

Client Readiness Training

# Submit Pending Eligibility Review Documents

August 4, 2023

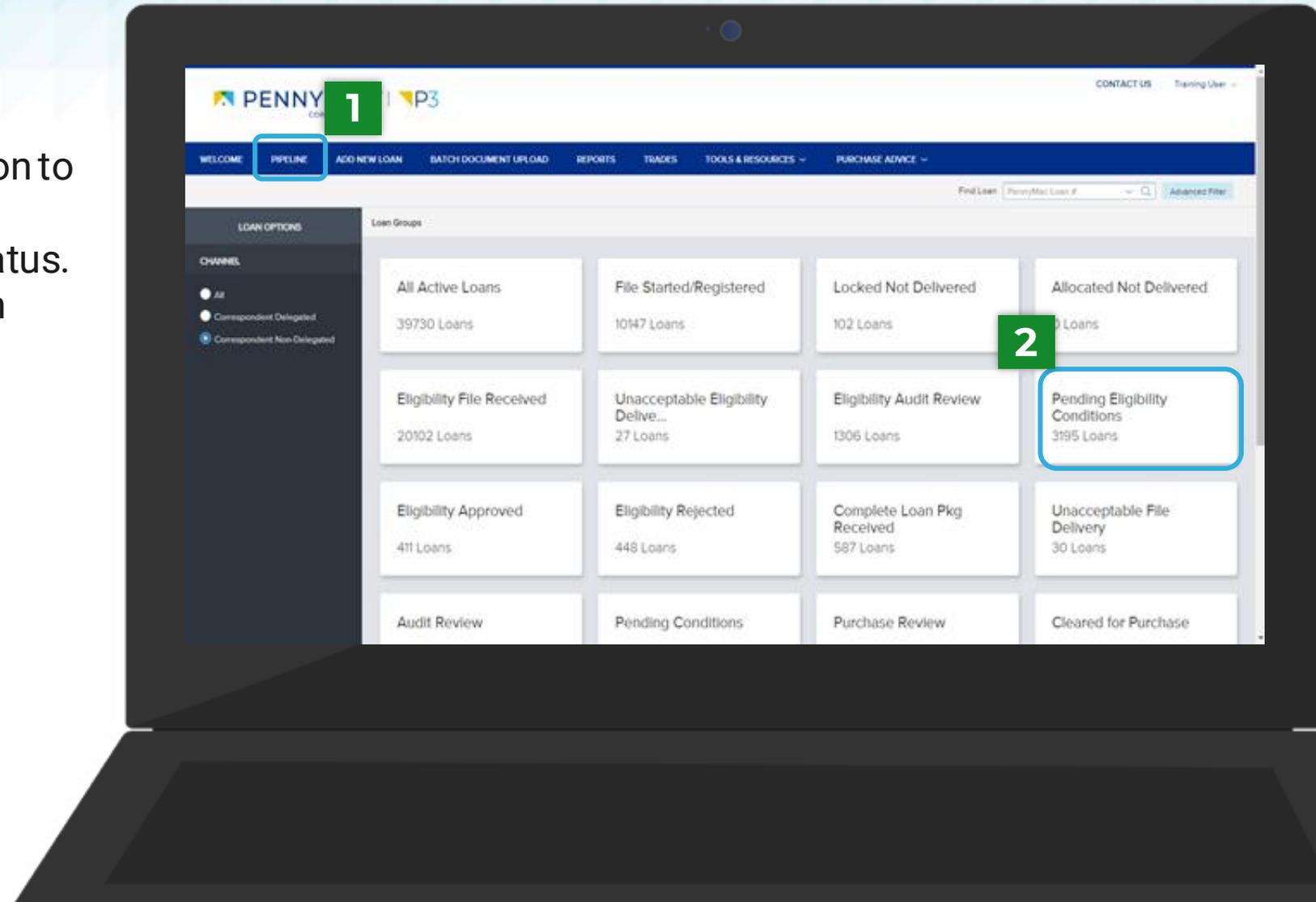
# Submit Pending Eligibility Condition Documentation

To submit condition documentation to a loan, the loan has to have the “Pending Eligibility Conditions” status. This means that the loan has been underwritten and has outstanding conditions.

