PENNYMAC CORRESPONDENT | P3

Client Readiness Training

Non Delegated Loan Processing

Registering a Non-Delegated Loan

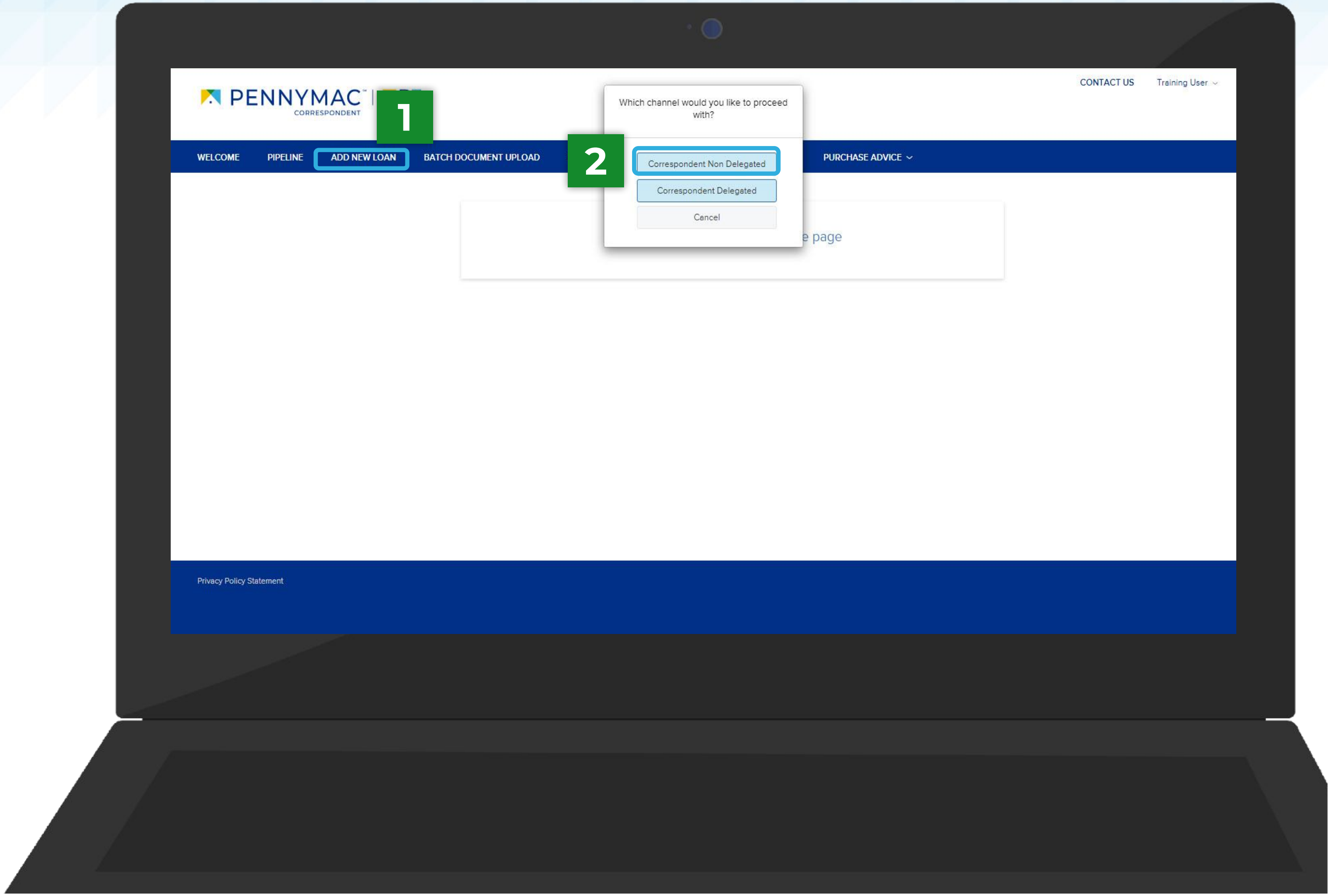
Registering a Non-Delegated Loan

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.

