

Client Readiness Training

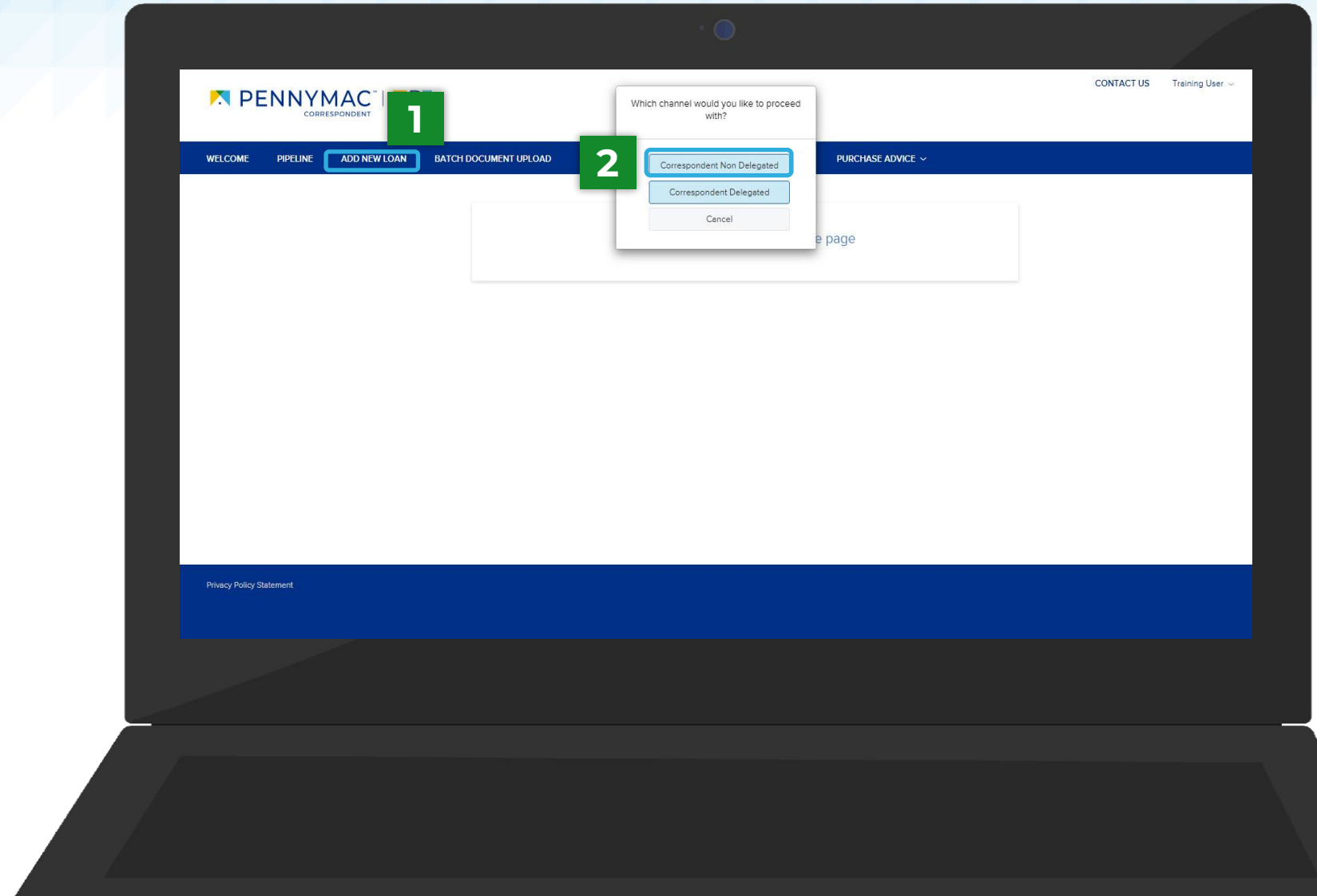
Non Delegated Loan Processing

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.
- i** 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

