

Submit Post Purchase Conditions Documents

JOB AID

This Job Aid walks you through how to submit documents for Post Purchase Conditions in Pennymac's Portal, for Purchased loans.

A To submit condition documentation to a loan that has been purchased:

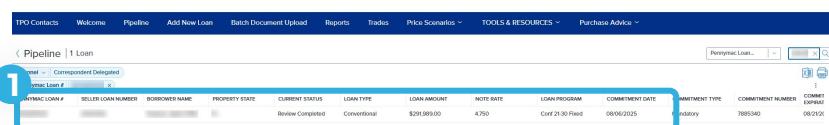
1. Go to the *Pipeline* tab.
2. Input the loan number into the search field.

You can choose to search by Pennymac Loan #, Borrower Name or Seller Loan #, using the drop down option next to the Search Field.



B Once you search for the loan:

1. Select the loan to review the condition.



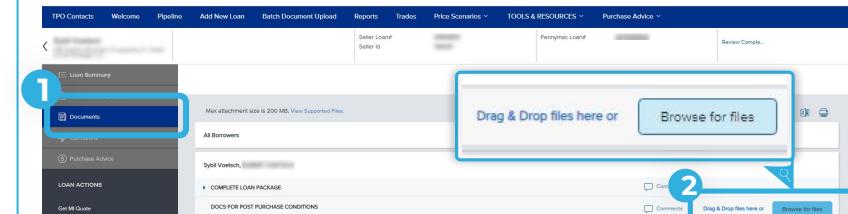
C In the loan page:

1. Click on the Documents section.
2. Click the Browse for files button of the Docs for Post Purchase Conditions line and select a file. The Drag & Drop option is also available for documents upload.

The file appears with a green check when the uploading is completed.

ATTENTION!

Do not upload documents to any of the other folders present. Documents uploaded will not be tasked for review if they are not uploaded to the Docs for Post Purchase Conditions folder.



Let's review another way to submit Post Purchase Conditions documentation!

A Once in the loan page:

1. Click the Conditions section.
2. Click the arrow button of the condition to expand its information.
3. Click the Docs for Post Purchase Conditions button to add documents.

Once the documents have been uploaded the submission is completed! You do not need to click the Submit button.

The screenshot shows the 'Conditions' section of a loan application. A callout with three numbered circles highlights the process: 1. The 'Conditions' section in the sidebar. 2. The expand arrow on a specific condition. 3. The 'Docs for Post Purchase Conditions' button, which is highlighted with a blue box and a callout. The main content area shows a condition titled 'Get MI Quote' with a description: 'Per Family: B3-4.3-04 No Gift Funds Transfer Verification: Verification of transfer and deposit of gift funds in the amount of \$200,000'. Below this is a table of linked document folders and a 'Browse LOCAL DRIVE' button.

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