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

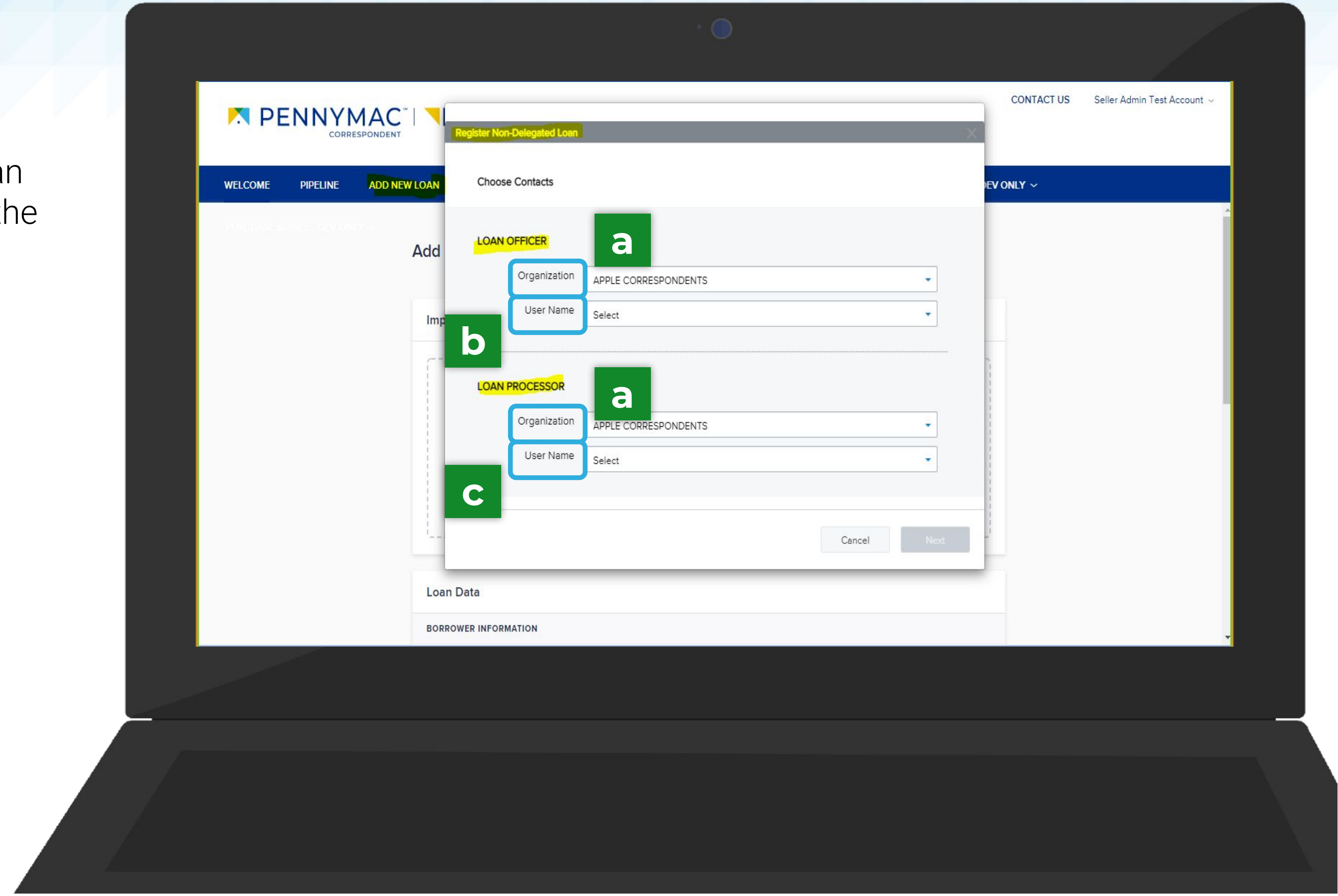
3 Once in the Register Non-Delegated Loan screen, you will see a pop-up to assign the loan to a LO / LP

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.

