

Client Readiness Training

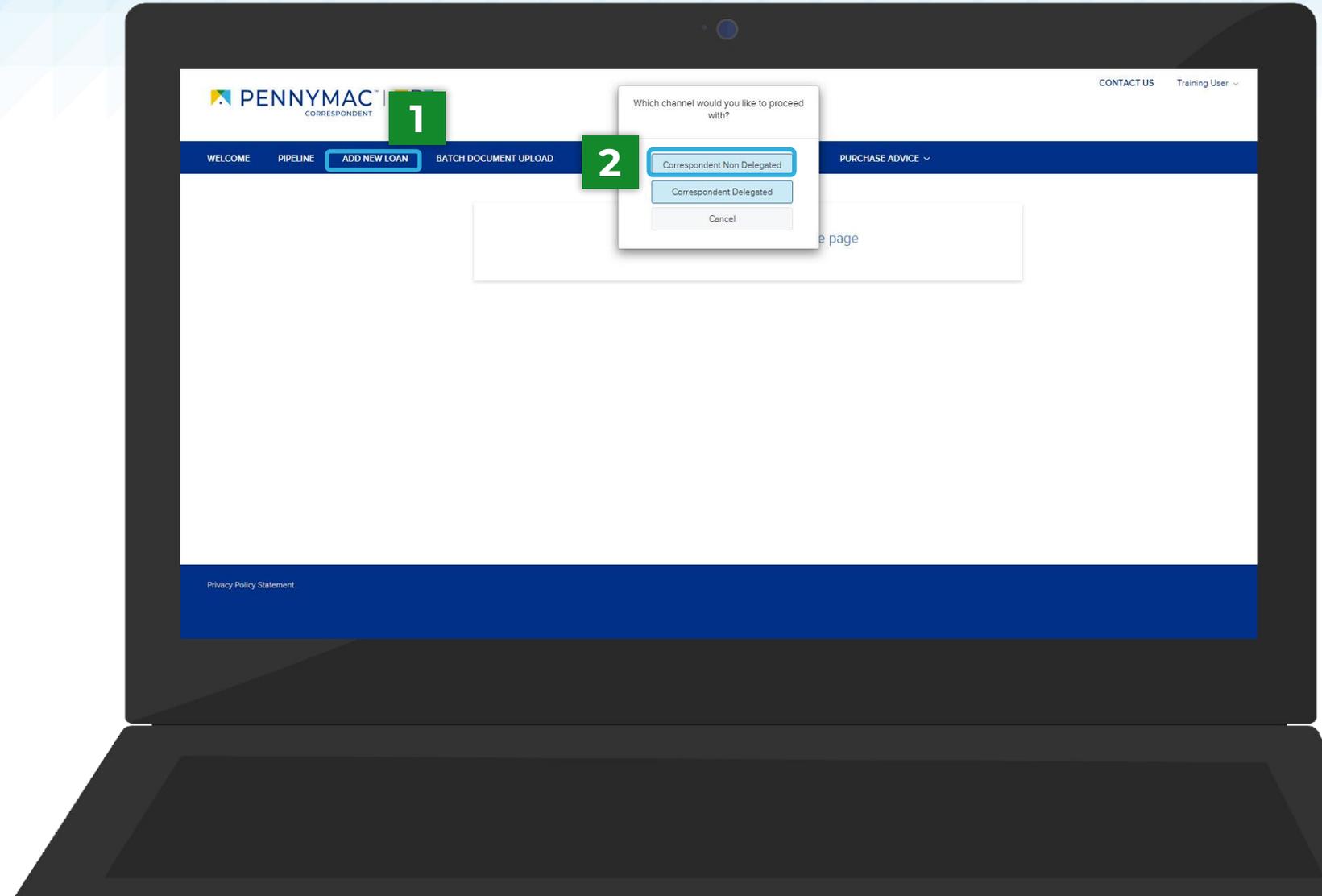
# Non Delegated Loan Processing

# ▼ Registering a Non-Delegated Loan

# Registering a Non-Delegated Loan

Follow the next steps to register a Non-Delegated loan:

- 1** After logging into P3, click on the **Add a New Loan** tab.
  - 2** Click the **Correspondent Non-Delegated** button.
- i** Step 2 is necessary only if the client is approved for both Delegated & Non-Delegated loans. Otherwise, it is directed to the Non-Delegated section automatically.