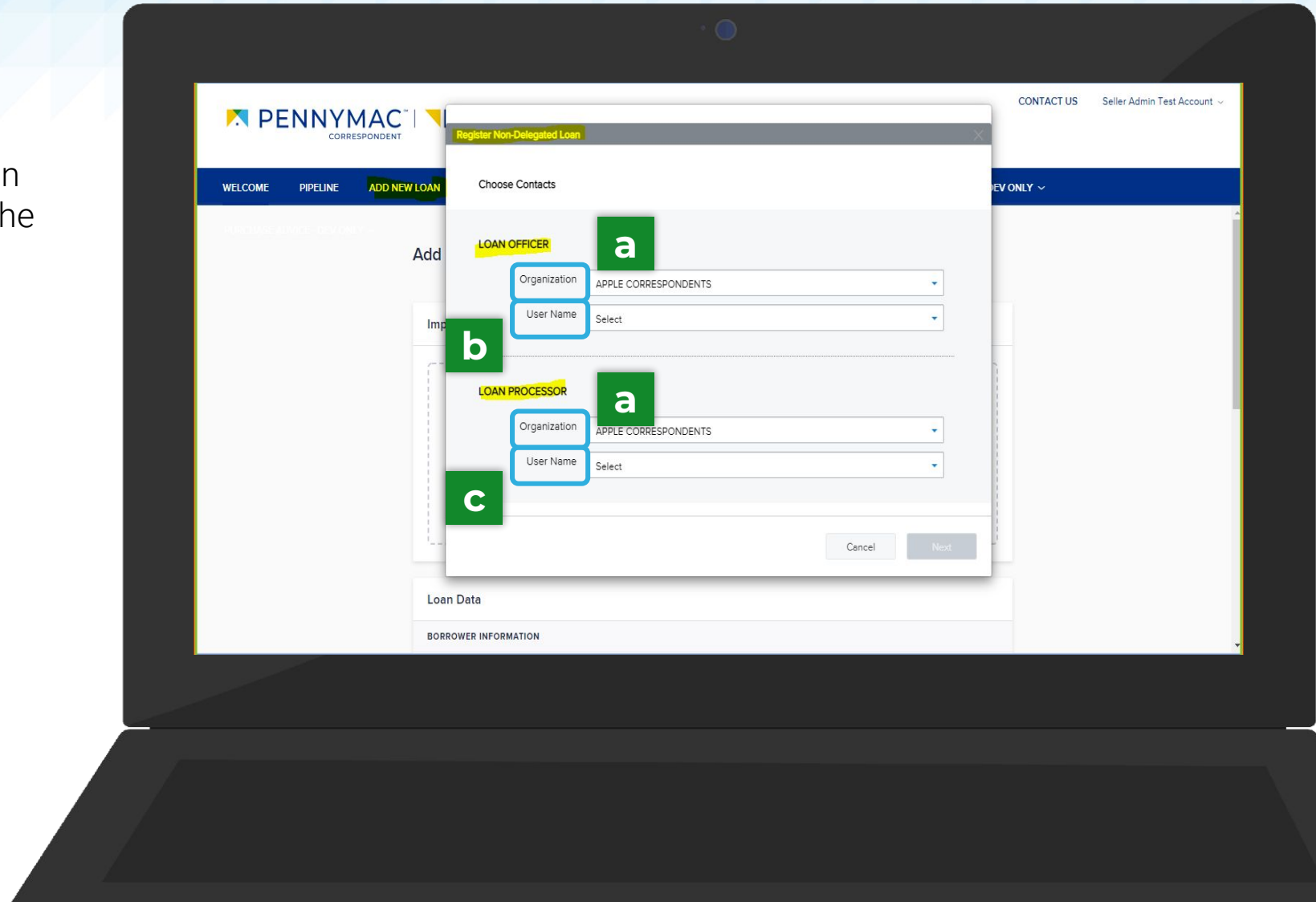
3 Once in the Register Non-Delegated Loan screen, you will see a pop-up to assign the loan to a LO / LP

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.

i The drop down list will only display your active users in P3. Both LO and LP must be selected to enable the Next button.

