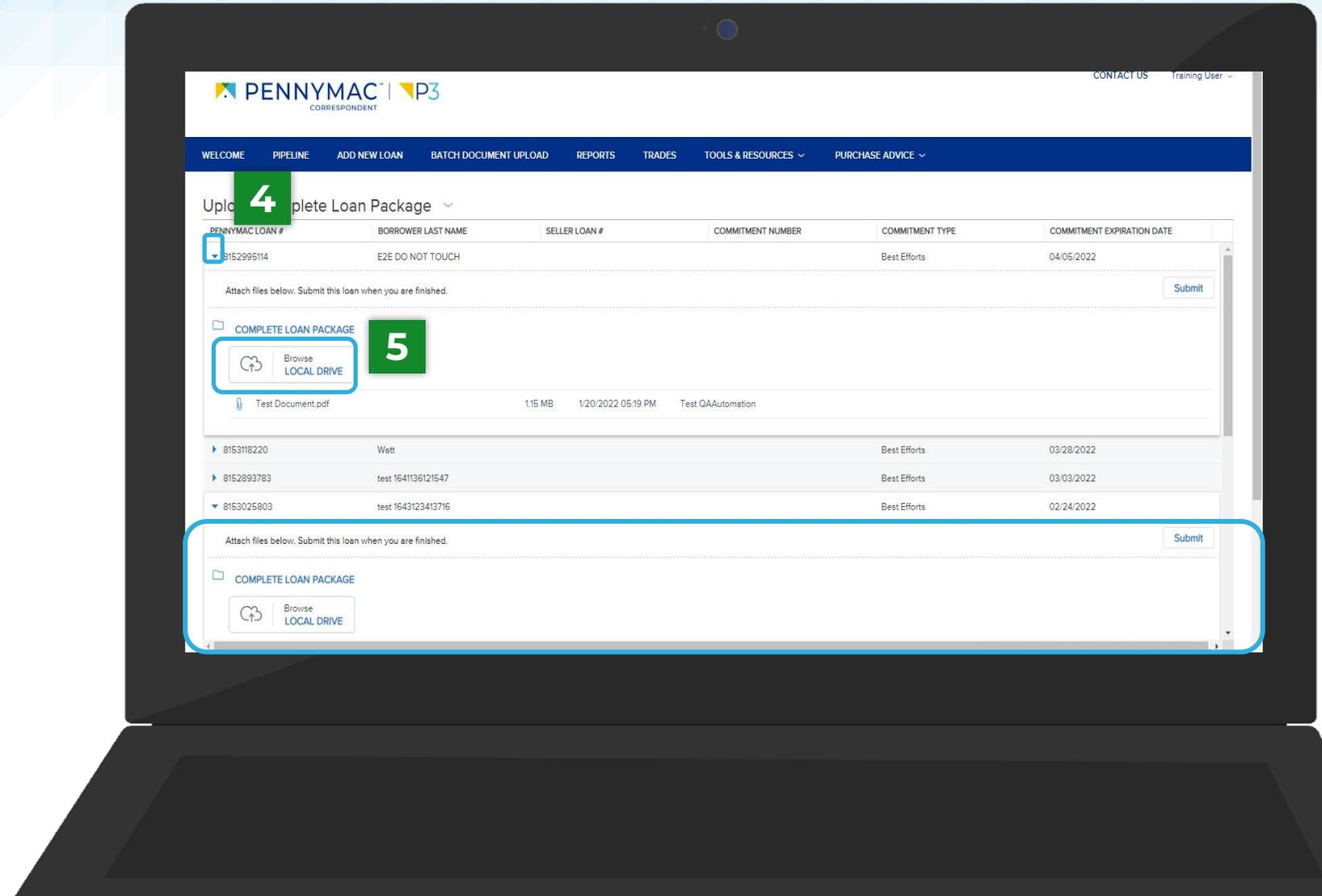
# Complete Loan Package

**4** Click on the arrow at the left of the loan line.

**5** 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.

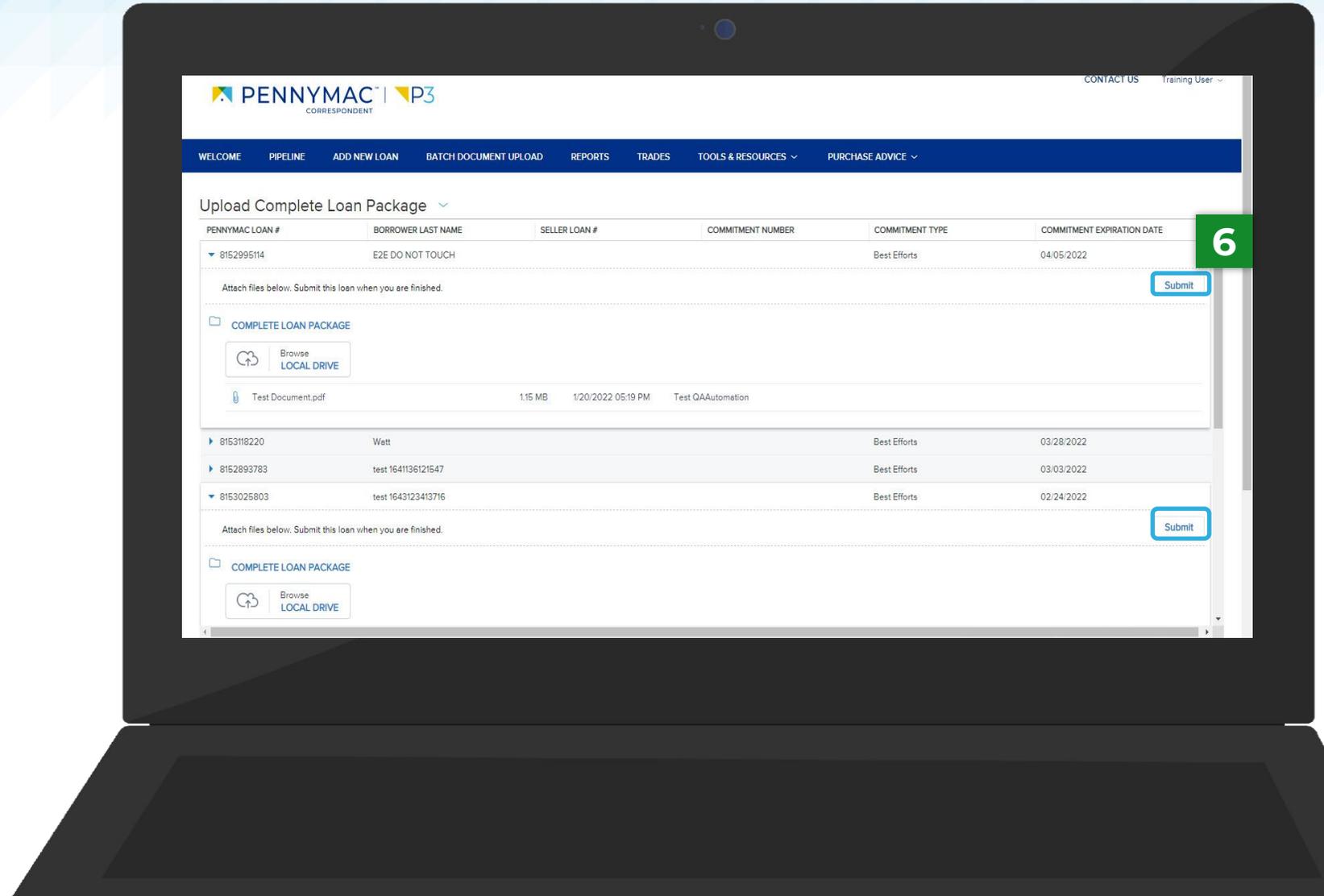
**i** Multiple loan packages can be completed repeating these steps for different loans.



# Complete Loan Package

**6** Click the Submit button for each loan uploaded to.

With this last step uploading the loan package is complete!



**THANK  
YOU!**