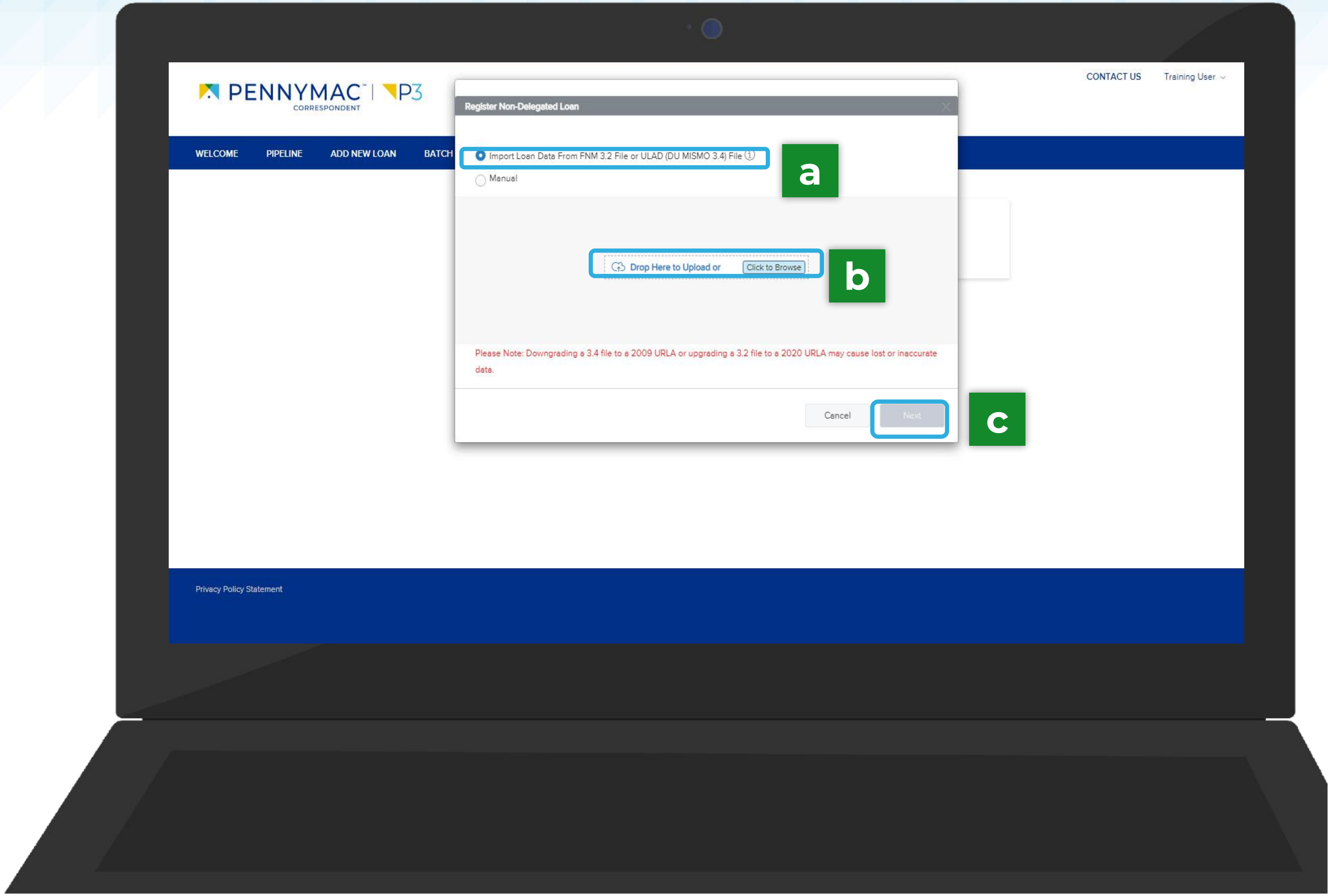
c The **UserName** (**Loan Processor**) will include the list of active external users of your company having the personas of Seller Admin, Seller Rep or Seller Processor.

