



PennyMac
Correspondent

PennyMac

CLIENT READINESS TRAINING

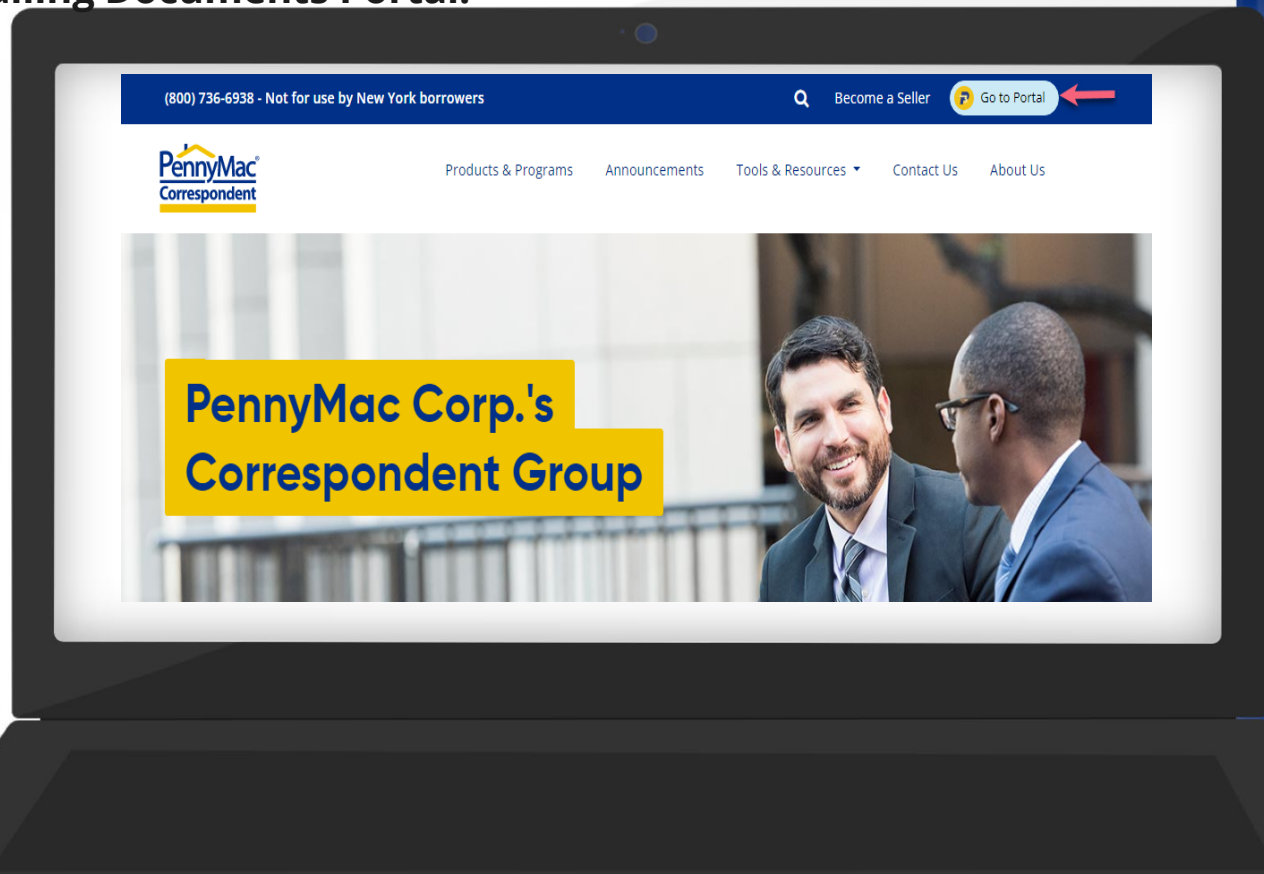
Trailing Documents Portal

Trailing Documents Portal

Follow the steps to access the Trailing Documents Portal:

 PennyMac Correspondent Portal
<https://www.gopennymac.com>

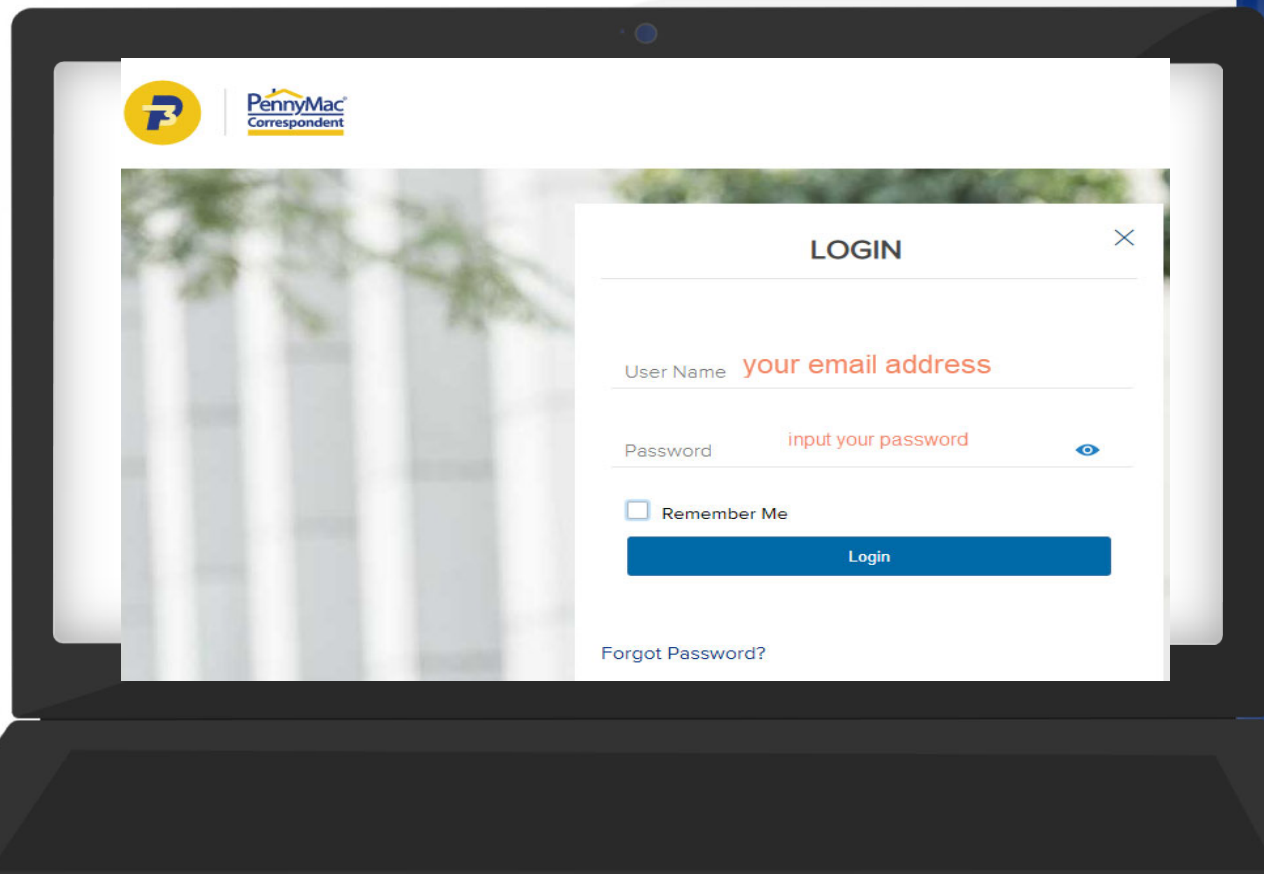
 click on **Go to Portal**



Trailing Documents Portal

 Enter your **email address** and **password**.

 Click **LOGIN** Button



Trailing Documents Portal



PennyMac utilizes 2 Factor authentication.

When entering The Portal for the first time, an authentication code will be sent by email. That **code** must be entered to access this section.



