

Client Readiness Training

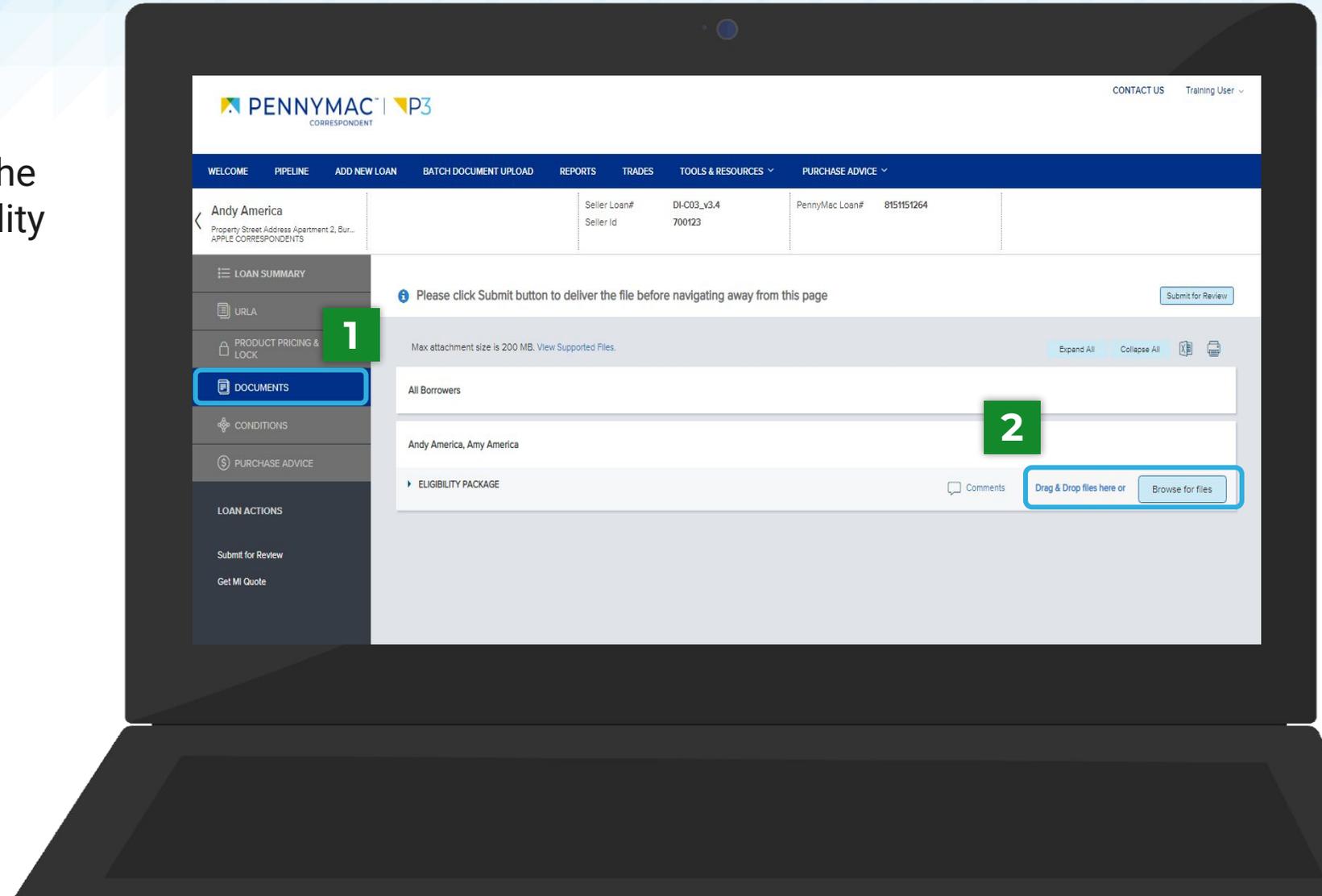
Non Delegated Loan Processing

▶ Upload Eligibility Package

Upload Eligibility Package

Once a loan has been registered, the loan has to be submitted to Eligibility Review with its appropriate documentation.