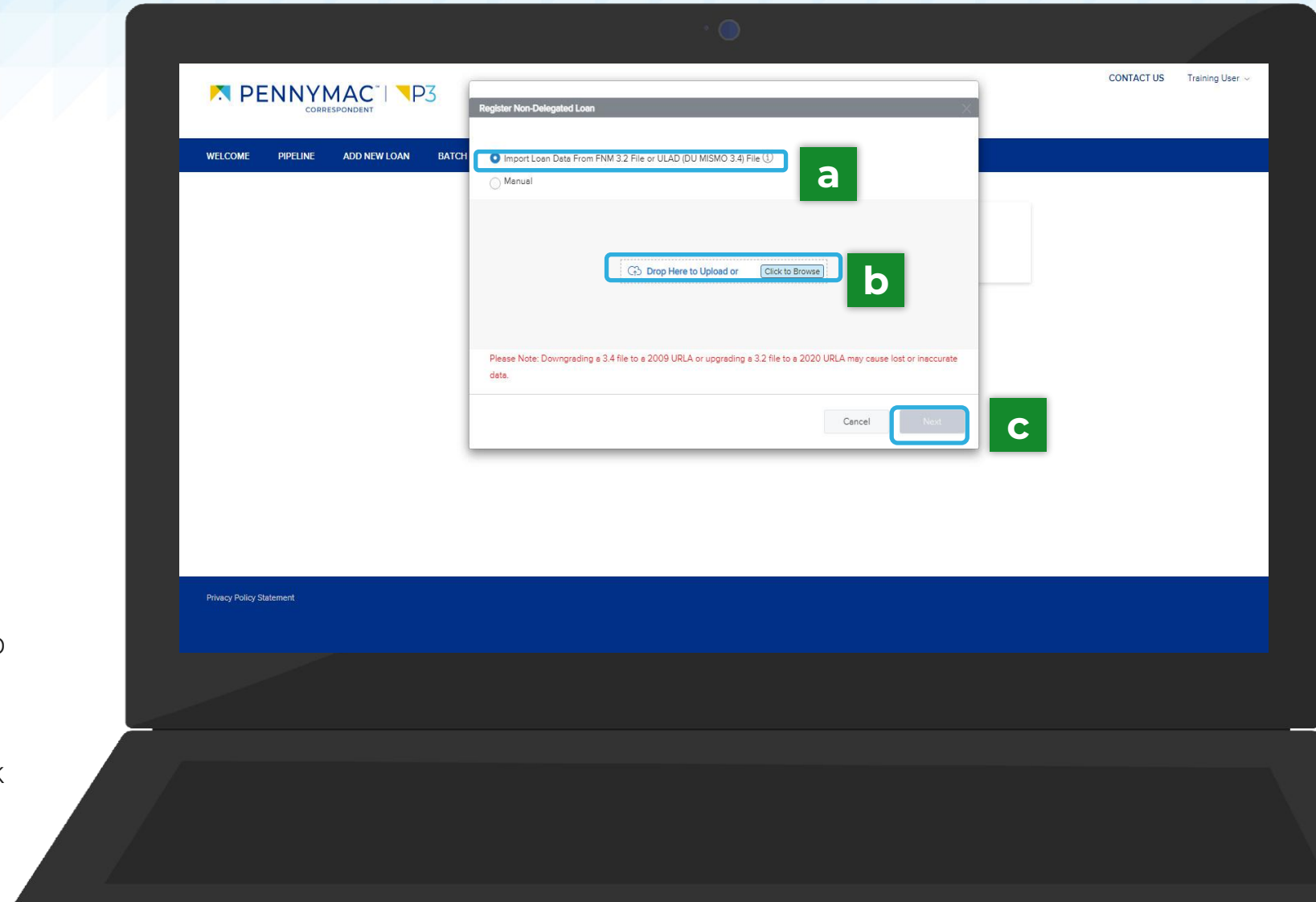


Registering a Non-Delegated Loan

- 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.



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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