Enter the code in the designated box and click **SUBMIT**

- Verification _____

Please enter your verification code that was sent to your email account s

Enter code

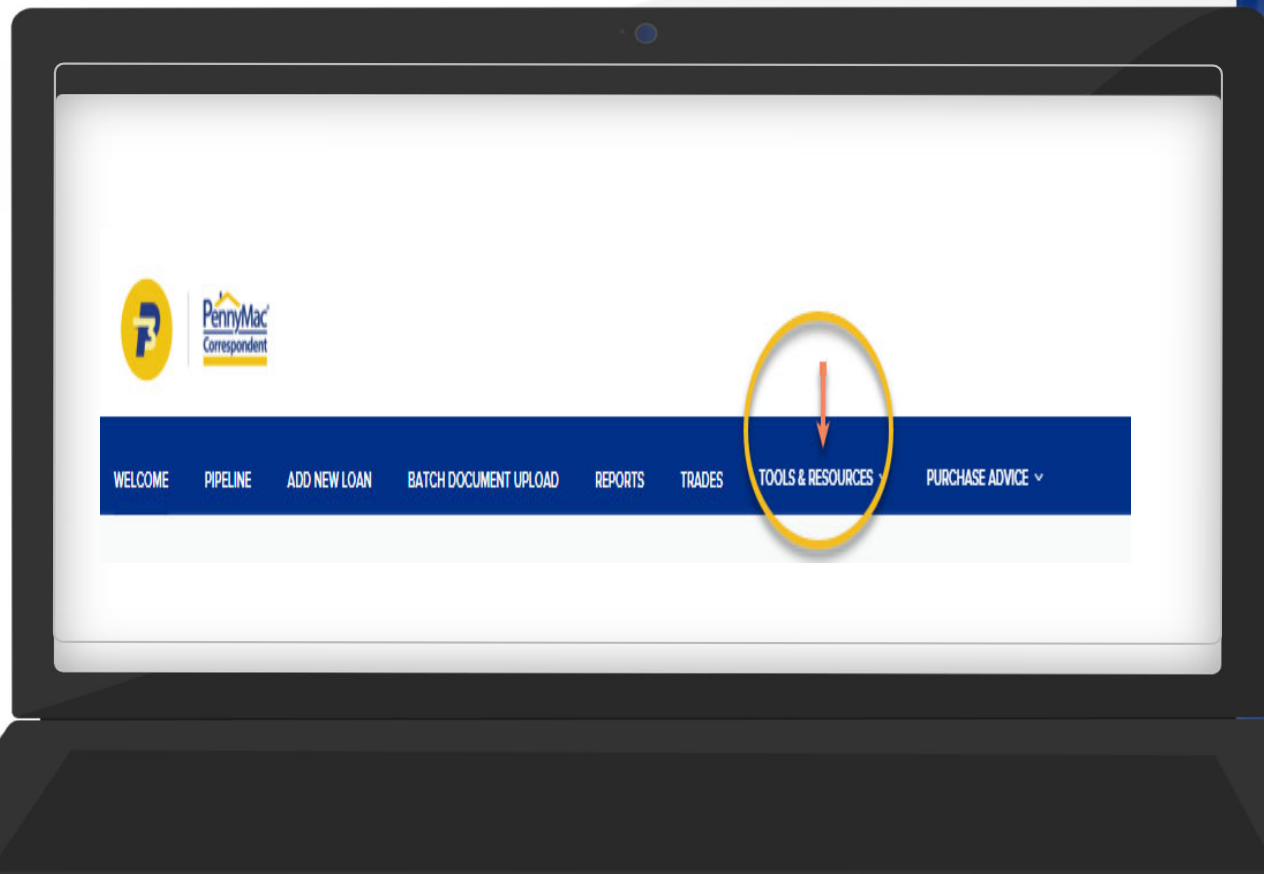
Trailing Documents Portal



On the home page, go to
TOOLS & RESOURCES



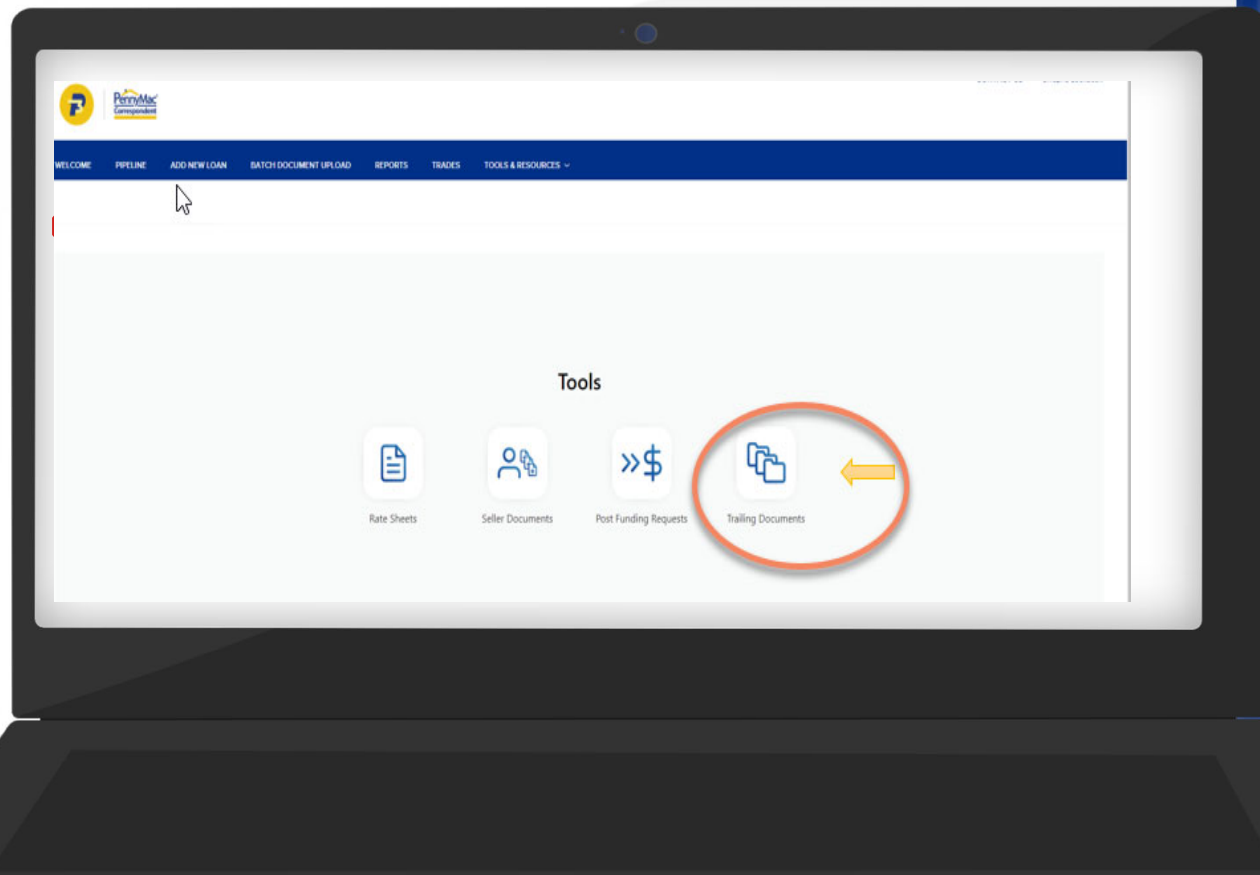
Choose **TOOLS** from the drop
down list