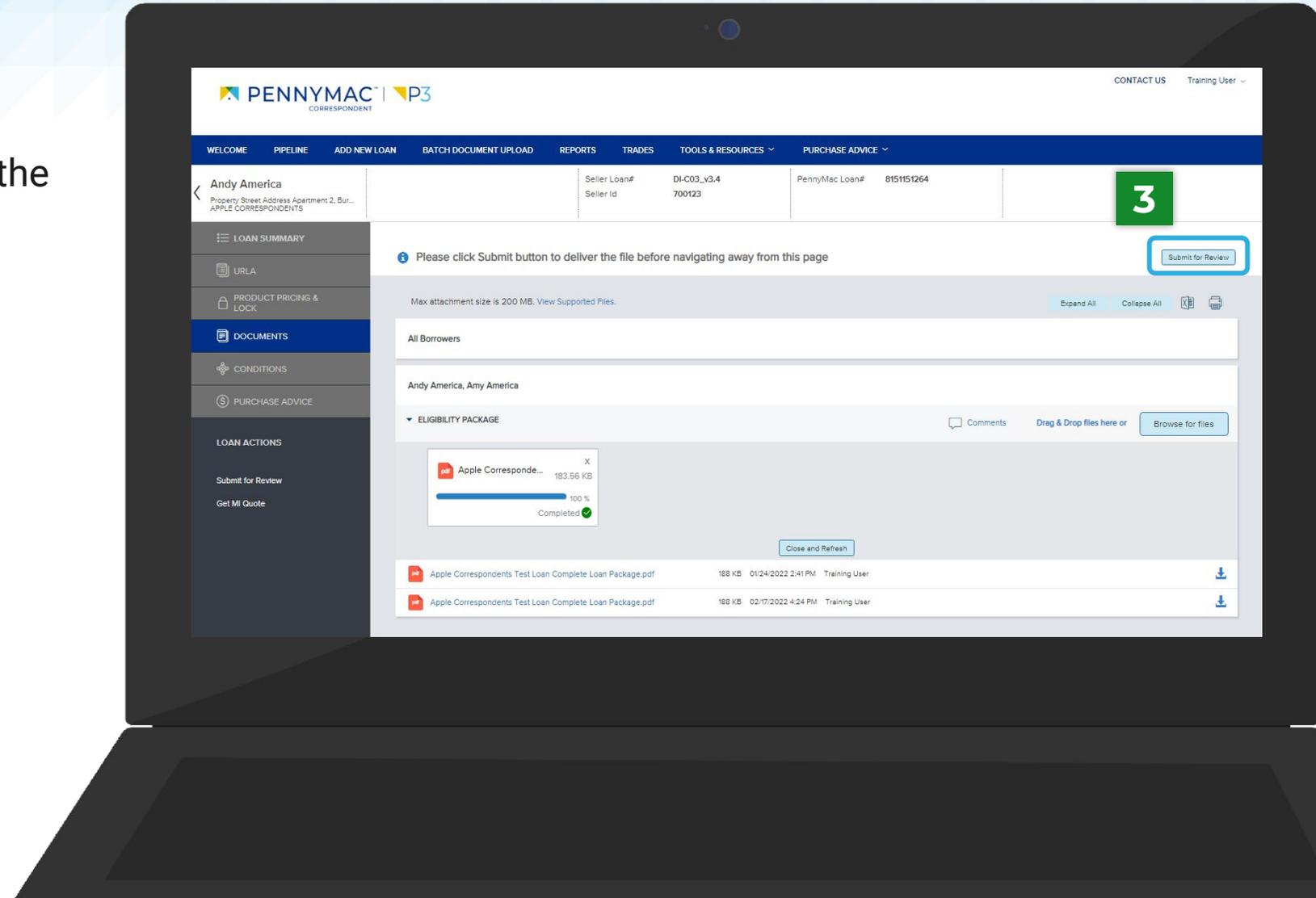
- 1** Go to the Documents section of the loan.
- 2** Upload documents using the **Drag & Drop files** option or **Browse for files** for selecting files saved in the computer.



Upload Eligibility Package

Once the uploading is completed, the uploaded document appears as Completed in the screen.