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.

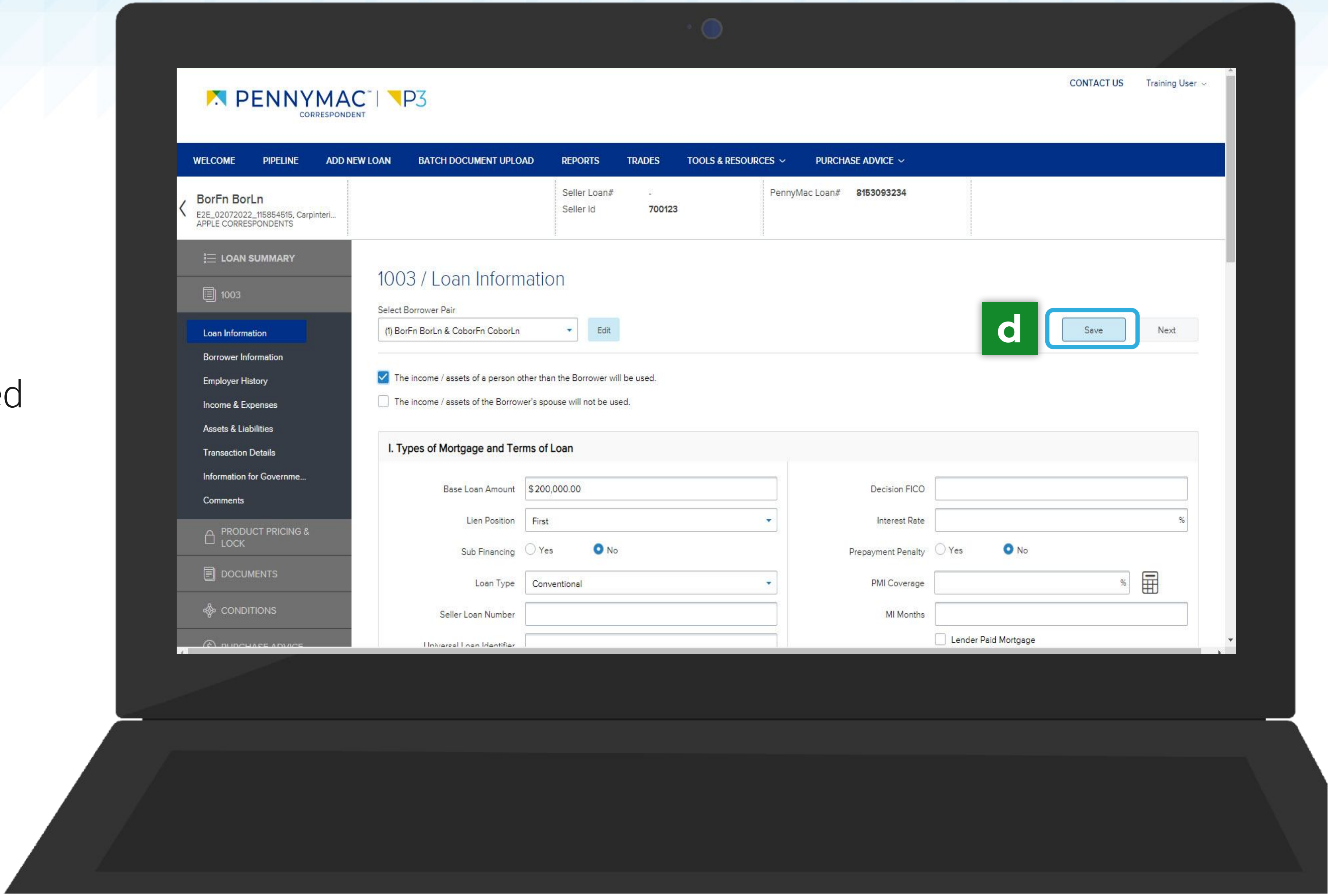
b Click the **Click to Browse** button to upload a Fannie Mae 3.2 (FNM) file from the computer or drag it to the **Drop Here to Upload** section.