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

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

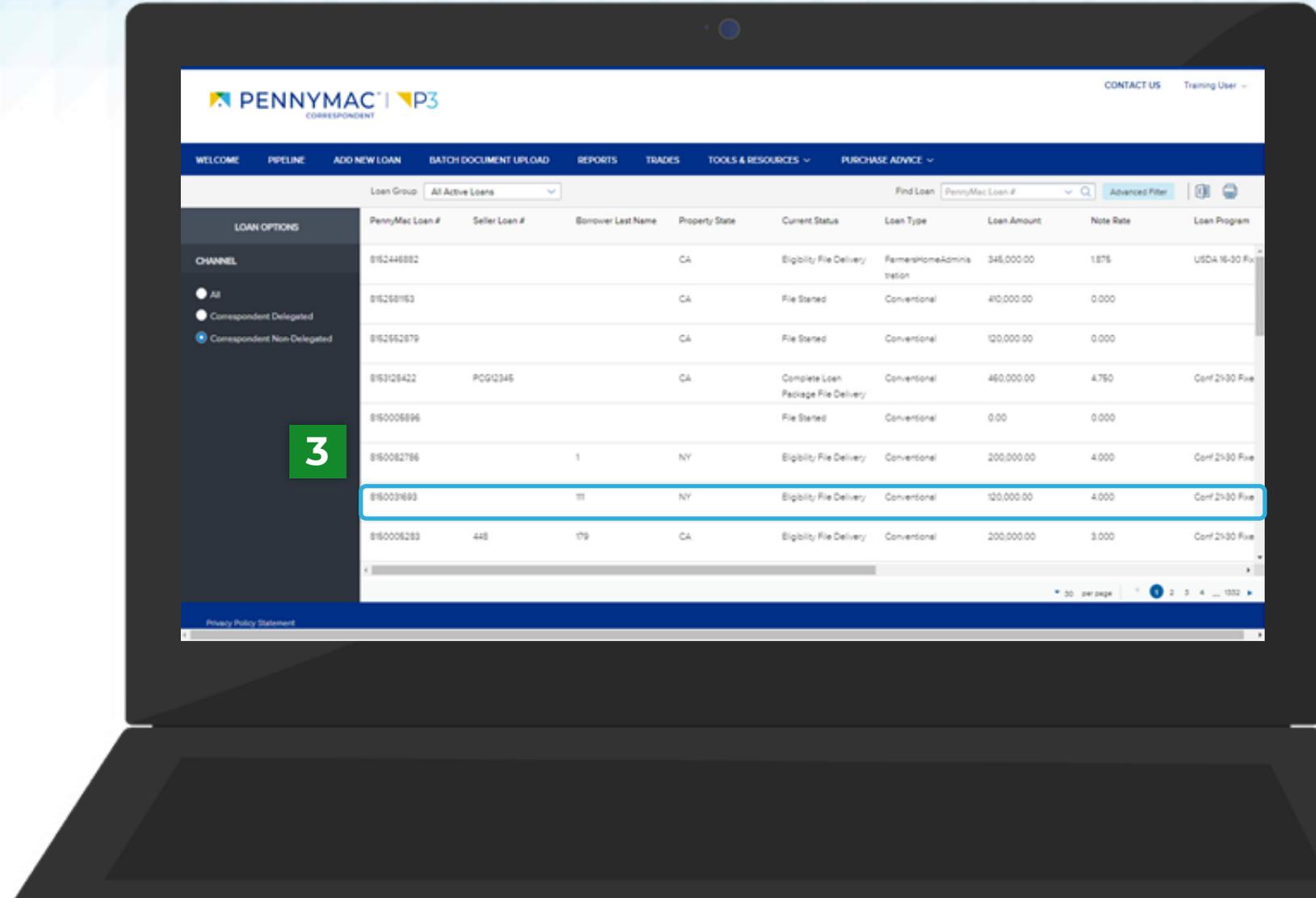
**2** Click the **Pending Eligibility Conditions** tile.



# Submit Pending Eligibility Condition Documentation

3

Select the loan from the list.