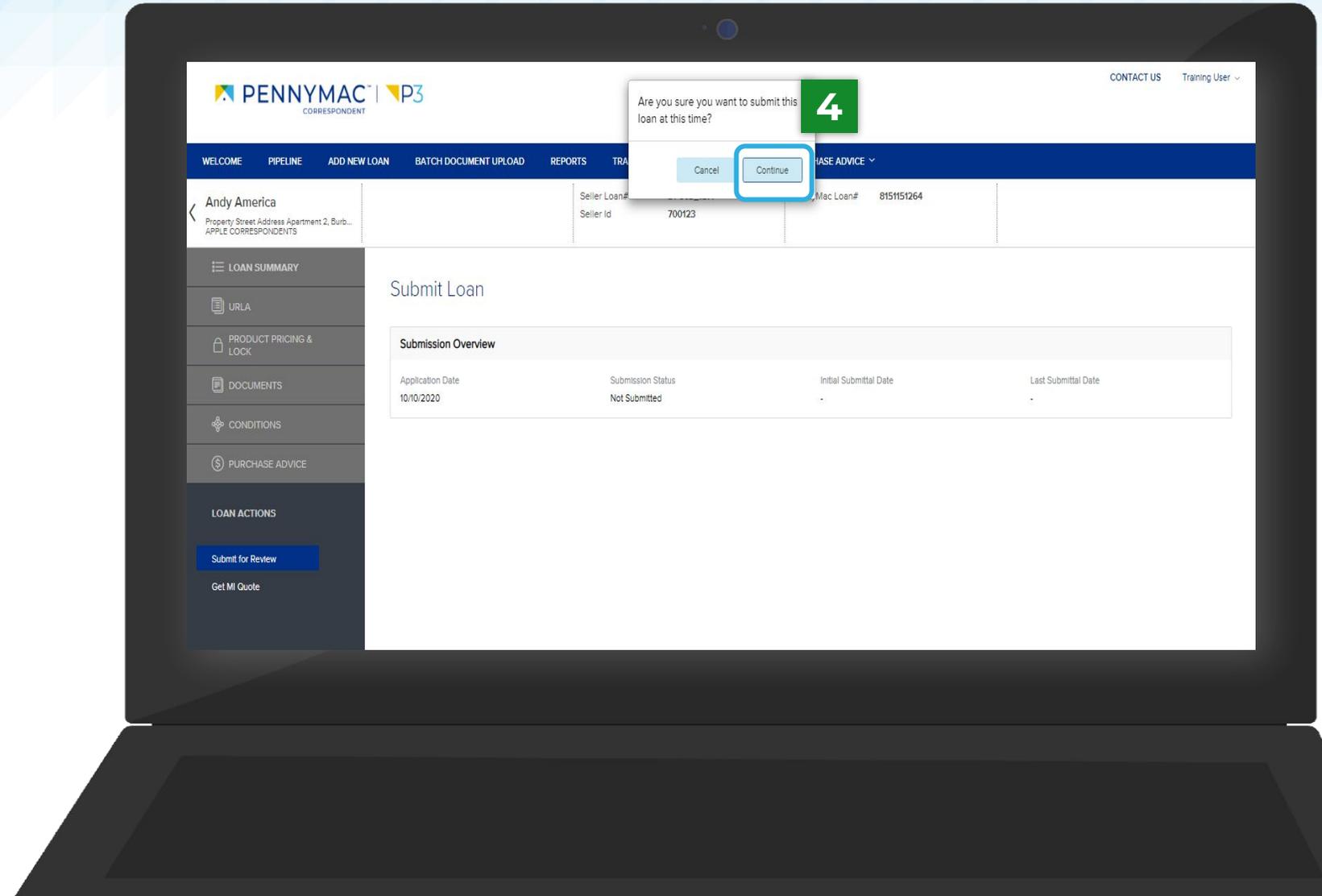
3 Click the Submit for review button.



