PENNYMAC CORRESPONDENT | P3

Client Readiness Training

Completing Post Funding Actions

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Content

On this module, we will go over the following topics:

1. **Single post funding requests**
   Learn how to create single post funding requests.

2. **Bulk post funding requests**
   Learn how to create bulk post funding requests.

3. **Post funding request additional information**
   Understand how to add additional information to post funding requests.

MODULE DURATION
15 MINUTES

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Scenario: Completing Post Funding Actions

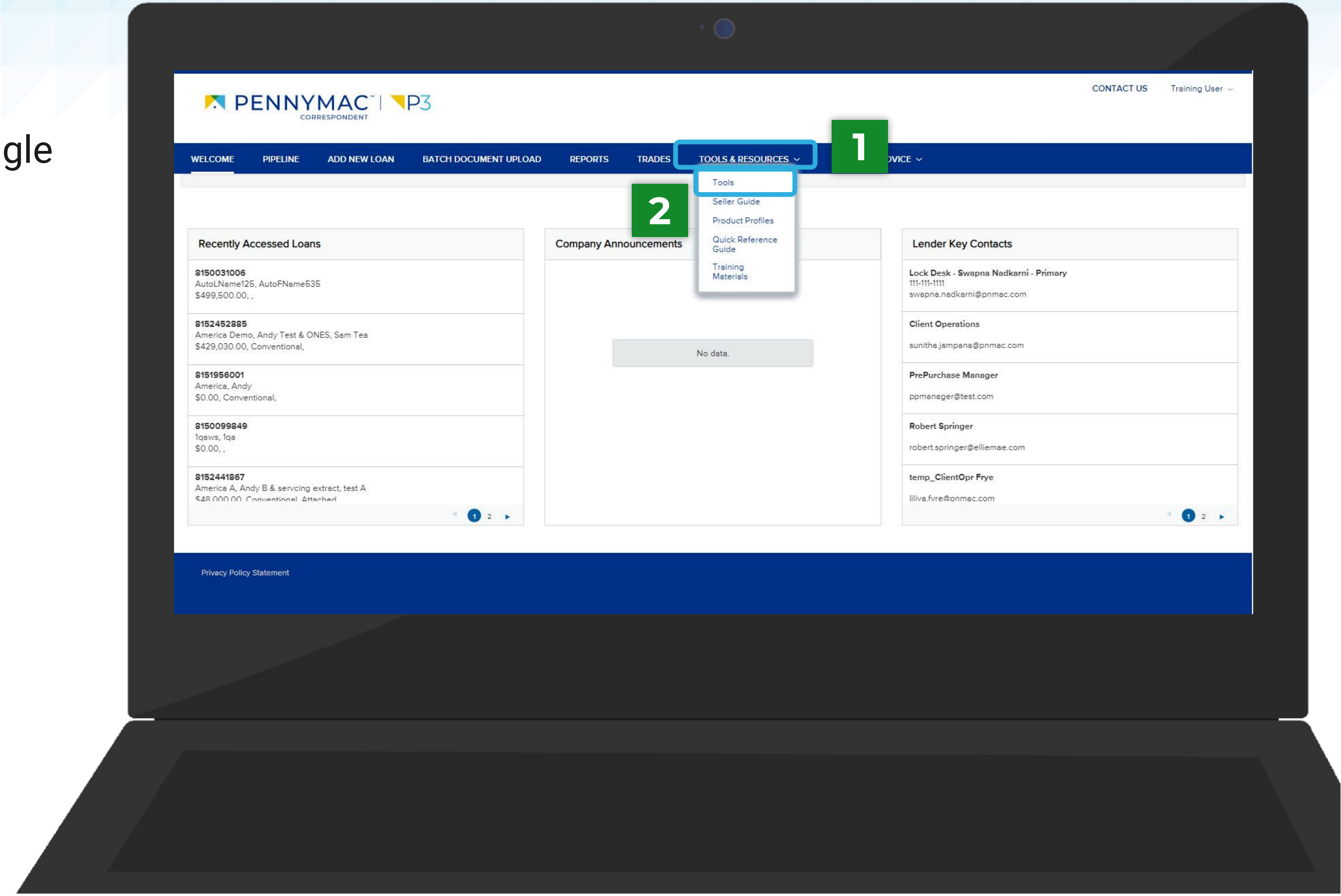
Charlie notices that his loan was not purchased for the correct price so he wants to submit a price adjustment.

Let's see how Charlie can complete this task.

Single Post Funding Requests

Single Post Funding Requests

Follow the next steps to create single post funding requests:



1 After logging into P3, go to the ***Tools & Resources*** tab.

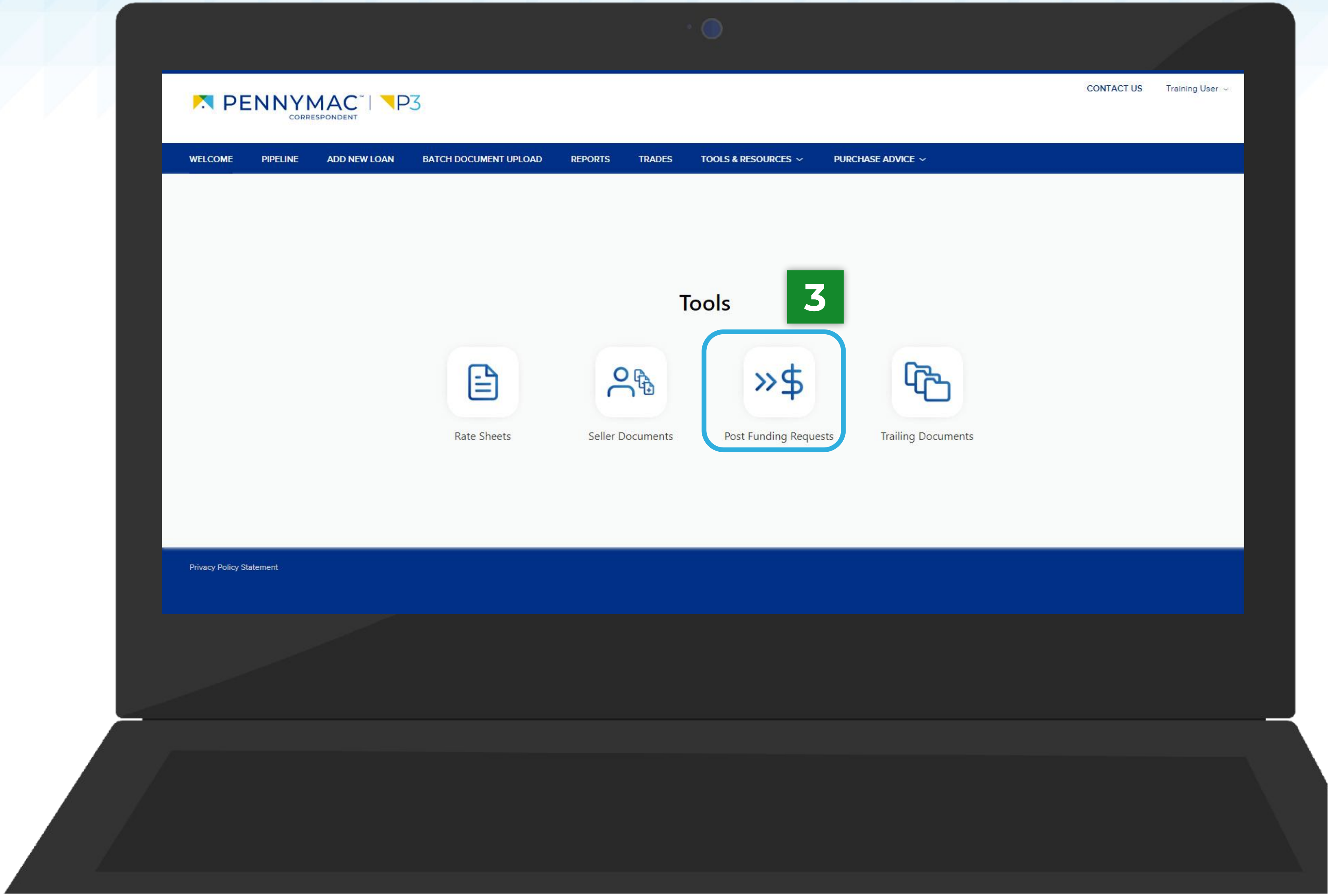
2 Once the drop-down menu displays, click on the ***Tools*** button.