3

# Submit Pending Eligibility Condition Documentation

To complete pending eligibility conditions:

- 1 Click on the **Conditions** section.
- 2 Click the **arrow** button of the condition to expand its information.
- 3 Click the **conditions** folder to add documents.

Andy America  
1234 Ocean Pines #823, Rehobeth, ...  
APPLE CORRESPONDENTS

SELLER LOAN# 6002741004  
SELLER ID 700123

PENNYMAC LOAN# 8158647642

WELCOME PIPELINE ADD NEW LOAN BATCH DOCUMENT UPLOAD REPORTS TRADES TOOLS & RESOURCES PURCHASE ADVICE

LOAN SUMMARY  
URLA  
PRODUCT PRICING & LOCK  
DOCUMENTS  
CONDITIONS  
PURCHASE ADVICE

LOAN ACTIONS  
Get MI Quote

Conditions (8)

Condition Type All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION		DISPOSITION
07/25/2023	Added	Non-Delegat...	Eligibility Ap...	Pre Close	NTITLE1	Preliminary title report missing...	1	0
Description: Preliminary title report missing, Incomplete								
COLLATERAL - TITLE								
07/25/2023	Added	Non-Delegat...	Eligibility Ap...	Pre Close	APPR18	AUS is eligible for Freddie Ma...	1	0
07/25/2023	Added	Non-Delegat...	Eligibility Ap...	Pre Close	NAGEAPP	The effective date of the appra...	1	0
07/25/2023	Added	Non-Delegat...	Eligibility Ap...	Pre Close	BPO1	Manufactured Home Appraisal...	1	0
07/25/2023	Added	Non-Delegat...	Audit Approv...	Pre Purchase	NDEMND1	Demand for payoff missing, co...	0	0
07/25/2023	Added	Non-Delegat...	Audit Approv...	Pre Purchase	NCD1	Closing disclosure missing, Inc...	0	0
07/25/2023	Added	Non-Delegat...	Audit Approv...	Pre Purchase	NDEL2	Loan approval good for 30 da...	0	0
07/25/2023	Added	Non-Delegat...	Audit Approv...	Pre Purchase	NDEL1	The notice of conditional loan ...	0	0



Condition status will also show on this screen. Statuses include *Open, Received, Satisfied & Not Satisfied*