Upload Eligibility Package

4 A submission overview page pops-up to review the loan. Click **Continue** to confirm the loan submission.

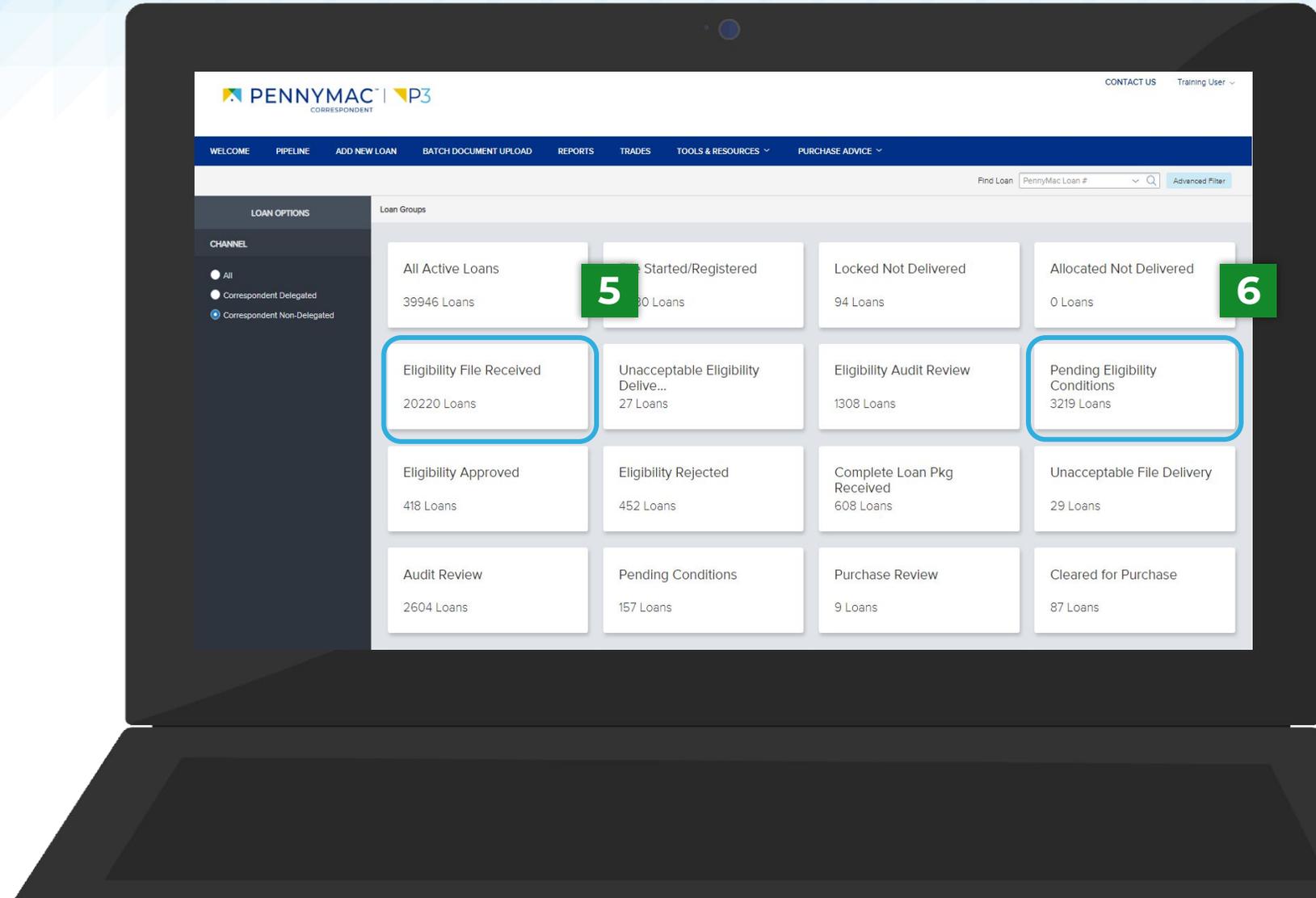
i Now the loan is in the queue for PennyMac to review and all the editing options will be disabled.



