

Client Readiness Training

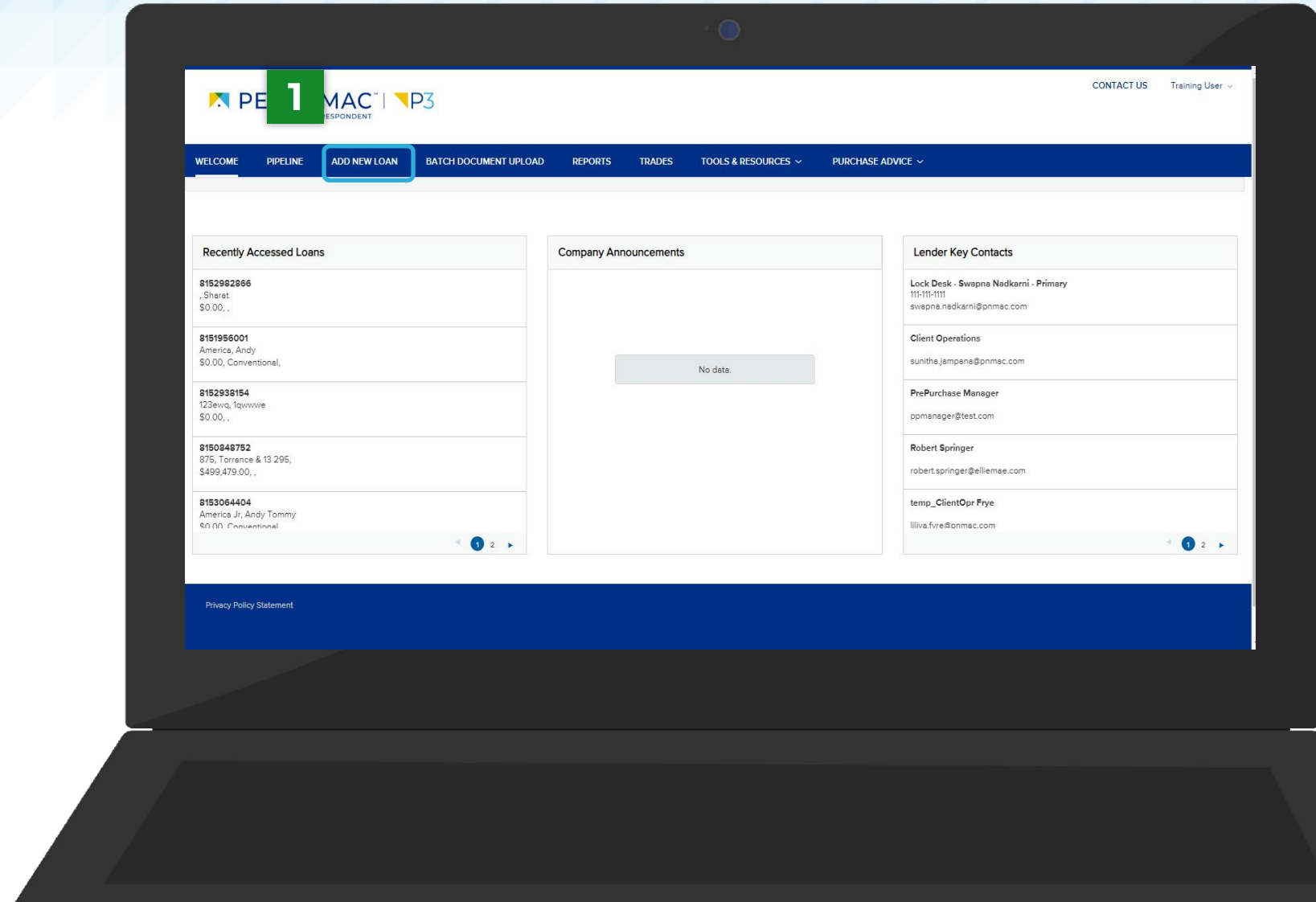
Delegated Loan Processing

Registering a Delegated Loan

Registering a Delegated Loan

Follow the next steps to register a delegated loan:

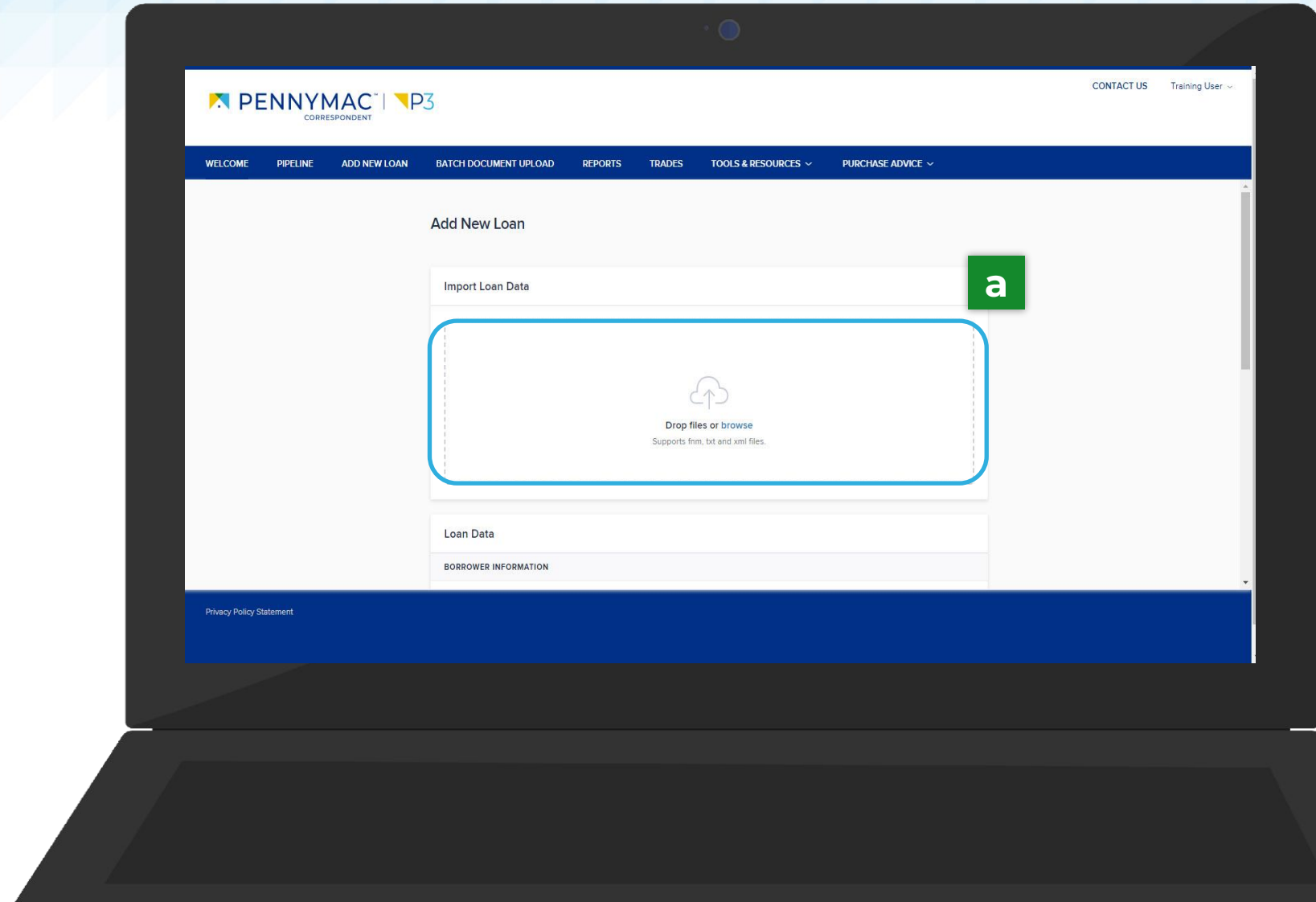
1 After logging into P3, click on the **Add New Loan** tab



Registering a Delegated Loan

2 Once in the **Add New Loan** screen there are 2 options to complete the information:

a Option a: Click **Browse** button or use the **Drag and Drop** option to upload Fannie Mae 3.2 (FNM) files. P3 extracts the information and populates the required fields.



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b Option b: complete the required fields manually:

- First Name
- Last Name
- Social Security Number
- Address
- Postal Code
- City
- State
- County
- Seller Loan Number

i The postal code automatically looks up the city, state and county. If it is associated with more than one city, it gives multiple options to select.