Single Post Funding Requests

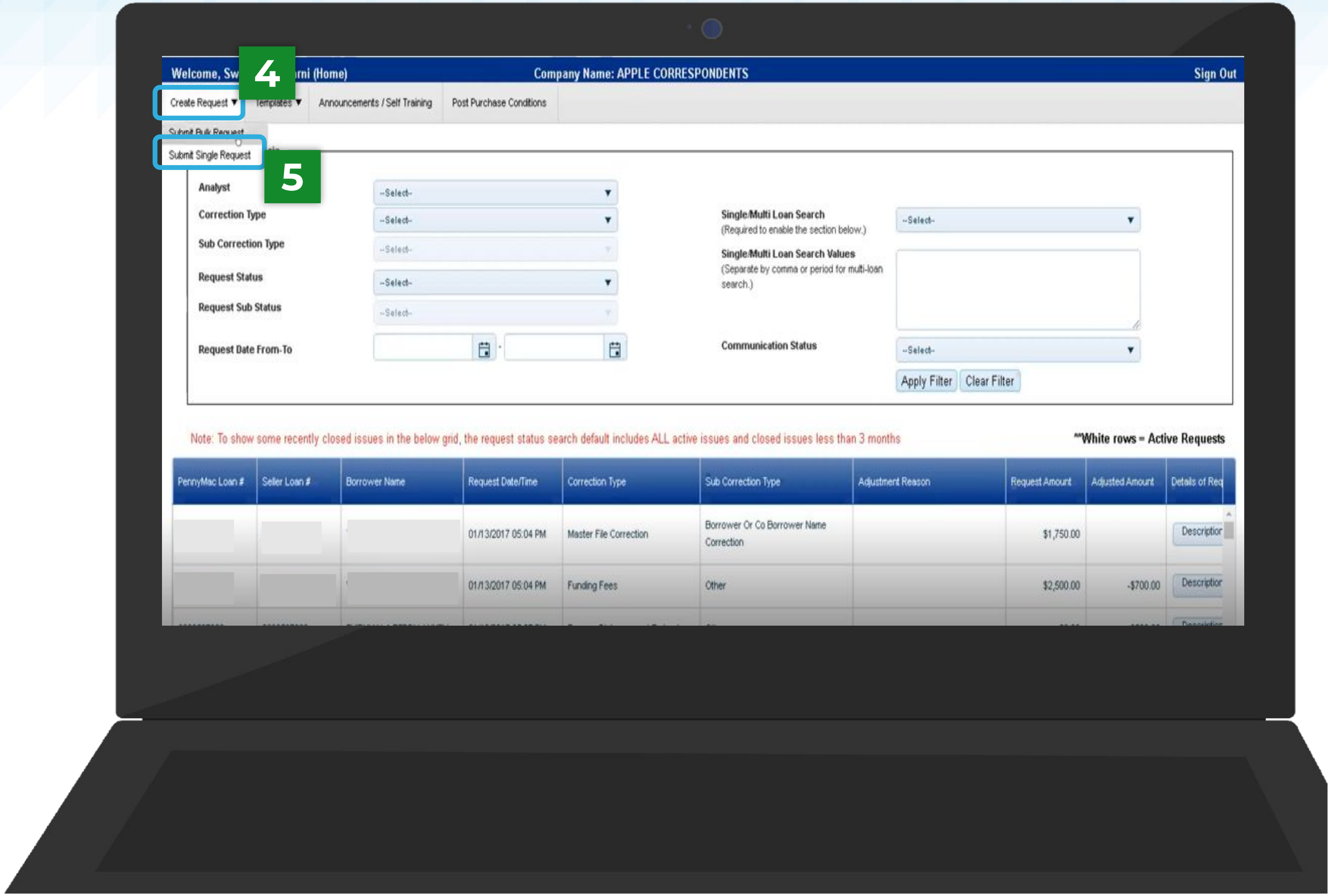
3 Click the ***Post Funding Requests*** icon.

When entering for the first time, an authentication code will be received by email. That code must be entered to access this section.

Users will only see applications they have been granted access to by their administrators via their user personas.