# Registering a Non-Delegated Loan

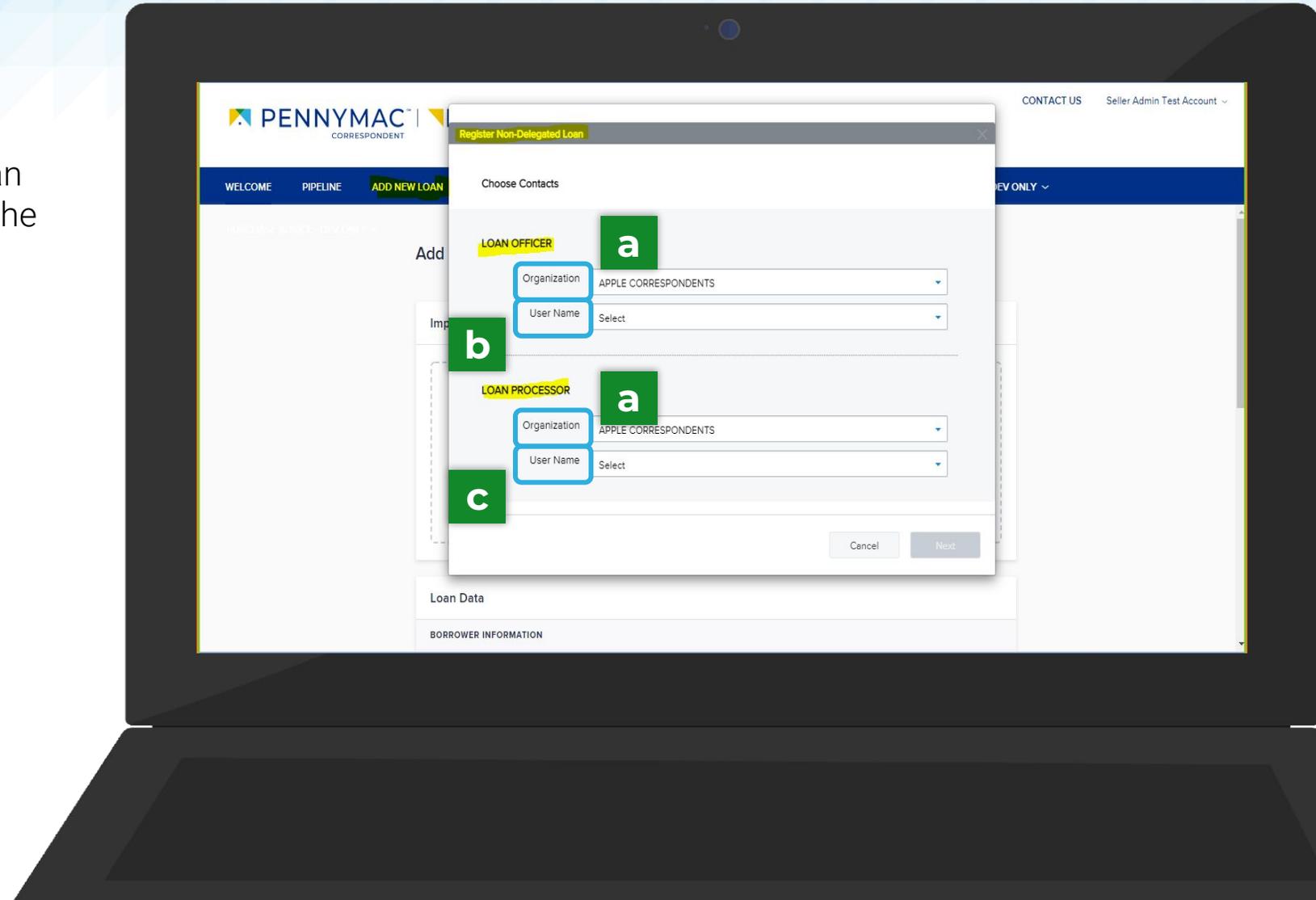
**3** Once in the Register Non-Delegated Loan screen, you will see a pop-up to assign the loan to a LO / LP