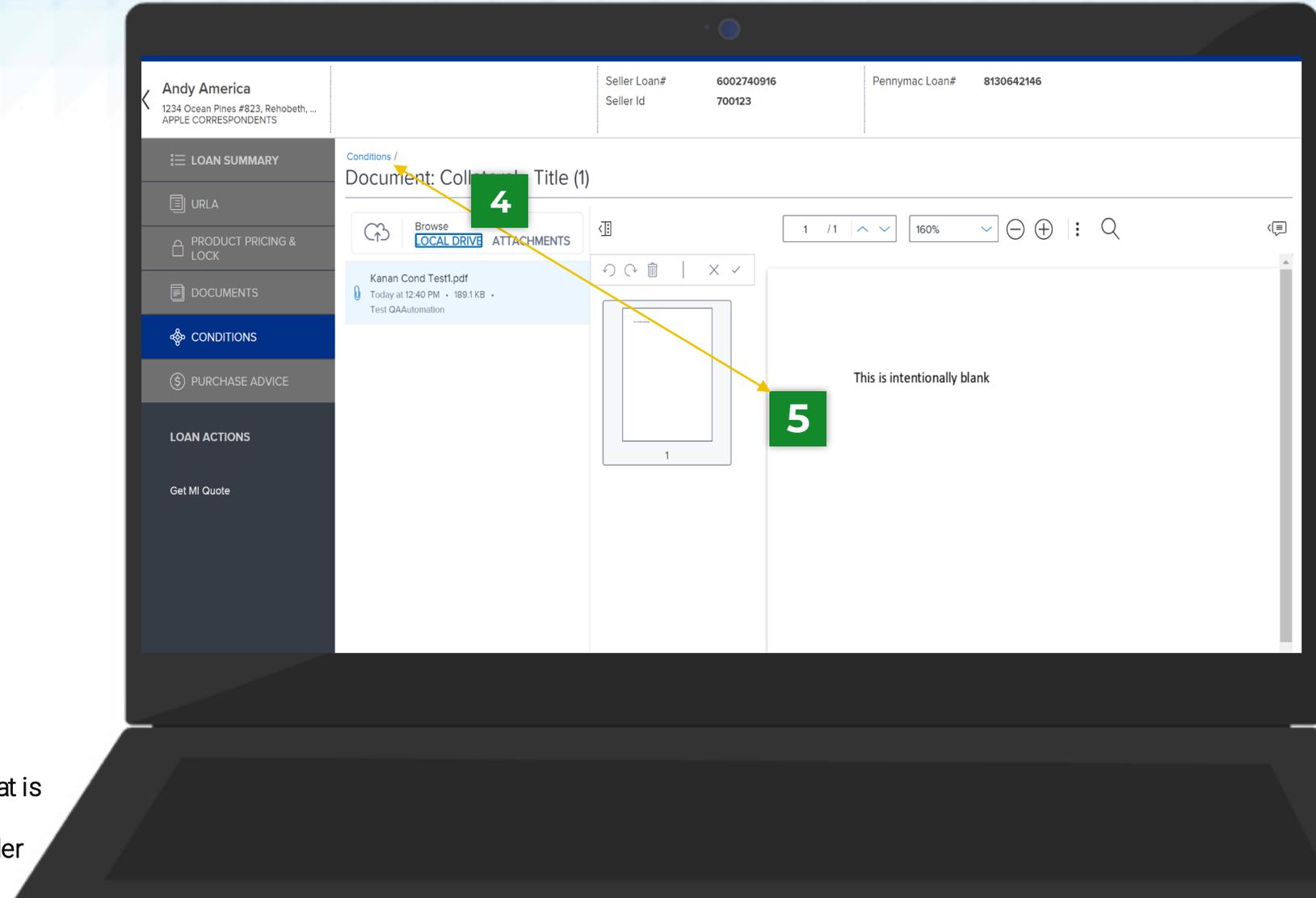
# Submit Pending Eligibility Condition Documentation

**4** Upload your documents by dragging and dropping or choosing the file from your computer.

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



For all change requests and any documentation that is not attached to a specific condition, please upload documents into the "Data Change Documents" folder in the documents screen.



# THANK YOU!



Equal Housing Opportunity © 2023 PennyMac Loan Services, LLC, 3043 Townsgate Rd, Suite 200, Westlake Village, CA 91361, 818-224-7442. NMLS ID # 35953. For licensing information go to [www.nmlsconsumeraccess.org](http://www.nmlsconsumeraccess.org). Trade/service marks are the property of PennyMac Loan Services, LLC and/or its subsidiaries or affiliates. Information is intended solely for mortgage bankers, mortgage brokers, and financial institutions.

Arizona Mortgage Banker License # 0911088. Licensed by the Department of Financial Protection and Innovation under the California Residential Mortgage Lending Act. Colorado office: 5500 South Quebec Street, Suite 260 Greenwood Village, CO 80111, (877) 215-2552. Massachusetts Mortgage Lender License # MC35953. Minnesota: This is not an offer to enter into an agreement and an offer may only be made pursuant to Minn. Stat. §47.206 (3) & (4). Licensed by the N.J. Department of Banking and Insurance. Licensed Mortgage Banker-NYS Department of Financial Services. North Carolina Permit No. 119504607, 119505929, 119506567, 119506570, 119507419. Rhode Island Licensed Lender License # 20092600LL, Loan Broker, and Third Party Loan Servicer. Texas office: 2201 W. Plano Parkway, Suites 150 and 300, Plano, TX 75075. For more information, review <https://www.pennymacbrokerdirect.com/state-licenses>. Co-op loans not available. Some products may not be available in all states. Information, rates and pricing are subject to change without prior notice at the sole discretion of PennyMac Loan Services, LLC. All loan programs subject to borrowers meeting appropriate underwriting conditions. This is not a commitment to lend. Other restrictions apply. All rights reserved. (01-2023)