Upload Eligibility Package

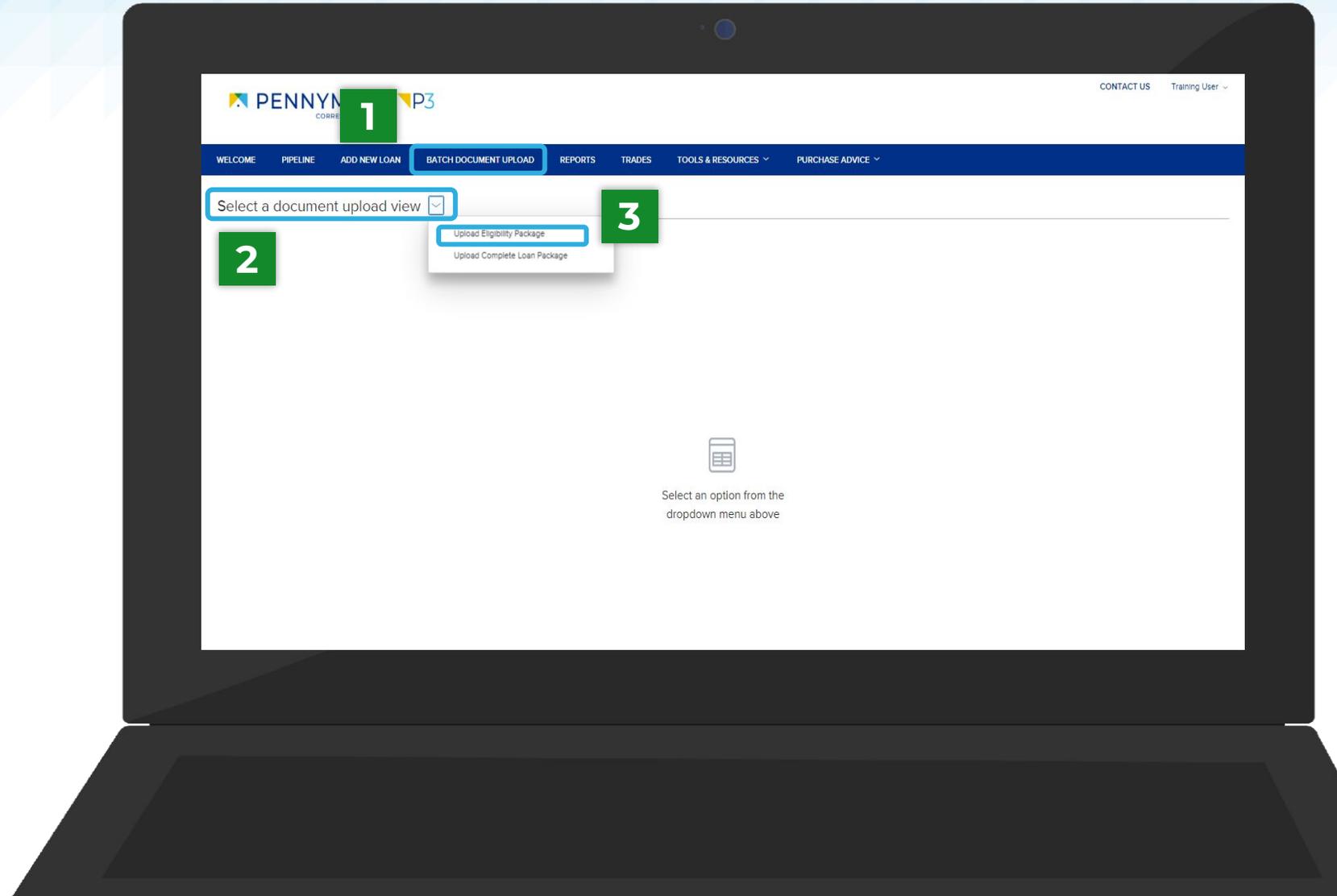
5 When PennyMac receives the loan, it appears in the **Eligibility File Received** tile in the pipeline.

6 If PennyMac decides that additional documentation is needed, this is notified by email (if configured correctly) and the loan will appear in the **Pending Eligibility Conditions** tile.



Upload Eligibility Package

- 1** Go to the *Batch Document Upload* tab.
- 2** Click the **Select a Document Upload View** drop-down menu.
- 3** Select the **Upload Eligibility Package** option.