**a** **Organization** name will auto-populate.

**b** The **UserName (Loan Officer)** will include the list of active external users of your company having the personas of Seller Admin or Seller Rep.

**c** The **UserName (Loan Processor)** will include the list of active external users of your company having the personas of Seller Admin, Seller Rep or Seller Processor.

**i** The drop down list will only display your active users in P3. Both LO and LP must be selected to enable the Next button.

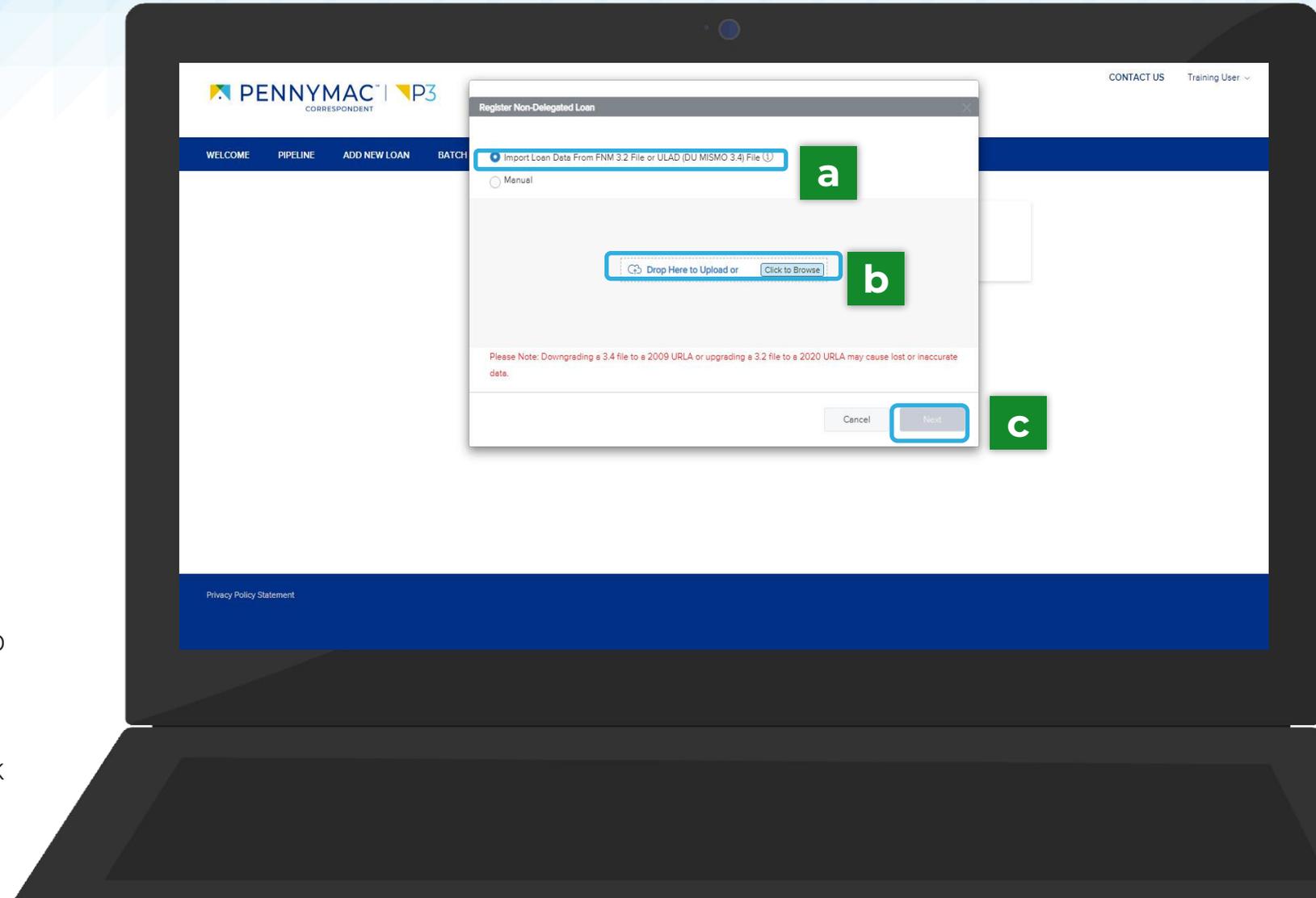


# Registering a Non-Delegated Loan

- 4** Once in the Register Non-Delegated Loan screen, there are 2 options to create the loan:

## Option 1

- a** Click the **Import Loan Data from FNM 3.2** option.
- b** Click the **Click to Browse** button to upload a Fannie Mae 3.2 (FNM) file from the computer or drag it to the **Drop Here to Upload** section.
- c** After uploading is completed, click the **Next** button to continue.



# Registering a Non-Delegated Loan

The system exports the file information and completes the required fields of the Loan Information page.

Information can be added or edited as needed here.

## Option 1



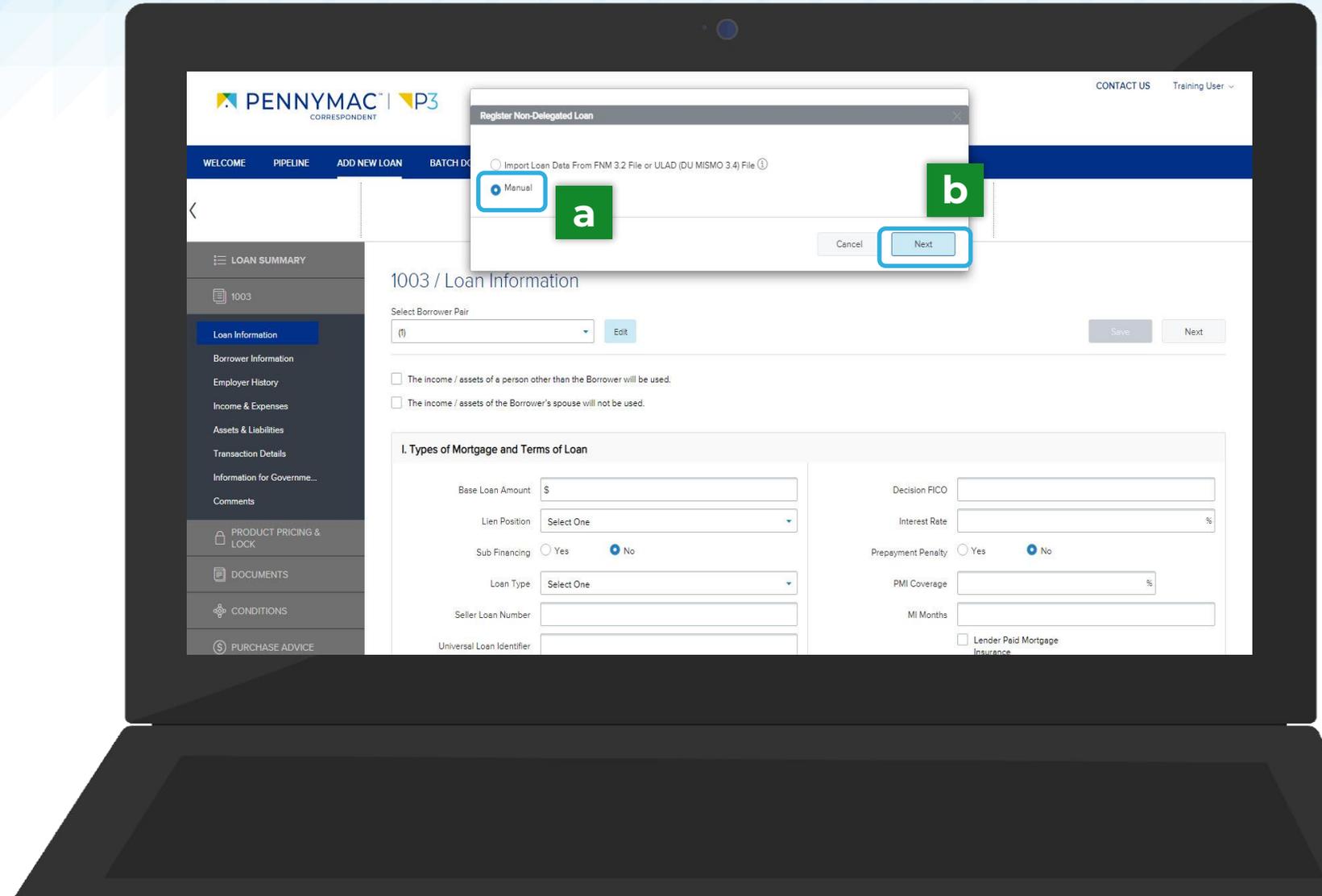
After reviewing the information, click the **Save** button.

