


Client Readiness Training

Delegated Document Submission & Reporting

Submit Condition Documentation

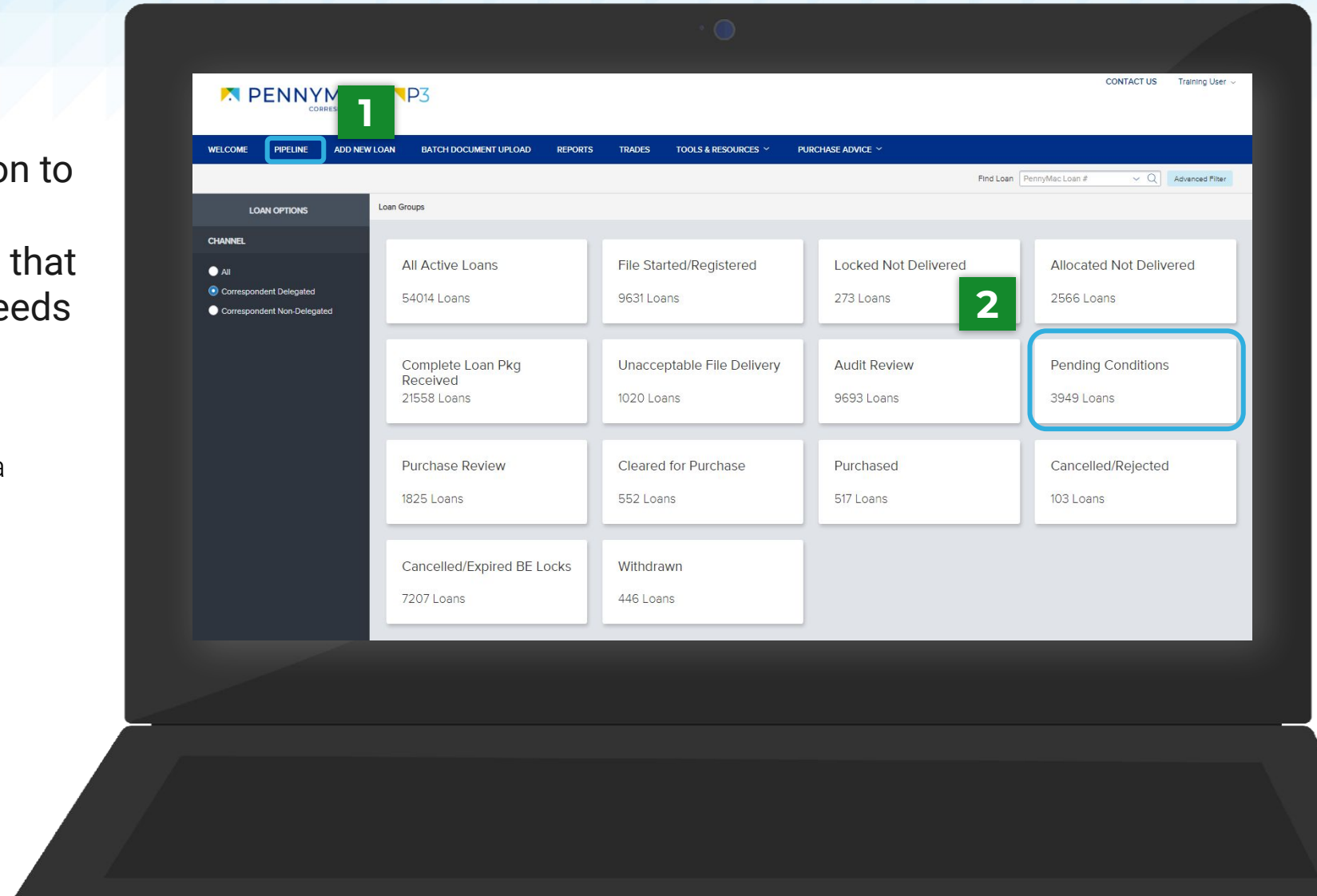
Submit Condition Documentation

To submit condition documentation to a loan, the loan has to have open “Pending Conditions”. This means that the loan has been reviewed and needs additional loan documentation.

 Uploading condition documents to a loan will only be enabled if the loan has outstanding conditions.

1 Go to the *Pipeline* tab.

2 Click the Pending Conditions tile.



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3 Select the loan from the list.

The screenshot displays the Pennymac Correspondent P3 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 shows a table of loans with columns: PennyMac Loan #, Seller Loan #, Borrower Last Name, Property State, Current Status, Loan Type, Loan Amount, Note Rate, Loan Program, and Comments. The table is filtered by 'Pending Conditions'. A blue box highlights the row for loan 8150091006. A green box with the number 3 is overlaid on the left sidebar, which contains 'LOAN OPTIONS' and 'CHANNEL' filters.

| PennyMac Loan # | Seller Loan # | Borrower Last Name | Property State | Current Status | Loan Type | Loan Amount | Note Rate | Loan Program | Comments |
|-----------------|---------------|---------------------|----------------|----------------|--------------|-------------|-----------|------------------|------------|
| 8152405208 | | | MN | In Review | Conventional | 300,000.00 | 4.750 | Conf 21-30 Fixed | 09/11/2018 |
| 8153097683 | | | CA | In Review | Conventional | 8,900.00 | 2.625 | Conf 21-30 Fixed | 02/11/2018 |
| 8152955446 | | 214 CP8 don't touch | TX | In Review | VA | 300,000.00 | 4.750 | Conf 21-30 Fixed | 01/11/2018 |
| 8150091006 | 8340563532 | AutoLName125 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 07/11/2018 |
| 8150046366 | 8386655864 | AutoLName145 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 07/11/2018 |
| 8150605768 | 8675623435 | AutoLName176 | CA | In Review | VA | 499,500.00 | 3.875 | VA 18-30 Fixed | 09/11/2018 |
| 8150045677 | 5327737209 | AutoLName215 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 07/11/2018 |
| 8150048195 | 6041177201 | AutoLName235 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 07/11/2018 |
| 8150037477 | 9145923762 | AutoLName235 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 07/11/2018 |
| 8150692863 | 1315191832 | AutoLName340 | CA | In Review | Conventional | 499,500.00 | 3.875 | Conf 21-30 Fixed | 09/11/2018 |