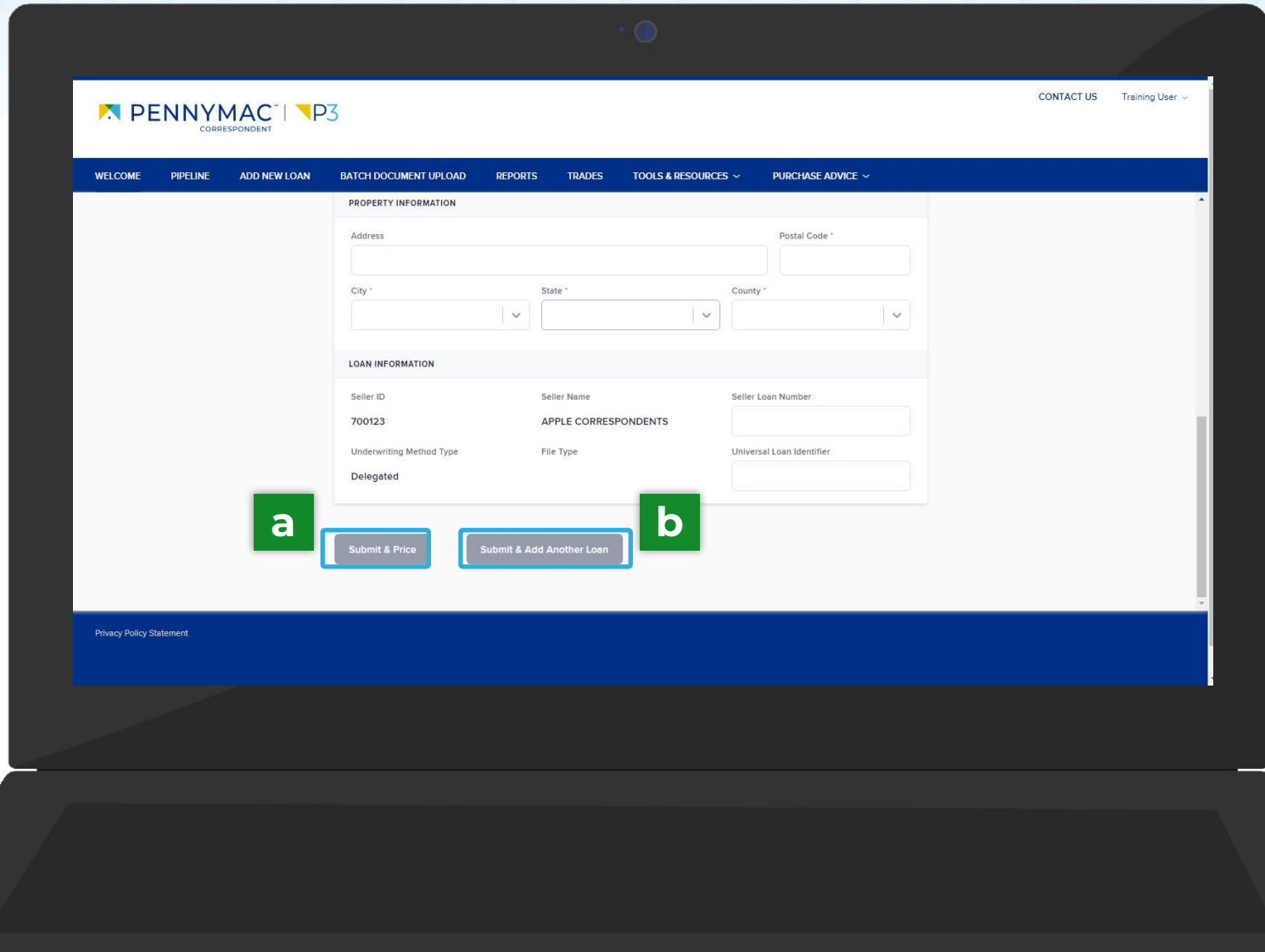
The screenshot displays the PENNYMAC P3 CORRESPONDENT interface. The top navigation bar includes links for WELCOME, PIPELINE, ADD NEW LOAN, BATCH DOCUMENT UPLOAD, REPORTS, TRADES, TOOLS & RESOURCES, and PURCHASE ADVICE. The main content area shows the 'Loan Data' form, which is highlighted with a blue border and a green box containing the letter 'b'. The form is organized into three sections: BORROWER INFORMATION, PROPERTY INFORMATION, and LOAN INFORMATION. The BORROWER INFORMATION section contains input fields for First Name, Middle, Last, Suffix, and Social Security Number. The PROPERTY INFORMATION section contains input fields for Address, Postal Code, City, State, and County. The LOAN INFORMATION section contains input fields for Seller ID (700123), Seller Name (APPLE CORRESPONDENTS), Seller Loan Number, Underwriting Method Type (Delegated), File Type, and Universal Loan Identifier.