The screenshot displays the PENNYMAC CORRESPONDENT P3 web application interface. The top navigation bar includes links for WELCOME, PIPELINE, ADD NEW LOAN, BATCH DOCUMENT UPLOAD, REPORTS, TRADES, TOOLS & RESOURCES, and PURCHASE ADVICE. The main content area is titled "1003 / Loan Information" and features a "Select Borrower Pair" dropdown menu with a "Save" button highlighted in blue. Below this, there are two checkboxes: "The income / assets of a person other than the Borrower will be used." (checked) and "The income / assets of the Borrower's spouse will not be used." (unchecked). The "I. Types of Mortgage and Terms of Loan" section contains several input fields: Base Loan Amount (\$200,000.00), Lien Position (First), Sub Financing (No), Loan Type (Conventional), Seller Loan Number, Decision FICO, Interest Rate, Prepayment Penalty (No), PMI Coverage, MI Months, and a checkbox for Lender Paid Mortgage. A green square icon with a white letter 'd' is overlaid on the "Save" button.

# Registering a Non-Delegated Loan

## Option 2

- a** Click the **Manual** option.
- b** Click the **Next** button to continue.



# Registering a Non-Delegated Loan

## Option 2

- c** Complete all the loan information manually.
- d** After completing the information, click the **Register Loan** button.