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

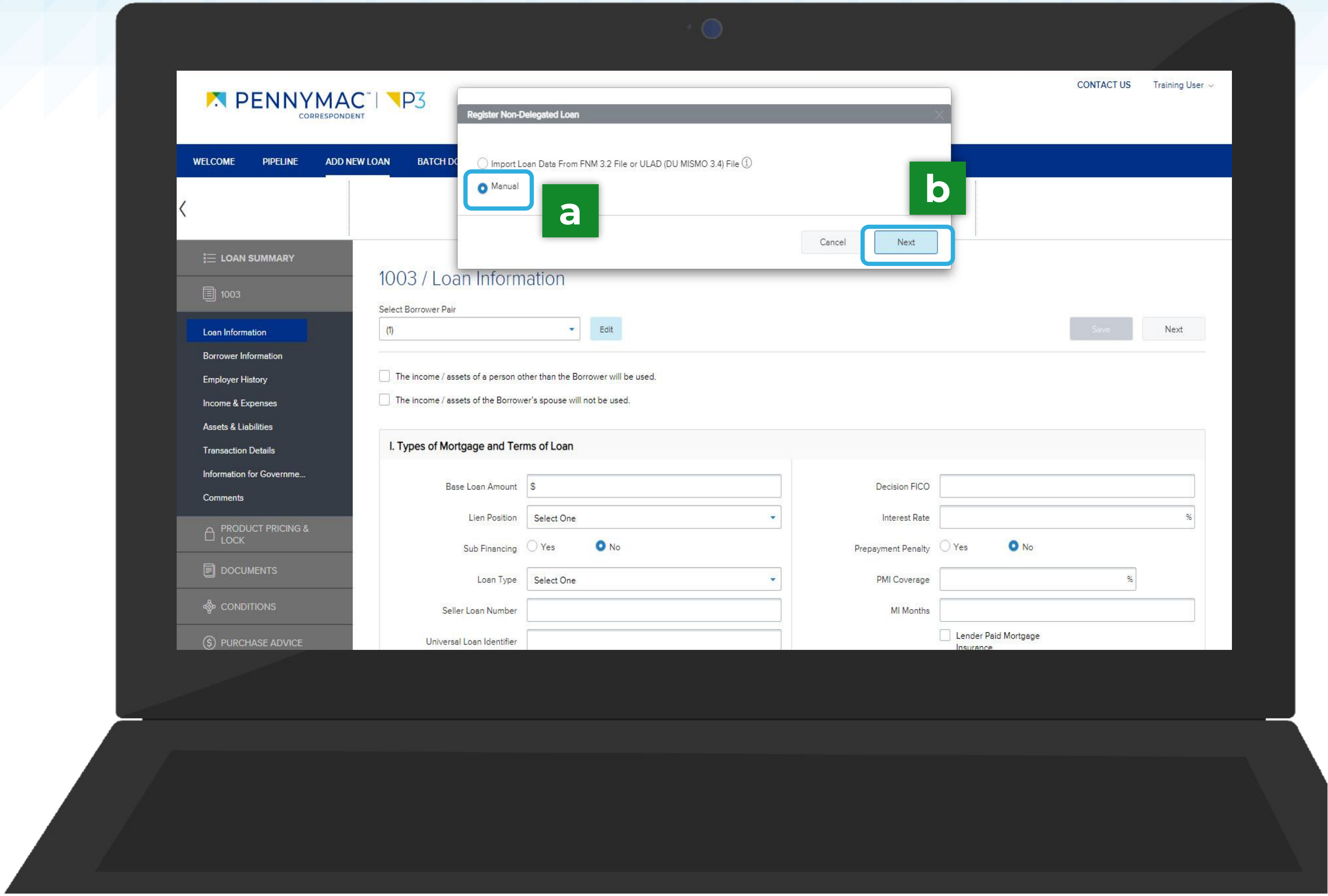
d After reviewing the information, click the **Save** button.