Single Post Funding Requests



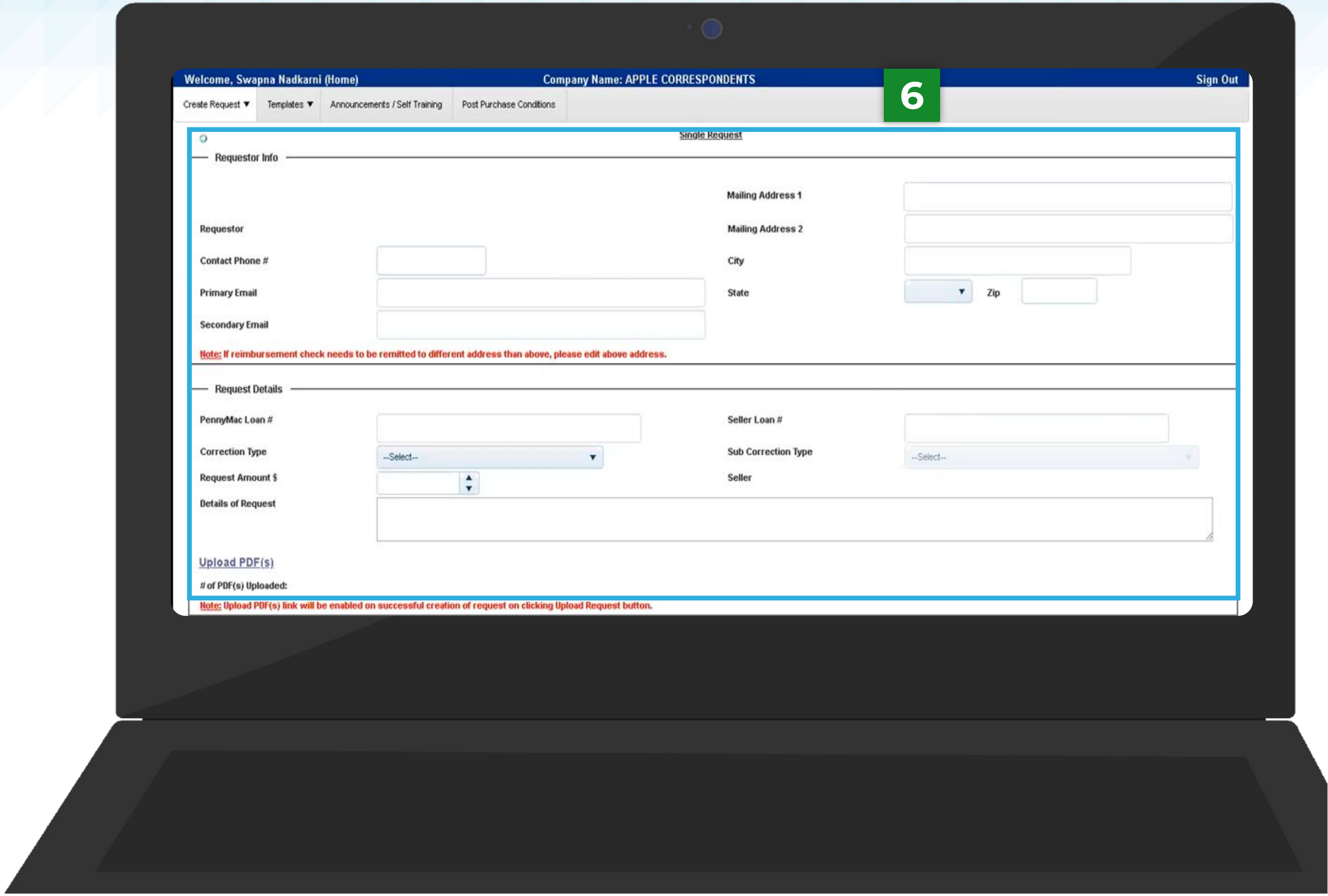
4 Click the ***Create Request*** button.

5 Once the drop-down menu displays, click the ***Submit Single Request*** button.

Single Post Funding Requests

6 Complete the required information:

- Contact Phone Number
- Primary Email
- Mailing Address
- City
- State
- Zip Code
- PennyMac Loan #
- Correction Type
- Request Amount
- Details of requests
- Sub correction type

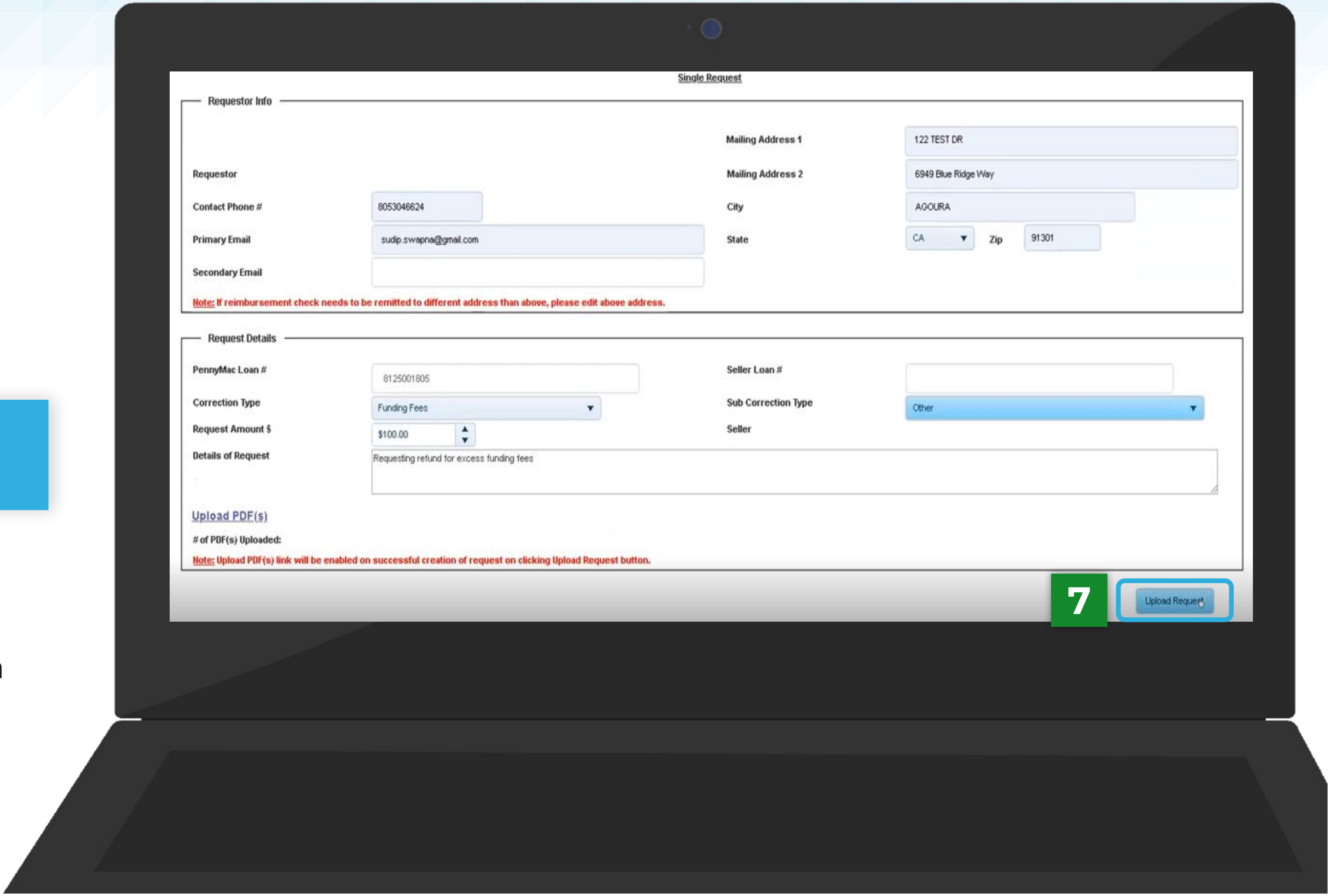


Single Post Funding Requests

7 Click the ***Upload Request*** button.

A green message will notify that the request has been successfully created

After uploading the request, supporting PDF documentation can be uploaded via the Upload PDF(s) link.