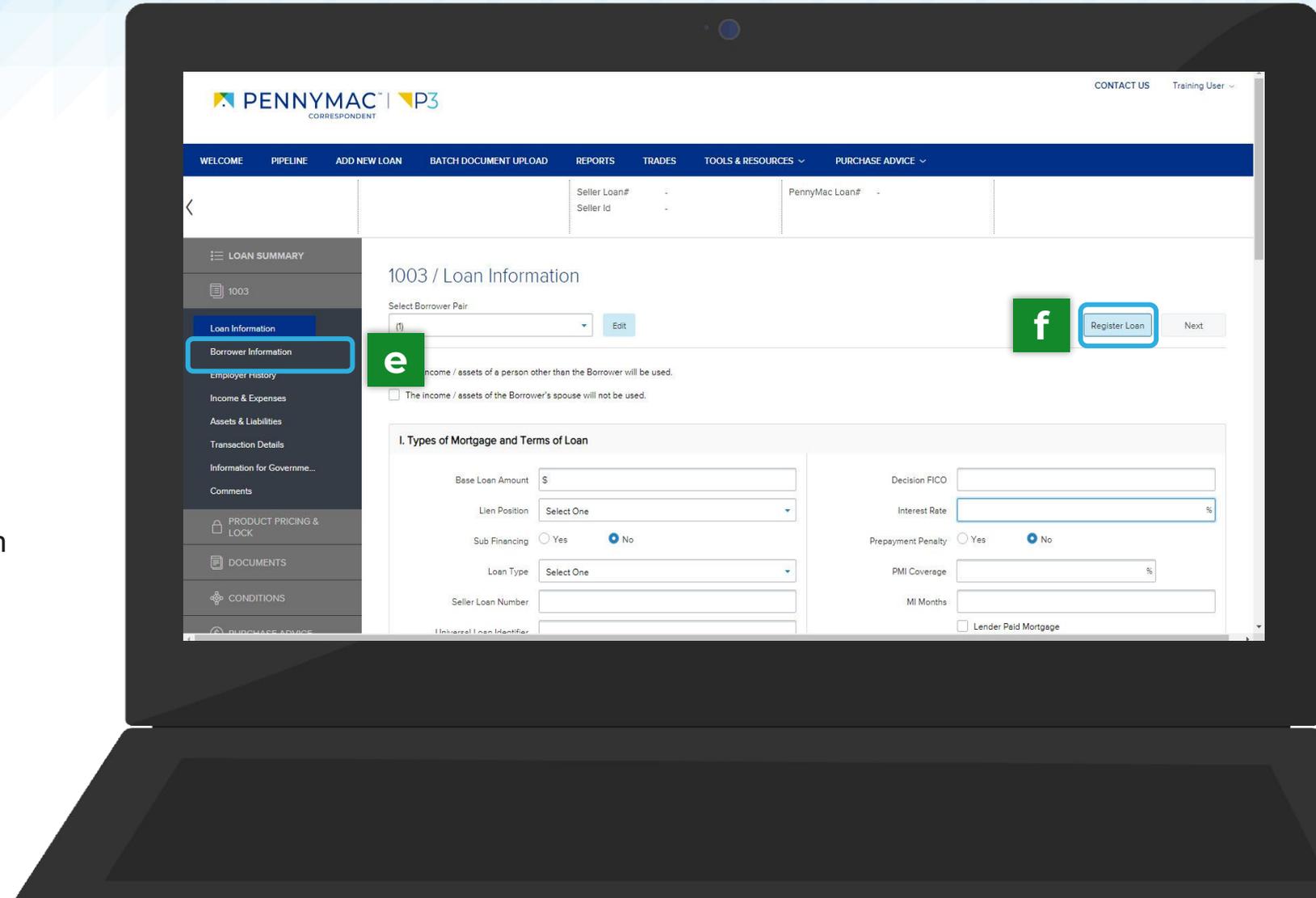
The screenshot displays the PENNYMAC CORRESPONDENT P3 web application interface. The top navigation bar includes links for WELCOME, PIPELINE, ADD NEW LOAN, BATCH DOCUMENT UPLOAD, REPORTS, TRADES, TOOLS & RESOURCES, and PURCHASE ADVICE. The main content area is titled '1003 / Loan Information' and features a sidebar with navigation options like LOAN SUMMARY, Borrower Information, and DOCUMENTS. The form includes fields for Seller Loan#, Seller Id, and PennyMac Loan#. A 'Select Borrower Pair' dropdown is set to '(f)'. Below this, there are checkboxes for income/asset declarations. The 'I. Types of Mortgage and Terms of Loan' section contains fields for Base Loan Amount, Lien Position, Sub Financing, Loan Type, Seller Loan Number, Decision FICO, Interest Rate, Prepayment Penalty, PMI Coverage, and MI Months. A 'Register Loan' button is highlighted with a red box and a red 'd' marker, indicating the final step in the process.

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## Option 2

**e** Additional information that has not been added in the creation process can be added by clicking **1003** in the left menu, for example, to add borrower information.

**f** When the information is completed, click the **Register Loan** button.



**THANK  
YOU!**