Trailing Documents Portal



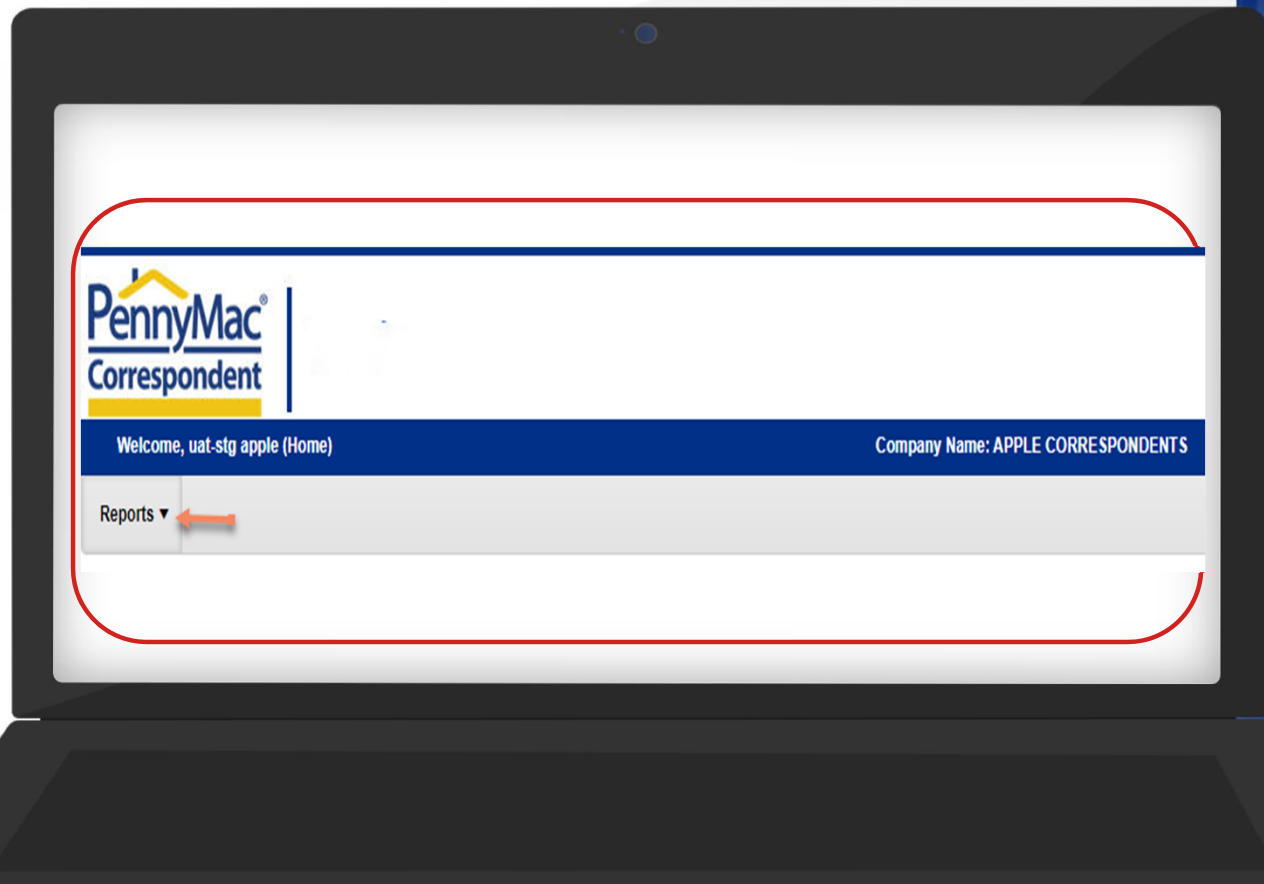
Click the **TRAILING DOCUMENTS** icon



Trailing Documents Portal

Click **Reports**

Choose **TD REPORTS**
from the drop down list



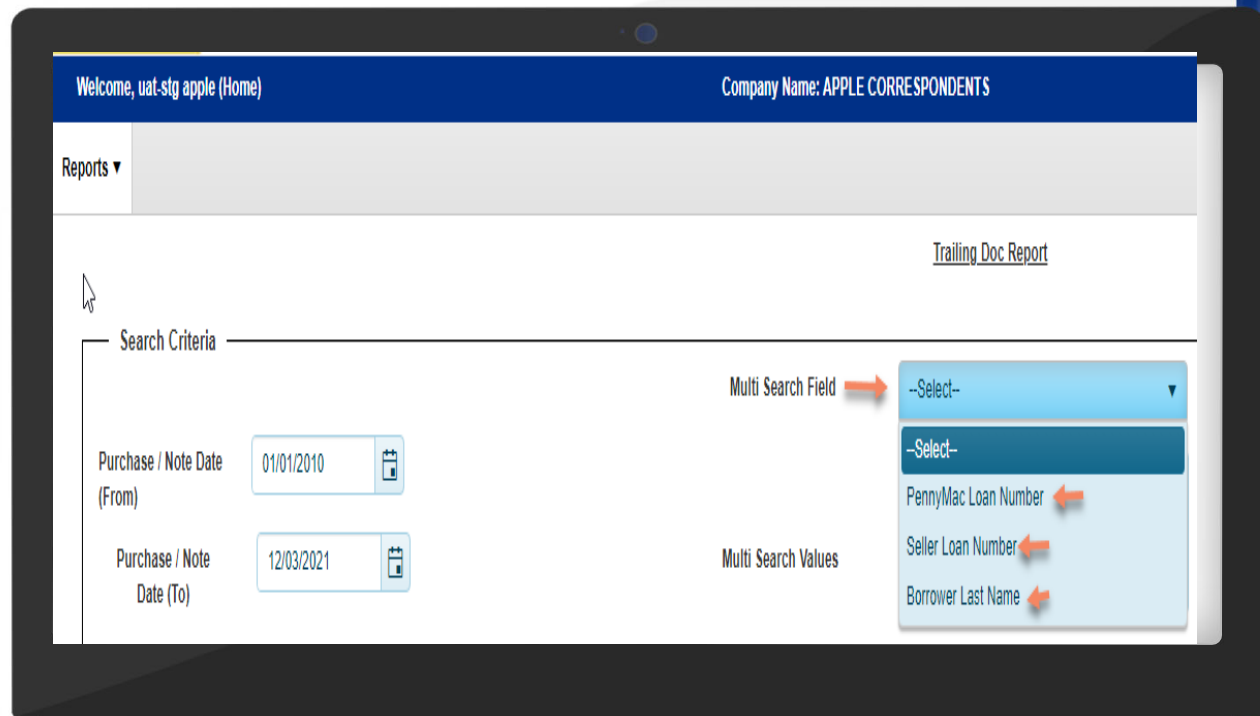
Step by Step guide: Electronic delivery of Trailing Documents