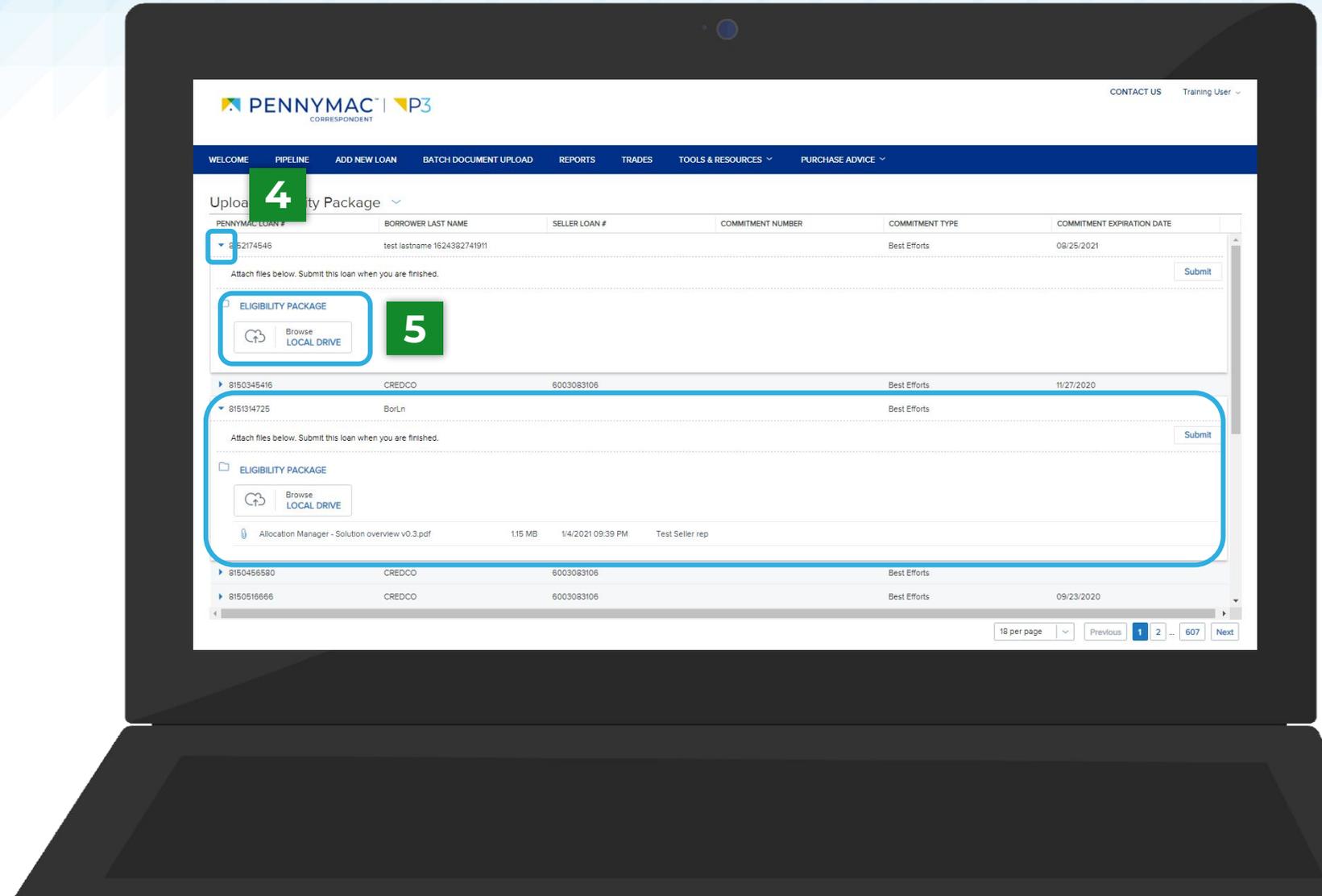
Upload Eligibility Package

4 Find the loan in the list and click on the arrow at the left of the loan line.

5 Click the **Browse LOCAL DRIVE** button 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 loans packages can be completed repeating these steps for different loans



Upload Eligibility Package

6 After uploading the file, click the **Submit** button.

With this last step the Uploading Eligibility package is completed!



A green notification will pop-up to confirm the loan has been submitted.

The screenshot displays the 'Upload Eligibility Package' section of the PENNYMAC CORRESPONDENT P3 application. The interface features a table with the following columns: PENNYMAC LOAN #, BORROWER LAST NAME, SELLER LOAN #, COMMITMENT NUMBER, COMMITMENT TYPE, and COMMITMENT EXPIRATION DATE. The table contains several rows of loan data. Below the table, there are sections for attaching files and uploading an eligibility package, with a 'Submit' button highlighted in a blue box. A green notification box with the number '6' is overlaid on the right side of the interface.

PENNYMAC LOAN #	BORROWER LAST NAME	SELLER LOAN #	COMMITMENT NUMBER	COMMITMENT TYPE	COMMITMENT EXPIRATION DATE
8152174546	test lastname 1624382741911			Best Efforts	08/25/2021
8150345416	CREDCO	6003083106		Best Efforts	11/27/2020
8151314725	BorLn			Best Efforts	
8150456580	CREDCO	6003083106		Best Efforts	
8150516666	CREDCO	6003083106		Best Efforts	09/23/2020

**THANK
YOU!**

