

Frequently Asked Questions

Introduction

On this document, you will find some FAQs brought up during our LOS Implementation training sessions. Please refer to the material of reference provided to you, to expand on these concepts.

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Frequently Asked Questions

Introduction to Portal

1. When searching for a loan in the pipeline, if your user is delegated only, will you only see the delegated radio button?

Answer: No, by default if it is a delegated only client, there are not any radio buttons in the Pipeline section.

2. Can you search for a loan with the Seller Loan number?

Answer: Yes, on the "Find Loan" bar the user has the option to search for a loan via PennyMac Loan #, Seller Loan # or Borrower Name.

3. Can I upload ZIP files?

Answer: No, currently Zip files are not supported.

4. Does Internet Explorer work with P3?

Answer: While some of P3 functions will work in Internet Explorer, it is problematic and not supported. Please use a Chrome for best results.

Log into Portal

1. Will external clients have two separate profiles, one for the legacy system and one for P3?

Answer: Yes, the legacy portal credentials will not change and all external clients will be transitioned to P3 with new credentials.

Admin Functions

1. Is there a Portal tab to identify who the Client Admin is?

Answer: No, that information needs to be found out internally through the Lock Desk.

2. How do Client Admin Users terminate users with P3 access once it is no longer needed?

Answer: Navigate to the Company Contacts screen under Manage Account. Click View for the desired user, then edit, and change Enabled to Disabled. DO NOT delete a user (Company Contact) or else the loans they have created will no longer be accessible.

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Frequently Asked Questions


Loan Processing

1. Can a loan be withdrawn from the system or will the user have to call the desk?
Answer: No, the user still needs to call the desk.

Document Submission and Reporting

1. What happens if you have multiple packages for the same file?
Answer: The user should upload multiple files before hitting the submit button. Document submission can be done using the [Drag & Drop files](#) option or with the [Browse for files](#) option, to select files saved in the computer
2. What happens if indexing has been completed and incorrect loan data has been uploaded to the loan?
Answer: If indexing has been completed and incorrect loan data has been uploaded, the loan will get trapped in Unacceptable File Delivery. At which point, you will need to re-upload the loan file in its entirety with the correct data.
3. If the wrong document was uploaded, can it be deleted?
Answer: No, documents cannot be deleted from P3.
4. Can we pull multiple PDF Purchase Advices and be able to print them all at once instead of one at a time? Is there an ETA on this?
Answer: You will have the option to export the *individual* PDF, do a CSV export of the summary data in an excel format, or print a PDF version of the summary data. The excel and PDF will contain the detailed information of each purchase. Currently, this printing feature is not supported. There is a planned feature, but there is not an ETA at this time.
5. Do satisfied conditions remain in the conditions section after the loan is purchased?
Answer: Yes, users should be able to see the satisfied conditions even after the purchase.

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