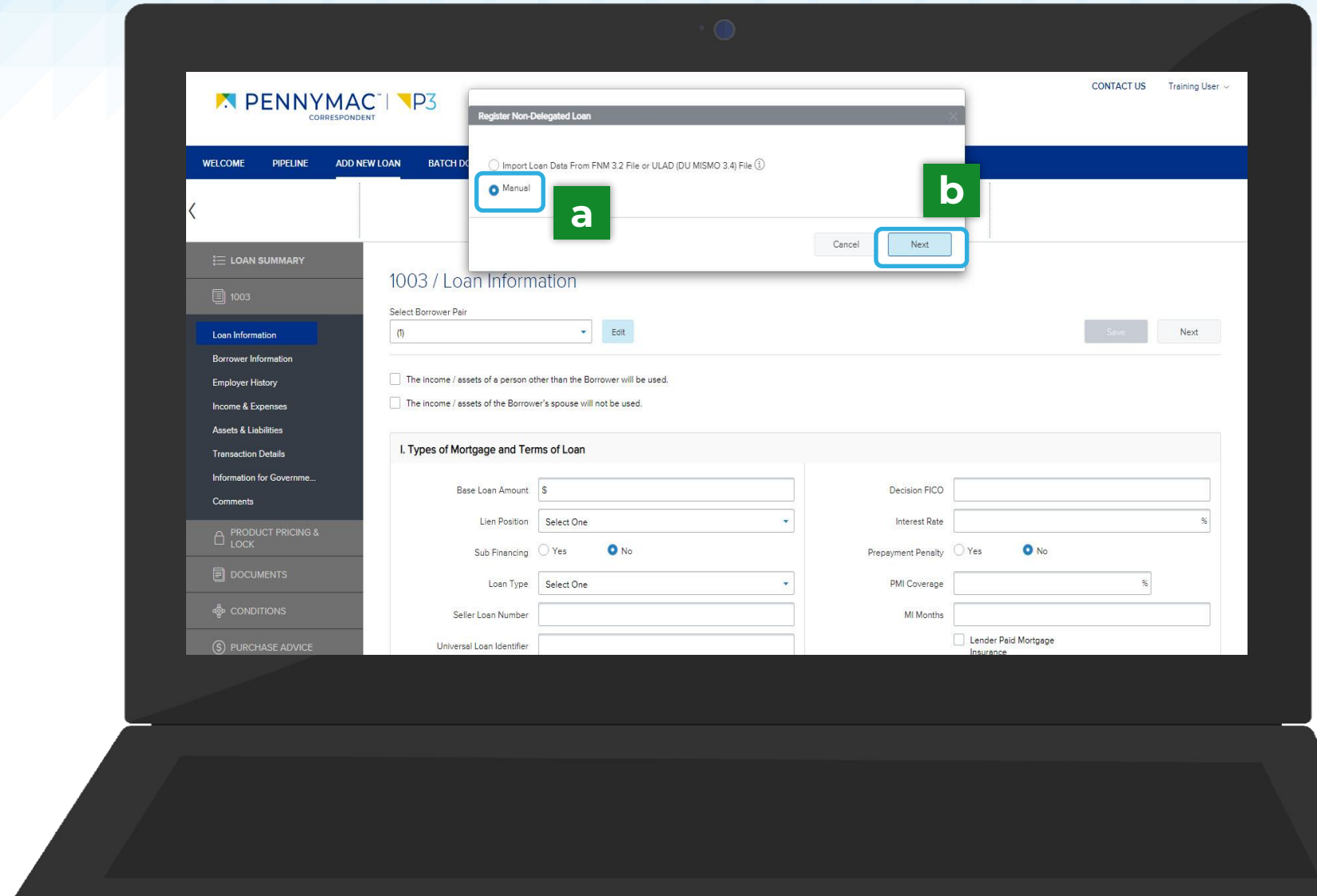
After reviewing the information, click the **Save** button.

The screenshot displays the PENNYMAC CORRESPONDENT P3 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 is titled '1003 / Loan Information' and features a 'Select Borrower Pair' dropdown menu with a 'Save' button highlighted in blue. Below this, there are two checkboxes: 'The income / assets of a person other than the Borrower will be used.' (checked) and 'The income / assets of the Borrower's spouse will not be used.' (unchecked). The 'I. Types of Mortgage and Terms of Loan' section contains several input fields: Base Loan Amount (\$200,000.00), Lien Position (First), Sub Financing (No), Loan Type (Conventional), Seller Loan Number, Decision FICO, Interest Rate, Prepayment Penalty (No), PMI Coverage, MI Months, and a checkbox for Lender Paid Mortgage. A green square icon with a white letter 'd' is overlaid on 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.