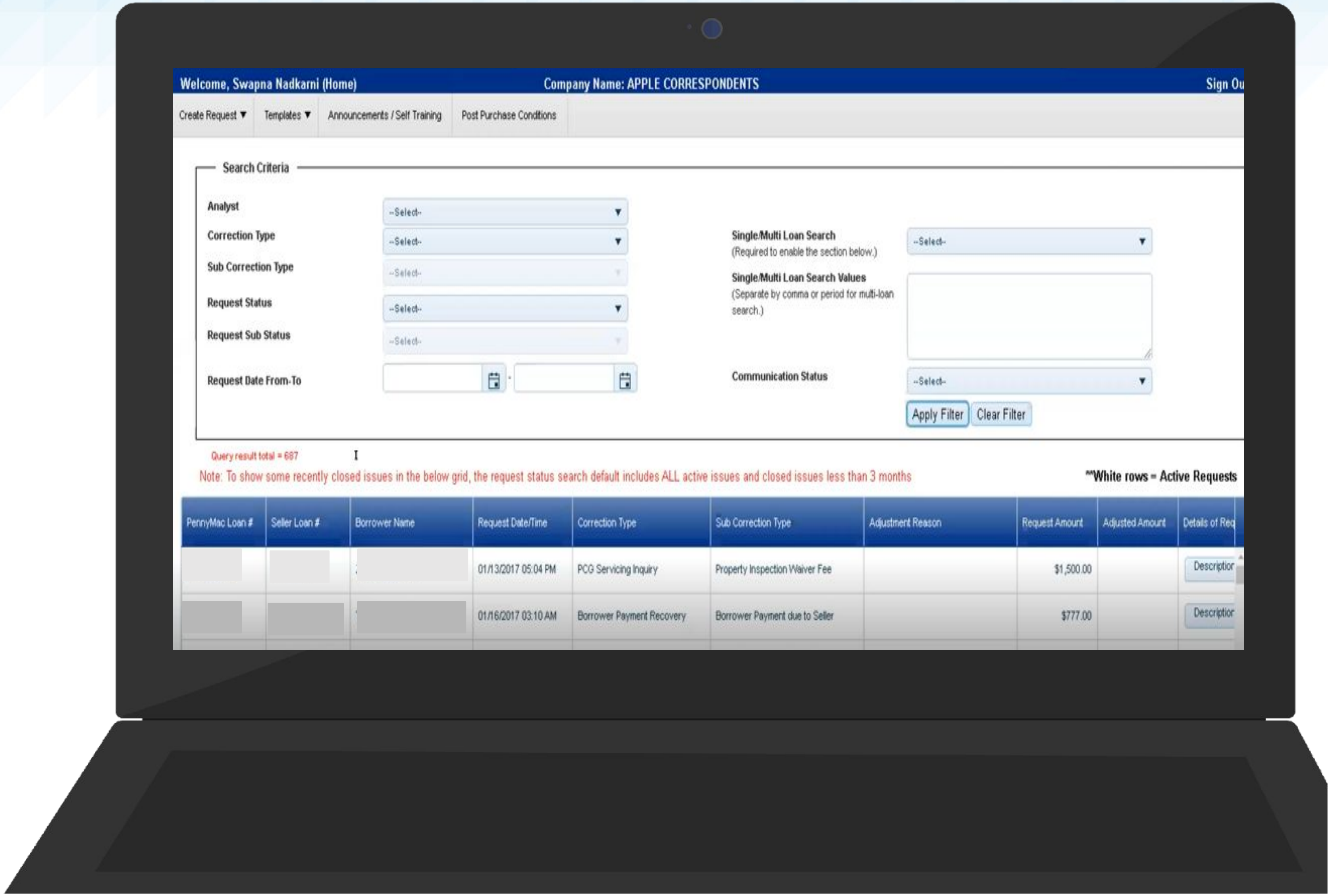


Single Post Funding Requests

Any created requests can be seen in the table at the bottom of the ***Post Funding Requests*** main page.

The search criteria section above the requests table will be helpful when looking for specific requests.

Requestor information can be found by clicking the ***Details*** in the Requester Details column.



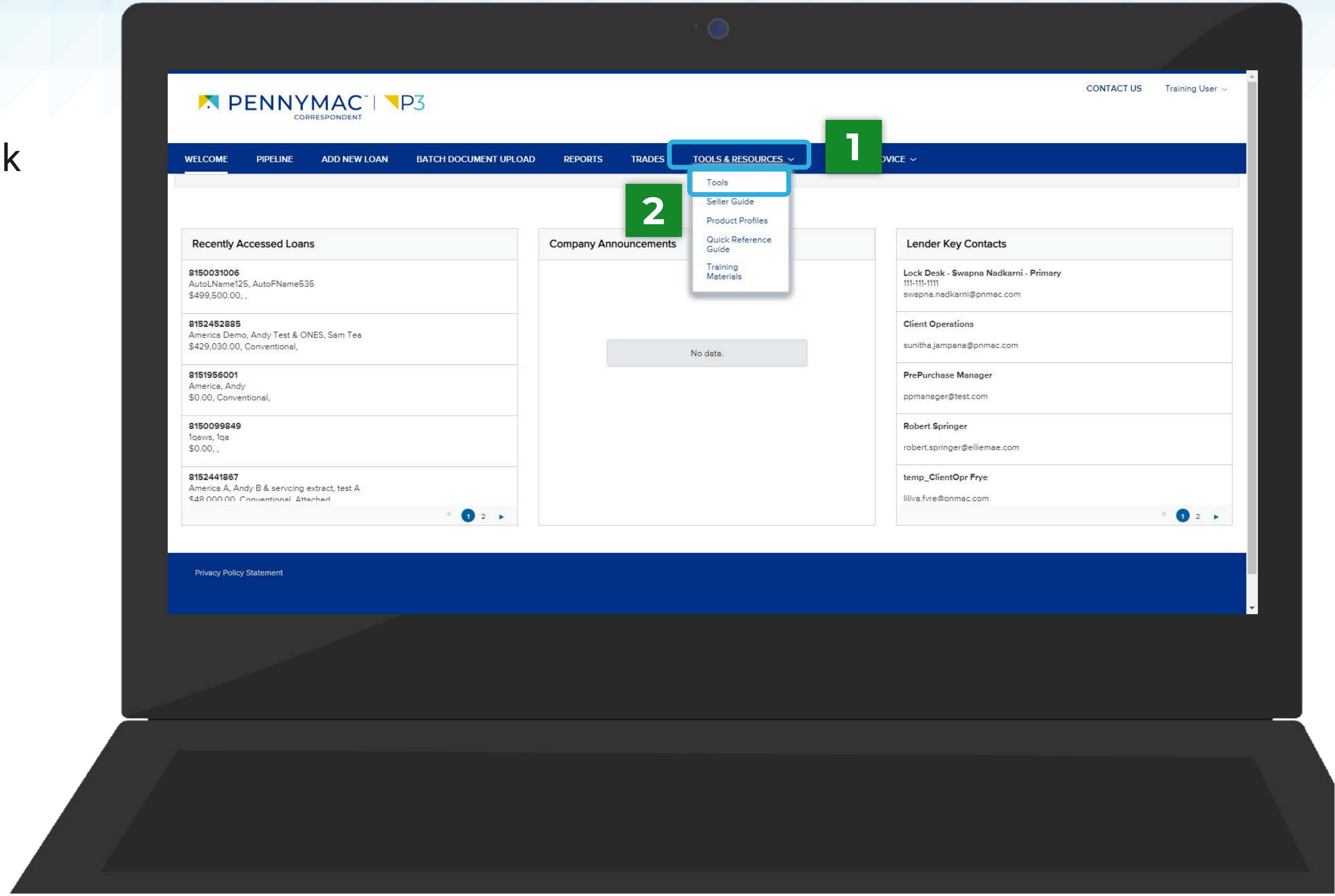
Bulk Post Funding Requests

Bulk Post Funding Requests

Follow the next steps to create bulk post funding requests:

