

# Contact Assignment

## JOB AID

This Job Aid walks you through the steps to assign or reassign LOs/LPs to existing loans in your pipeline.

**A** From the pipeline screen:

1. Select the pipeline view for the stage your specific loan is in or...
2. Enter a specific loan number.

*Remember! Only the following Personas can assign or reassign existing loans:*

- Seller Admin
- Seller Rep
- Lock Desk
- Seller Processor

The screenshot shows the Pennymac P3 Correspondent Pipeline interface. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE'. A search bar on the right is labeled 'Find Loan | Pennymac Loan #' and has a '2' callout. The main content area is titled 'Loan Options' and 'Loan Groups'. A grid of loan categories is displayed, with 'File Started/Registered' (9996 Loans) highlighted by a blue box and a '1' callout. Other categories include 'All Active Loans' (38928 Loans), 'Locked Not Delivered' (137 Loans), 'Allocated Not Delivered' (0 Loans), 'Eligibility File Received' (19705 Loans), 'Unacceptable Eligibility Delive...' (22 Loans), 'Eligibility Audit Review' (1286 Loans), 'Pending Eligibility Conditions' (3087 Loans), 'Eligibility Approved' (404 Loans), 'Eligibility Rejected' (431 Loans), 'Complete Loan Pkg Received' (552 Loans), and 'Unacceptable File Delivery' (28 Loans).

**B** Once in a pipeline view scroll to the far right.

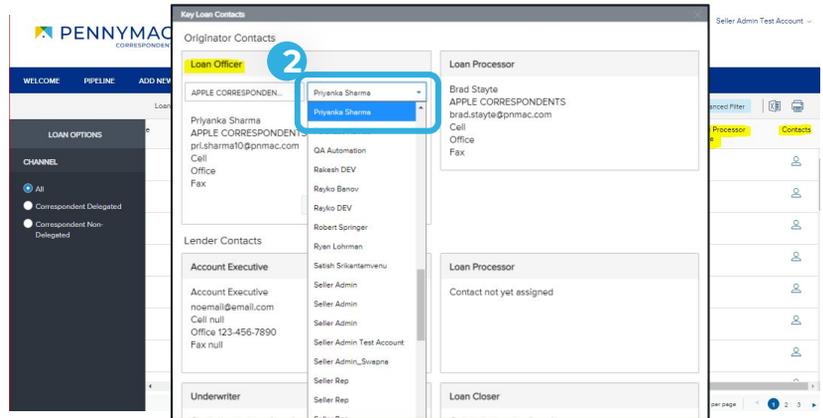
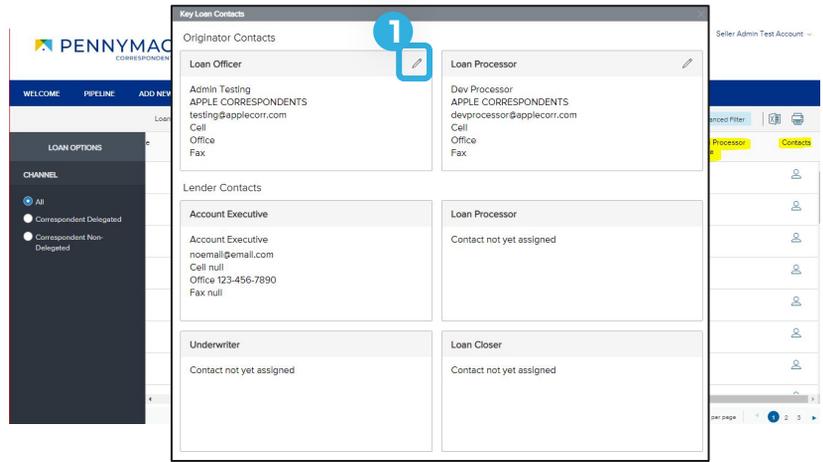
1. Locate the *Contacts* column.
2. Select the *Contact Icon* for the loan you wish to assign/reassign.