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3 To submit the loan. There are two options of doing this:

a Option a: Click the **Submit and Price** button to save the loan and be directed to the pricing section.

b Option b: Click **Submit & Add Another Loan** button to submit the loan, save it to the pipeline and repeat the step in order to add another loan.



With **option b**, a green message notifies that the loan was successfully saved.

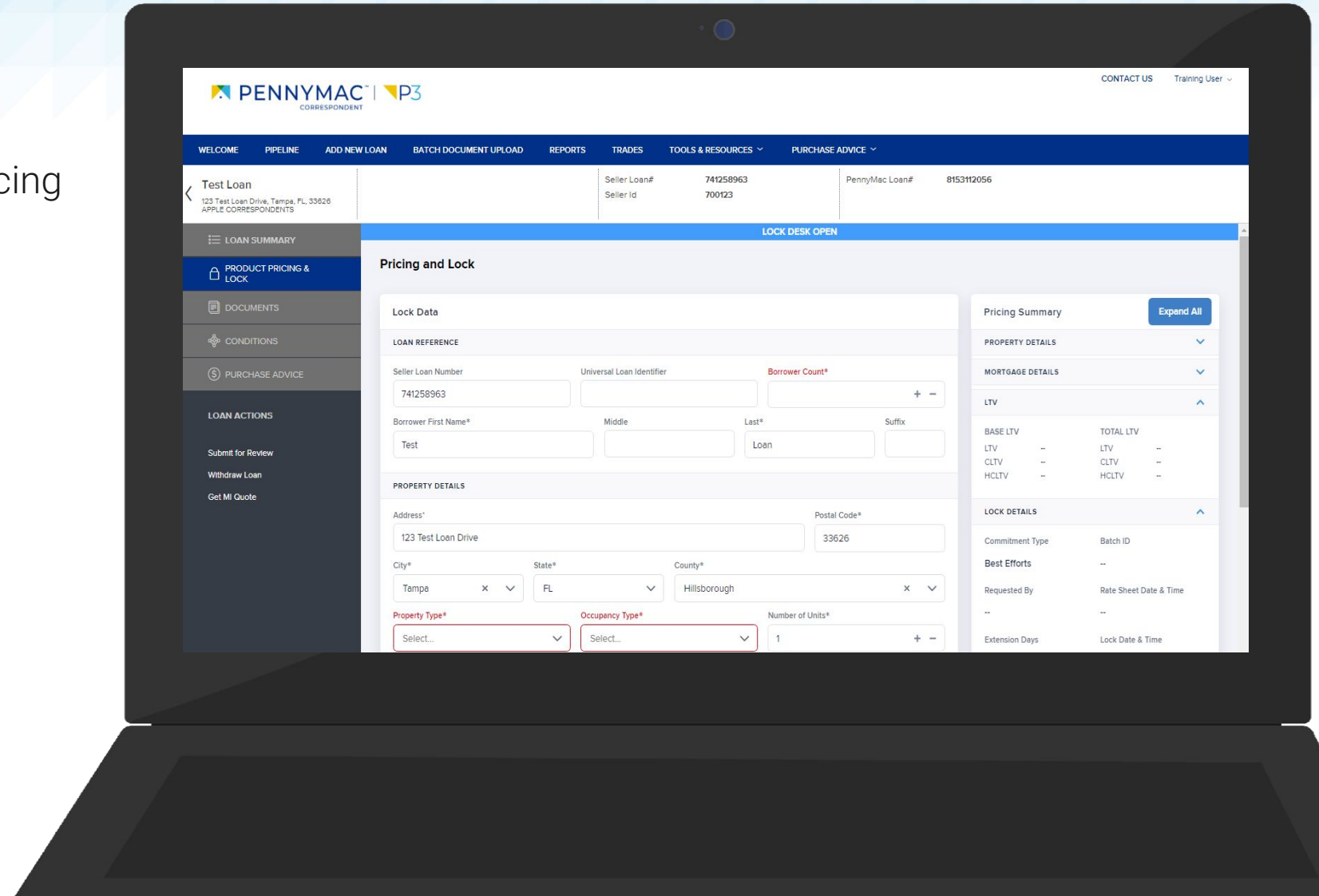
Loan 8125001967 saved successfully
Click here to Price the Loan

Complete Loan Package

Selecting Option a, the Product Pricing & Lock screen displays.



An alternative way to get to this screen is searching the created loan in the **File Started** tile in the pipeline, go into the loan, and click the **Product Pricing & Lock** tab.



**THANK
YOU!**