1 Go to the ***Tools & Resources*** tab.

2 Once the drop-down menu displays, click on the ***Tools*** button.



Bulk Post Funding Requests

3 Click the ***Post Funding Requests*** icon.

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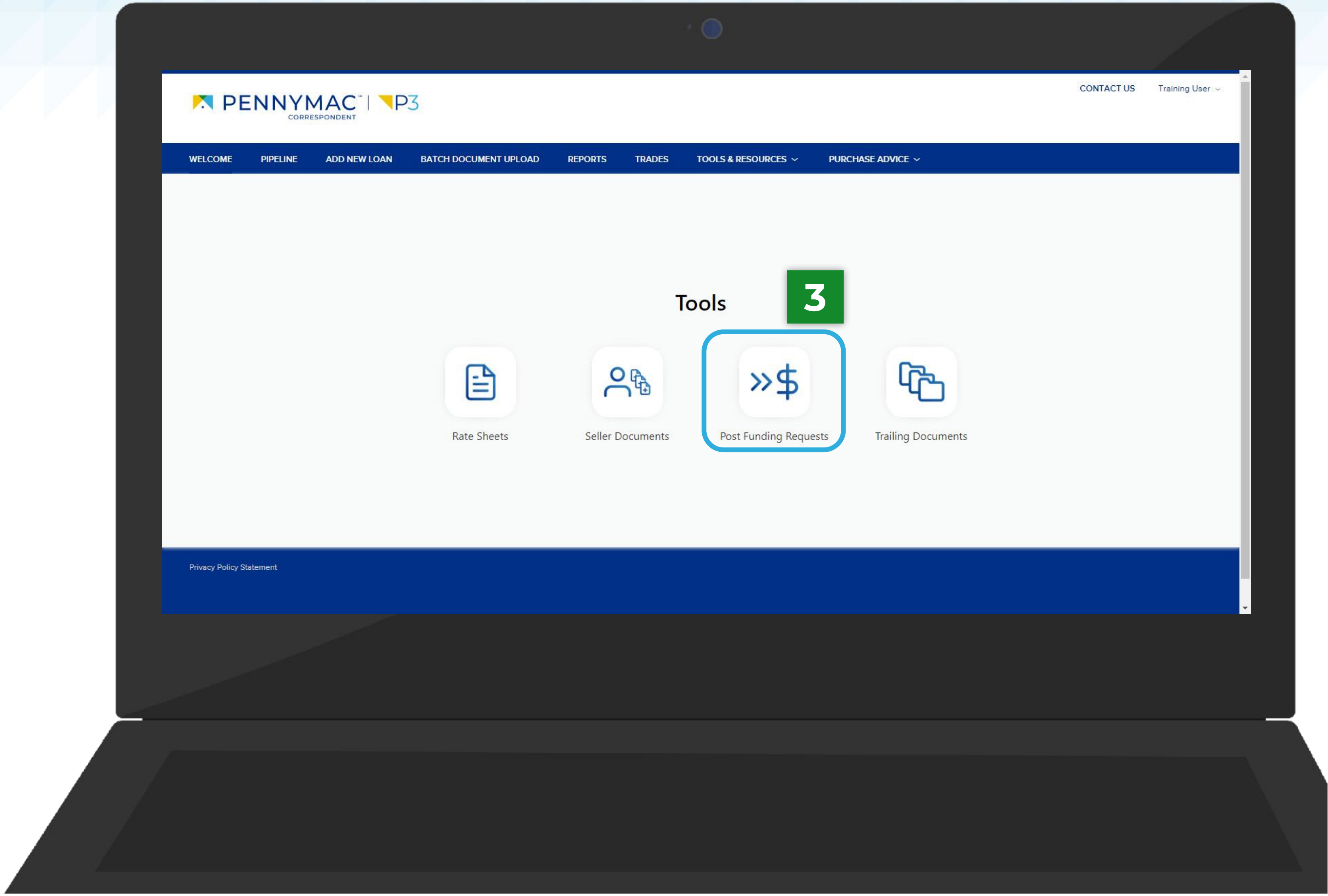
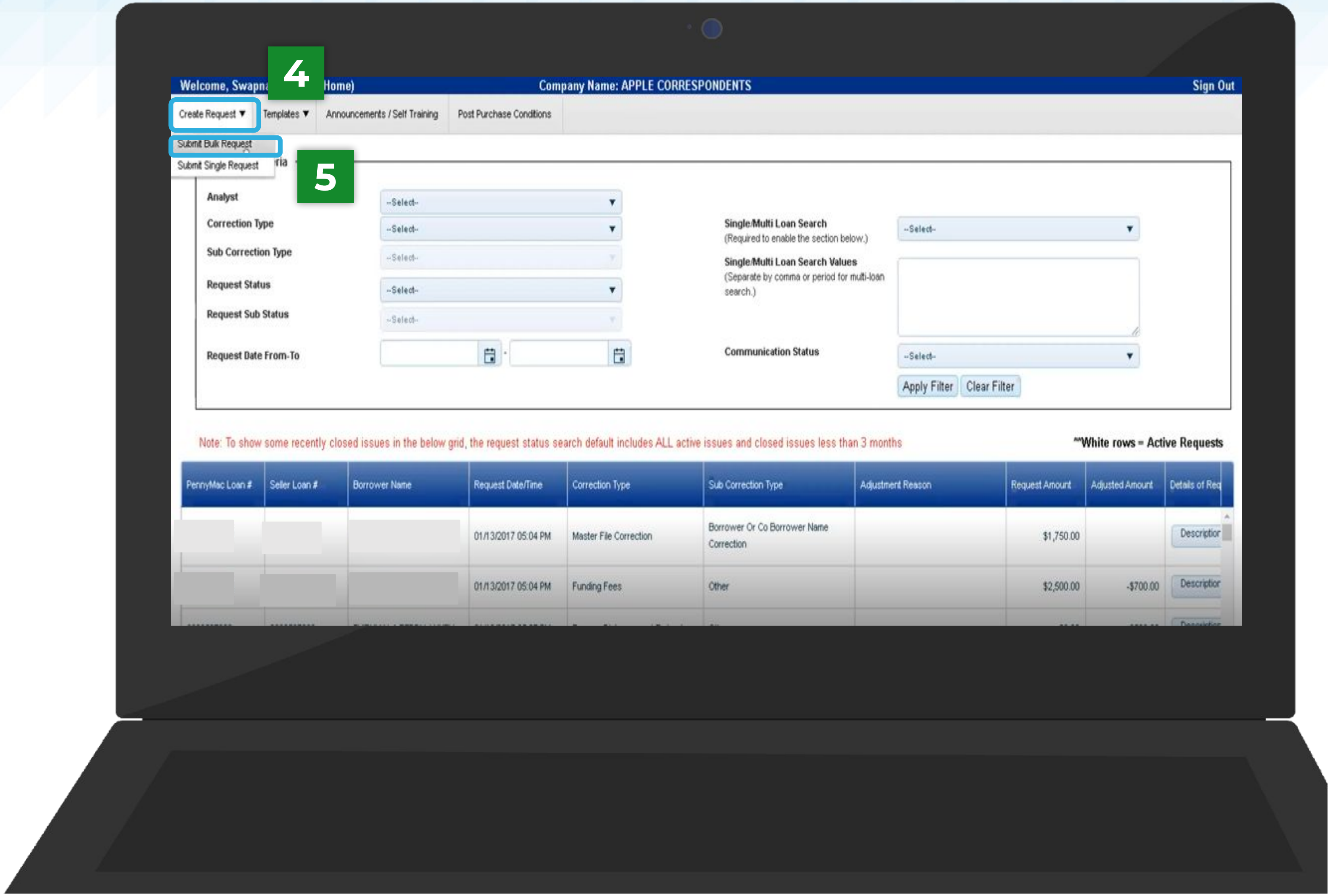
Users will only see applications they have been granted access to by their administrators via their user personas.