Registering a Non-Delegated Loan

Option 2

a Click the **Manual** option.

b Click the **Next** button to continue.

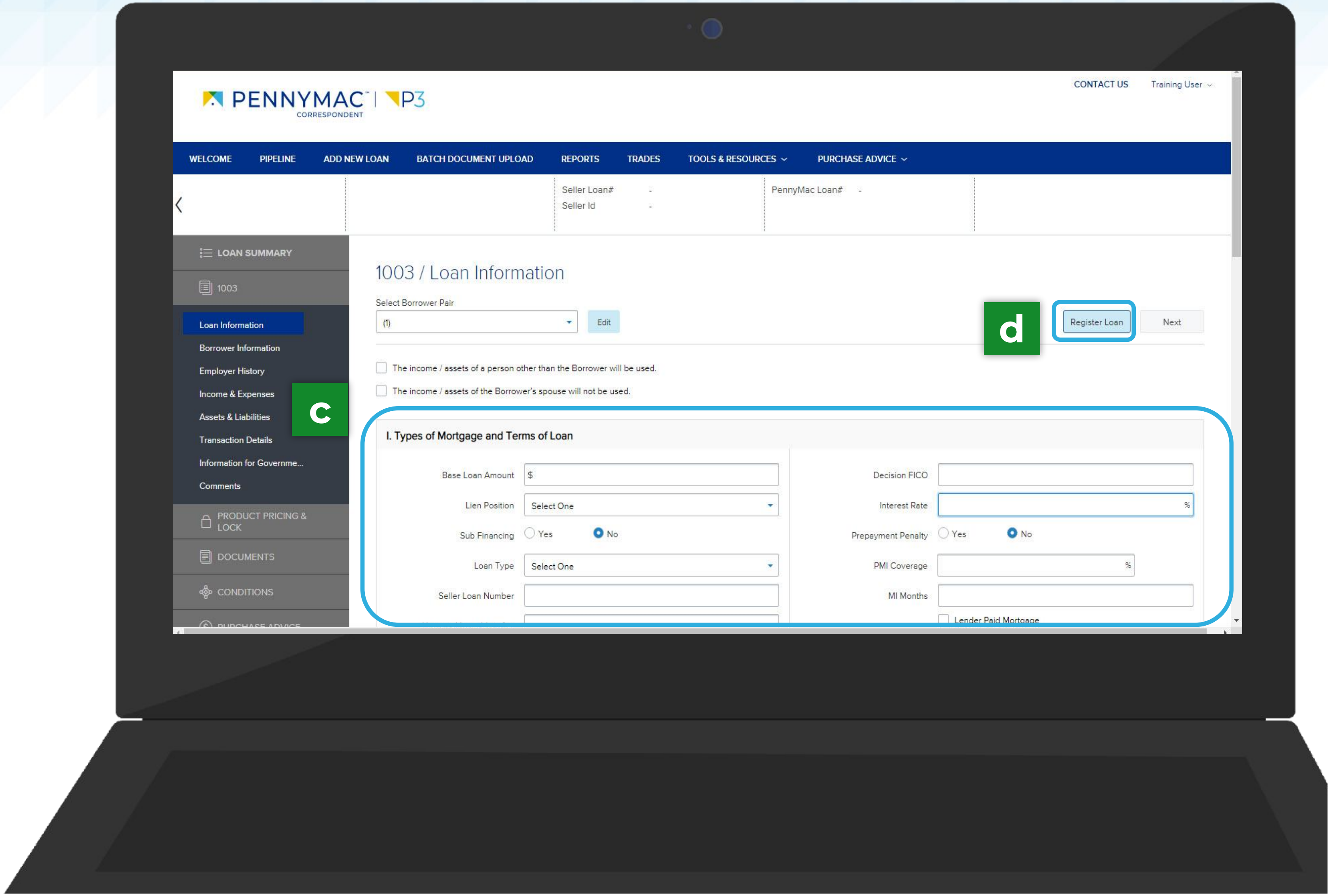


Registering a Non-Delegated Loan

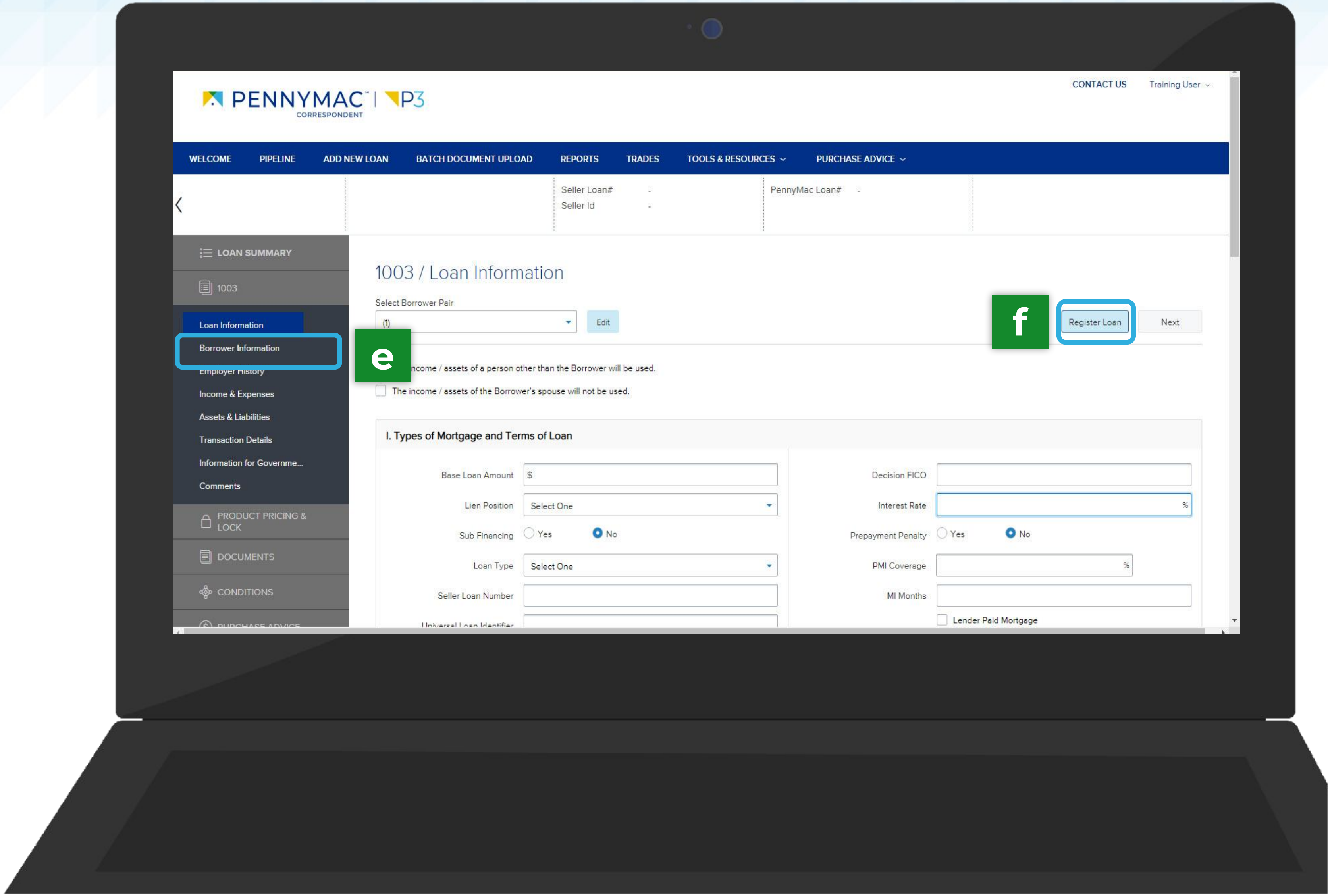
Option 2

c Complete all the loan information manually.

d After completing the information, click the **Register Loan** button.



Registering a Non-Delegated Loan



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!

PENNYMAC℠
CORRESPONDENT