The screenshot shows the Pennymac P3 Correspondent Pipeline interface with a list of loans. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'ADD NEW LOAN - DEV ONLY'. A search bar on the right is labeled 'Find Loan | Pennymac Loan #' and has a '1' callout. The main content area is titled 'Loan Options' and 'Loan Groups'. A table of loans is displayed, with columns for 'Commitment Type', 'Commitment Number', 'Commitment Expiration Date', 'Open Conditions', 'Underscriving Type', 'Loan Officer Name', 'Loan Processor Name', and 'Contacts'. The 'Contacts' column is highlighted by a blue box and a '1' callout. A 'Contact Icon' is highlighted by a blue box and a '2' callout.

**C** The *Key Loans Contact* window displays.

1. Select the *Edit* pencil in the *Loan Officer* section.
2. Select the correct contact from the dropdown list and click save.

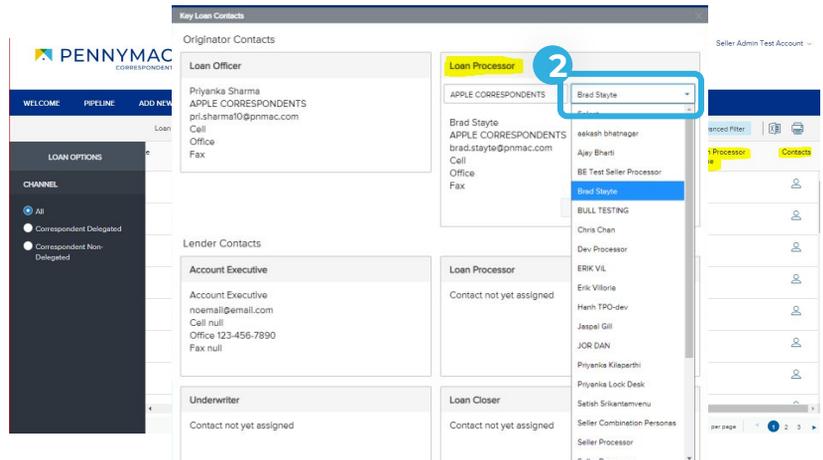
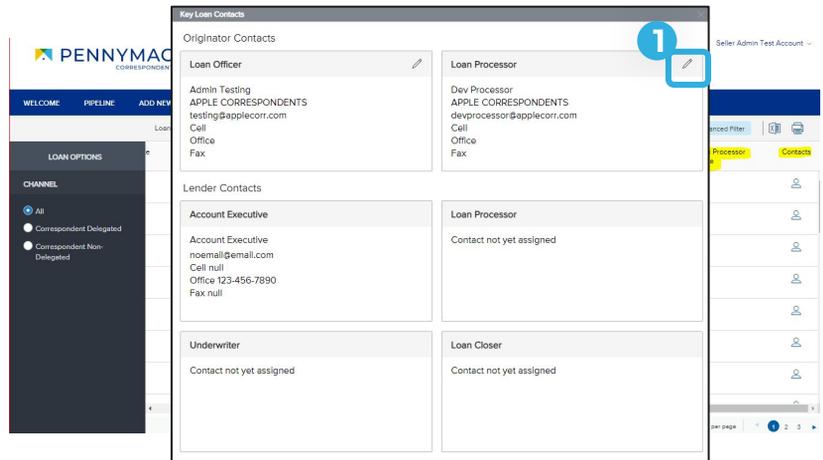
The *LO* drop down will contain the names of all users with the *Seller Rep* and/or *Seller Admin* personas.



**D** Repeat the process in the *Loan Processor* section of the *Key Loan Contacts* window.

1. Select the *Edit* pencil in the *Loan Processor* section.
2. Select the correct contact from the dropdown list and click save.

The *LP* dropdown will contain the names of all users with the *Seller Processor*, *Seller Rep*, and/or *Seller Admin* personas.





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