Bulk Post Funding Requests



4 Click the ***Create Request*** button.

5 Once the drop-down menu displays, click the ***Submit Bulk Request*** button.

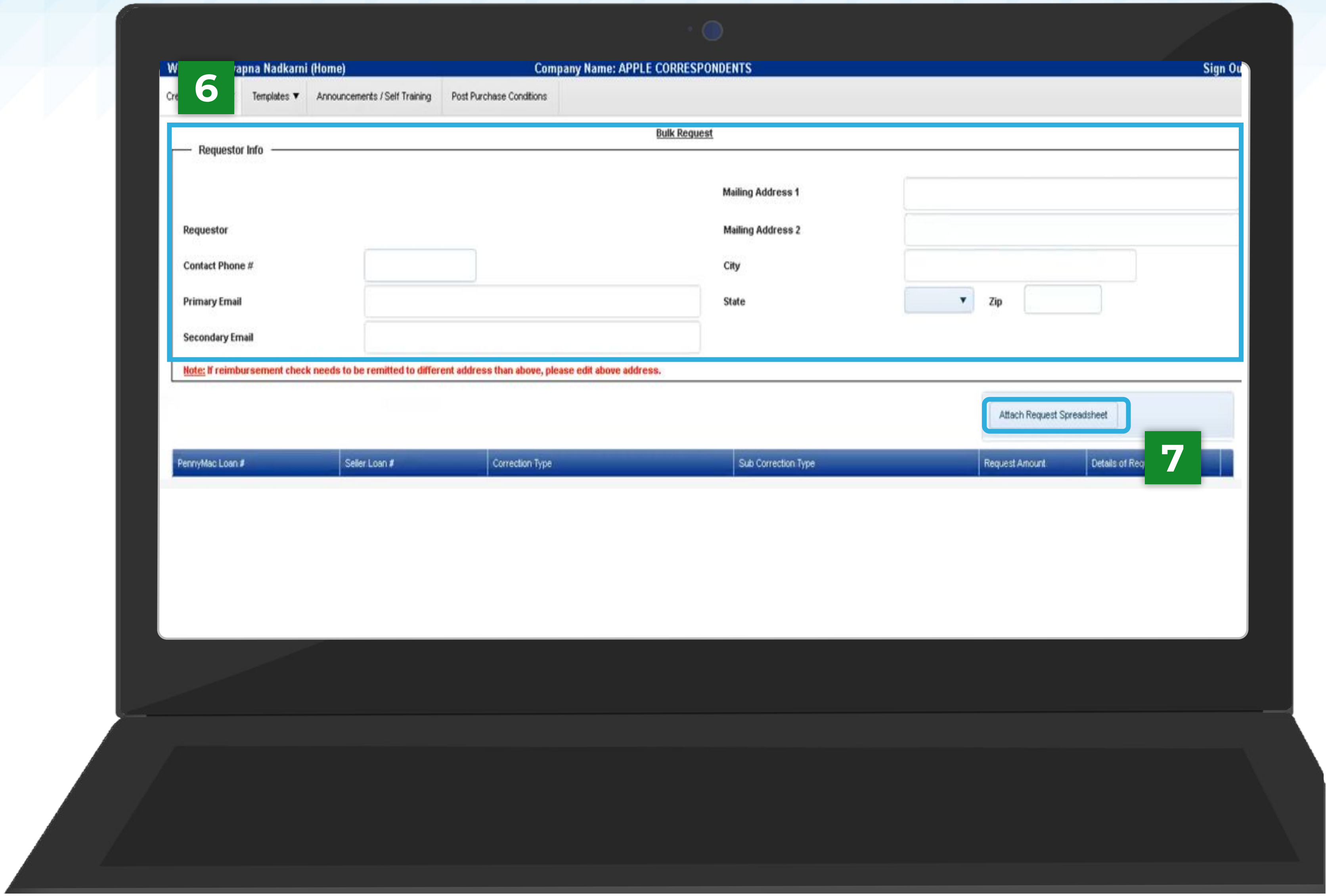
Bulk Post Funding Requests

6 Complete the required information:

- Contact Phone Number
- Primary Email
- Mailing Address
- City
- State
- Zip Code