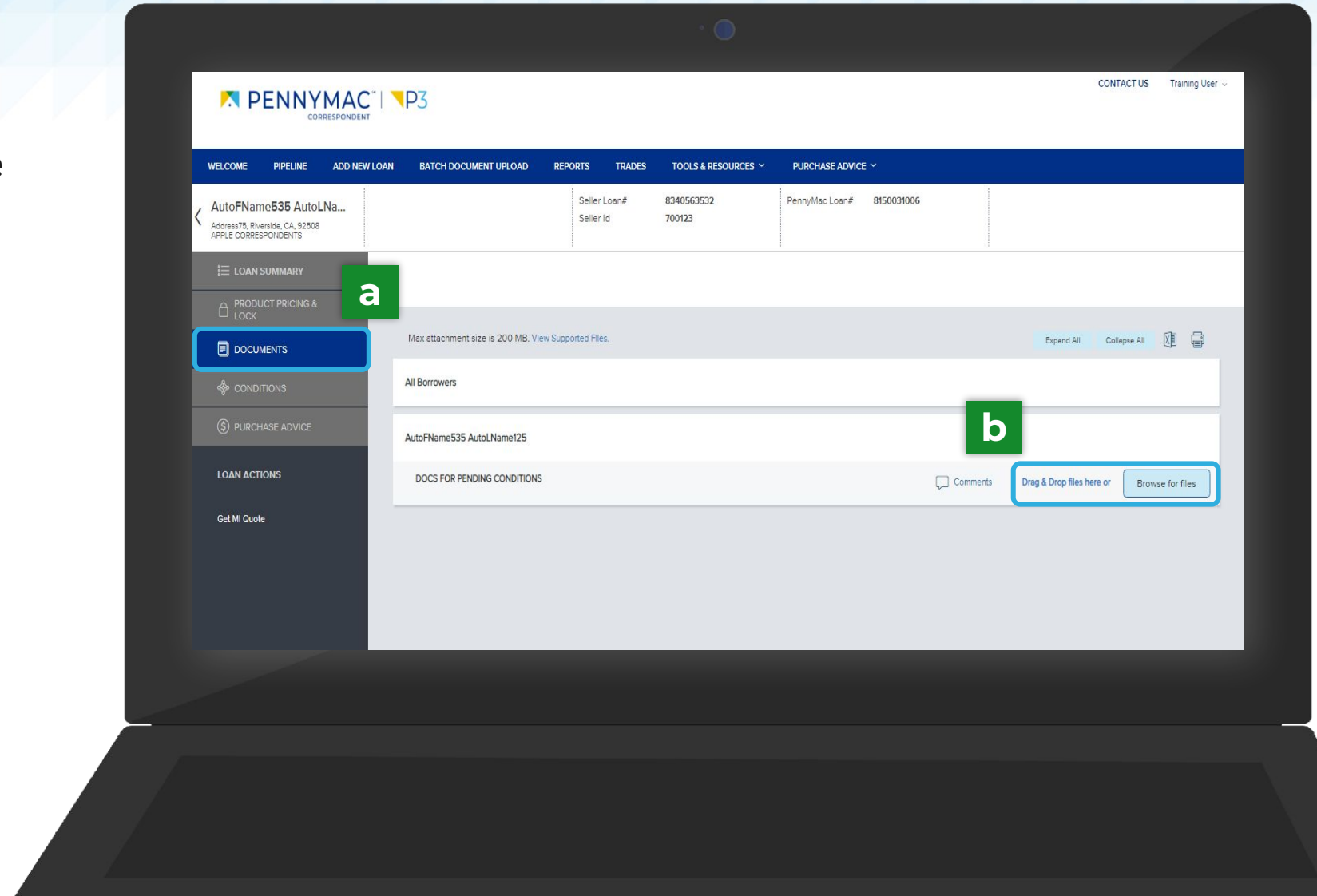
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There are two options to complete pending conditions:

Option 1:

- a** Click on the *Documents* section.
- b** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.

i The file will appear with a green check when uploading is complete. Conditions do not require a *Submit* button to be clicked and one will not be displayed.



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Option 2:

- a** Click on the *Conditions* section.
- b** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.
- c** Click the *Browse for files* button in the *Docs for Pending Conditions* folder and select a file.

i Condition status will also show on this screen. Statuses include *Open*, *Received*, & *Satisfied*.

The screenshot displays the PENNYMAC CORRESPONDENT P3 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 shows a loan summary for 'AutoFName535 AutoLNa...' with details like 'Address: 75, Riverside, CA, 92508' and 'APPLE CORRESPONDENTS'. The 'CONDITIONS' section is active, showing a table with one condition: 'Original note required.' with a status of 'Added' and a type of 'P'. A 'DOCS FOR PENDING CONDITIONS' button is highlighted below the table.

**THANK
YOU!**