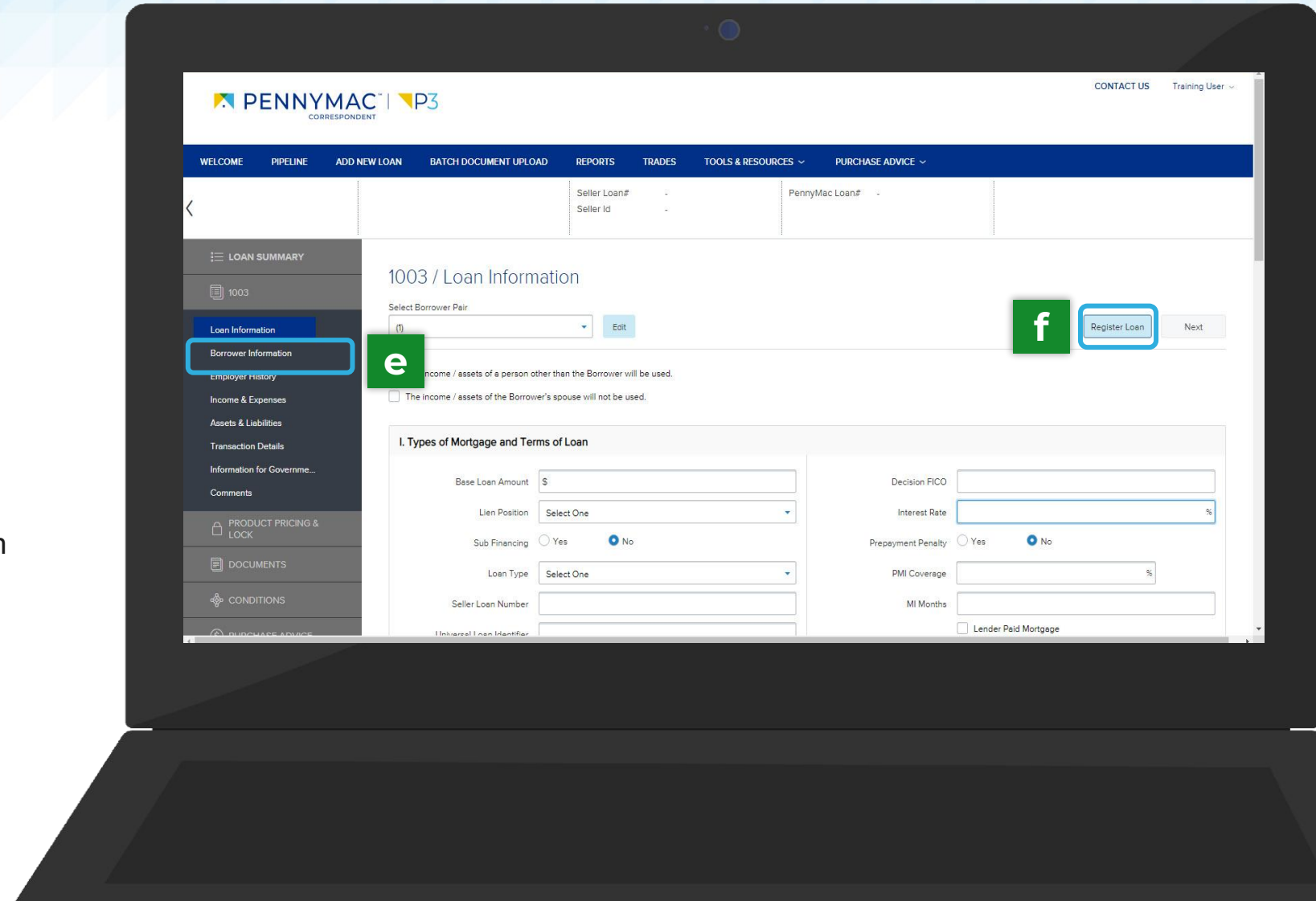
The screenshot displays the PENNYMAC CORRESPONDENT P3 web application interface. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE ADVICE'. The main content area is titled '1003 / Loan Information' and features a sidebar with navigation options like 'LOAN SUMMARY', 'Borrower Information', and 'PRODUCT PRICING & LOCK'. The form includes fields for 'Seller Loan#', 'Seller Id', and 'PennyMac Loan#'. A 'Select Borrower Pair' dropdown is set to '(f)'. Below this, there are checkboxes for income/asset usage. The 'I. Types of Mortgage and Terms of Loan' section is highlighted with a blue box and contains fields for 'Base Loan Amount', 'Lien Position', 'Sub Financing', 'Loan Type', 'Seller Loan Number', 'Decision FICO', 'Interest Rate', 'Prepayment Penalty', 'PMI Coverage', and 'MI Months'. A 'Register Loan' button is highlighted with a blue box and a green 'd' icon, and a green 'c' icon is placed over the 'Income & Expenses' sidebar item.

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!**