7 Click the ***Attach Request Spreadsheet*** button to upload a completed Bulk Post Funding spreadsheet.

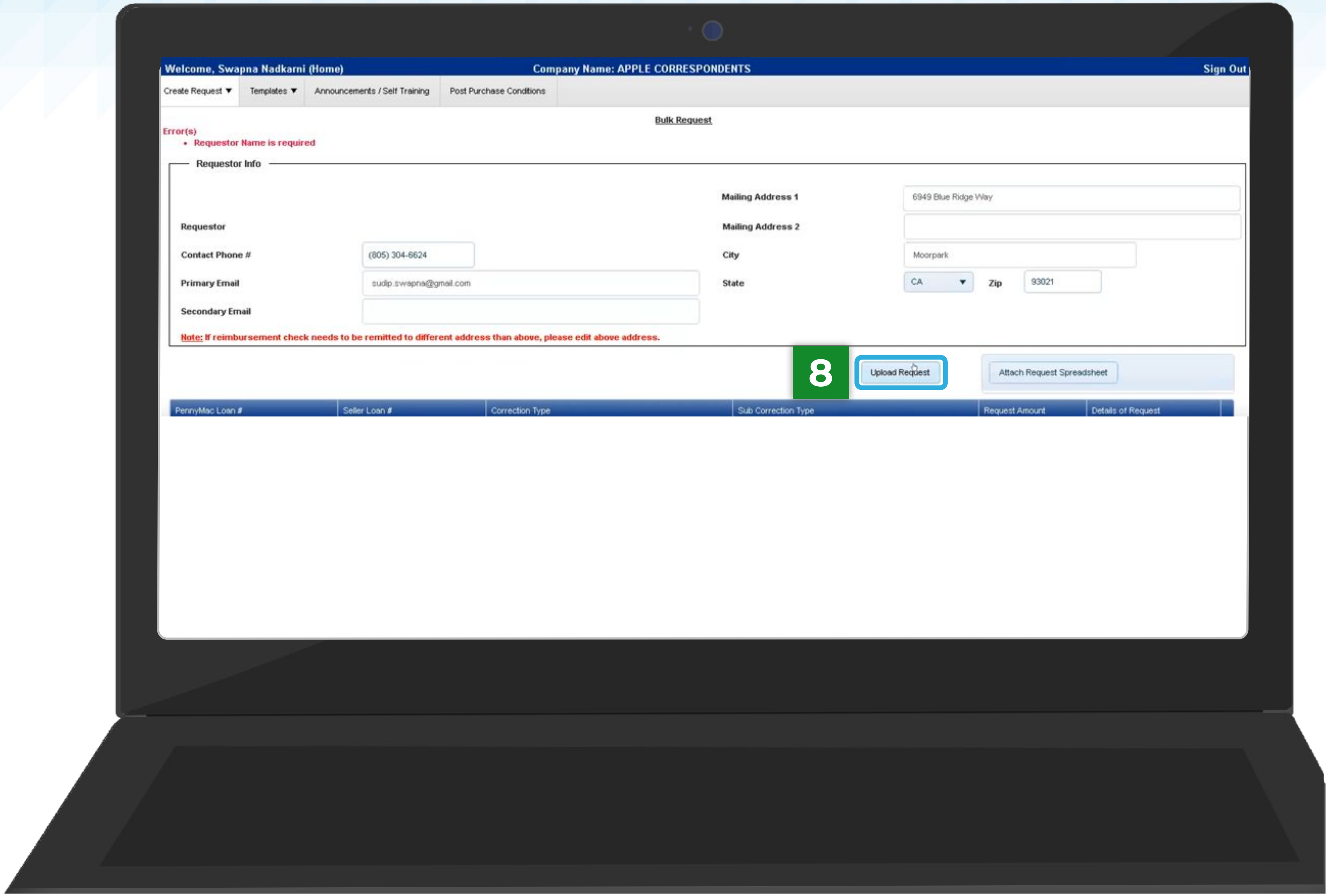
Request spreadsheet can be found under the ***Template*** tab.



Bulk Post Funding Requests

8 Click the ***Upload Request*** button

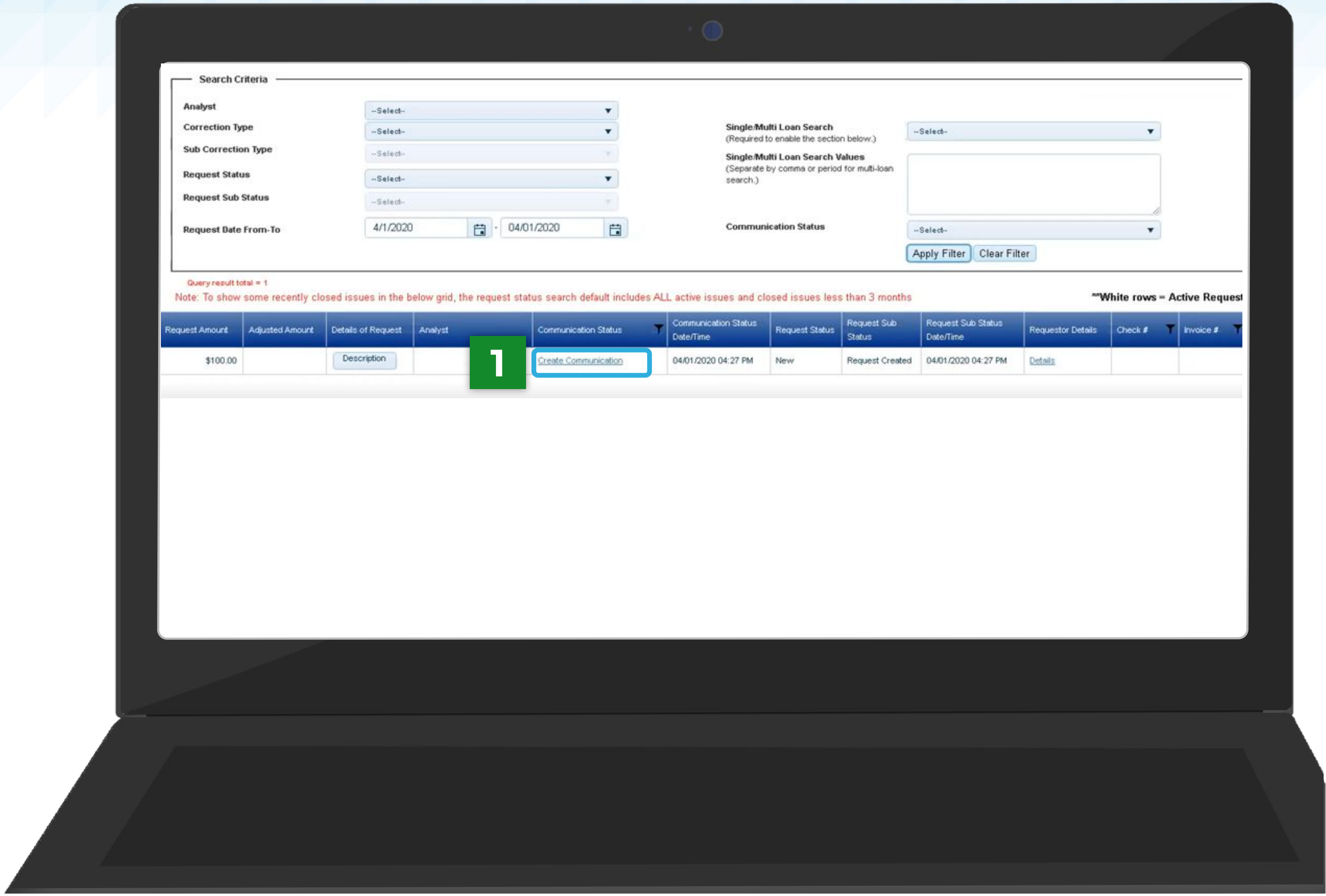
With these steps the creation of the request has been completed!



Post Funding Requests Additional Information

Post Funding Requests Additional Information

Follow the next steps to add additional information to a post funding request after creating it:

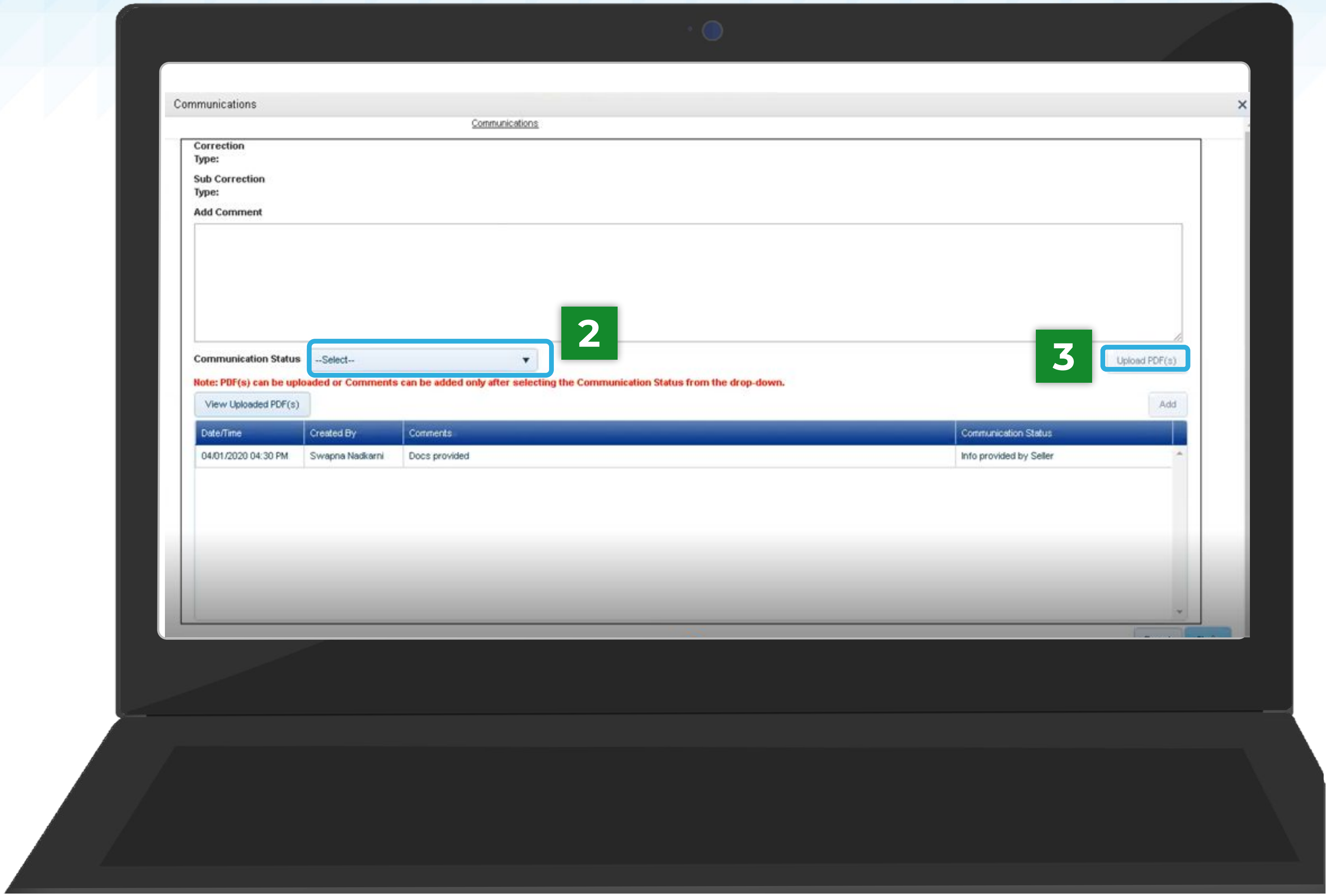


1 Click the ***Create Communication*** button under the Communication Status column for the correct request.

Post Funding Requests Additional Information

2 Pick the corresponding ***Communication Status*** from the drop-down menu.

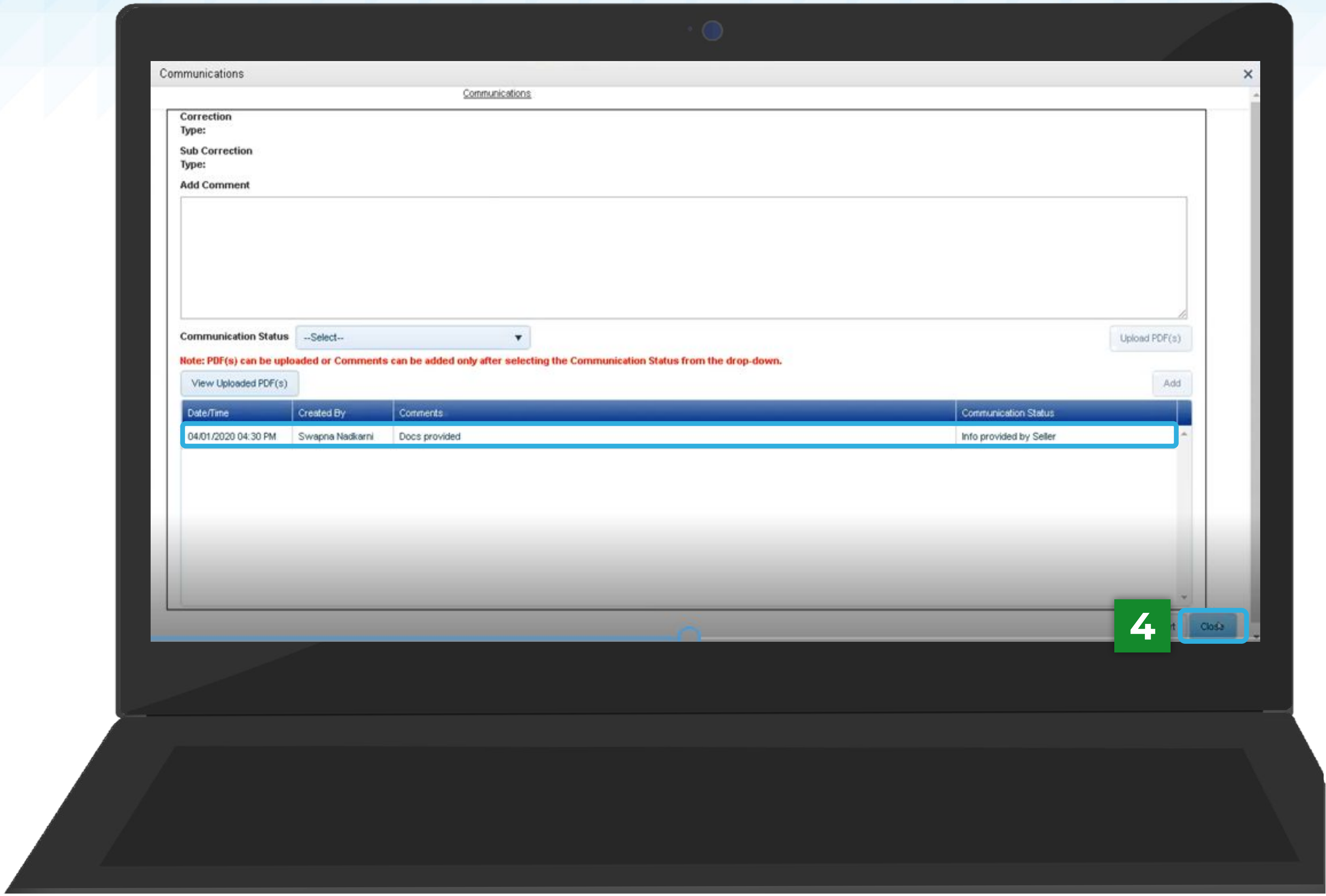
3 Click the ***Upload PDF*** button.



Post Funding Requests Additional Information

4 After selecting the document from the computer, click the ***Close*** button.

When the upload is completed, the document will appear on the screen.



Learning takeaways from this case:

- Understand the process to create single post funding requests
- Learn to create bulk post funding requests
- Learn to add additional information to requests after creating them

THANK YOU!

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