Trailing Documents Portal

Single document upload for one or multiple loans

In the Multi Search Field choose one criteria from the drop down list:

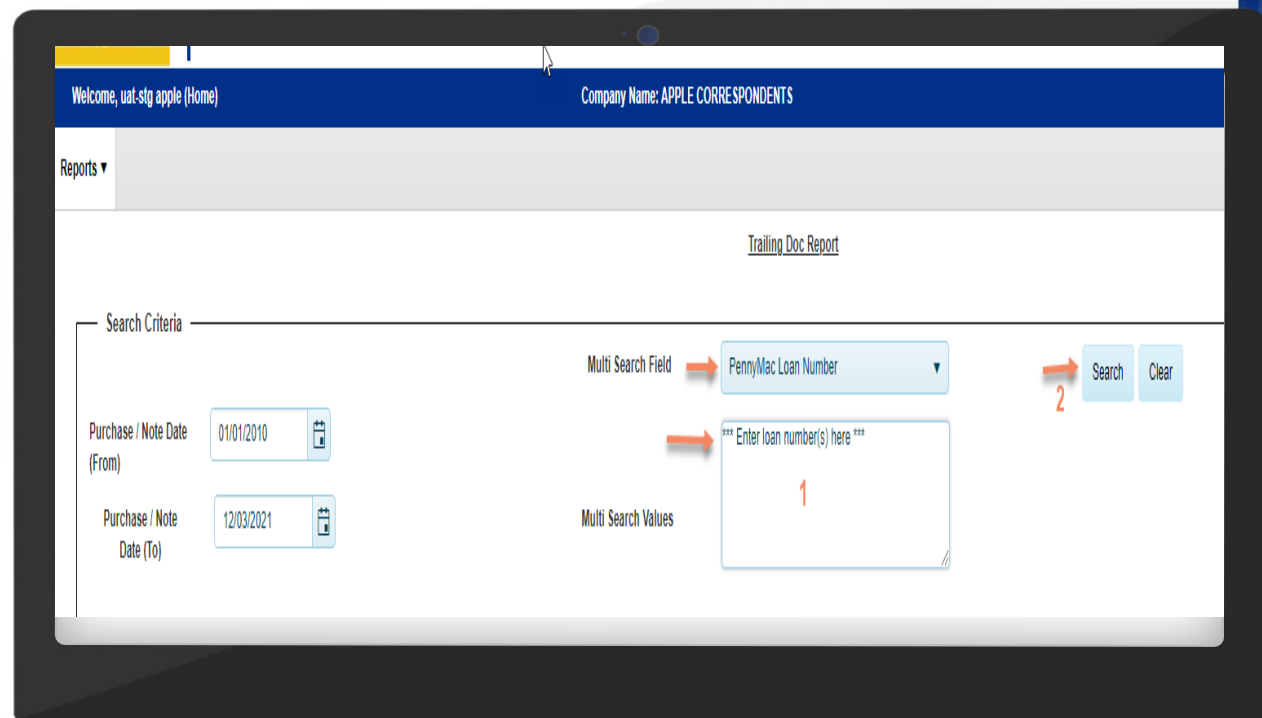
- PennyMac loan number
- Seller loan number
- Borrower last name



Trailing Documents Portal

Enter information (based on the criteria chosen) in the **Multi Search Values** box. Use comma as the separator for multiple items.

Users will only see applications they their user personas.



Trailing Documents Portal

Click on the **box** next to the loan number

Click the **Upload Docs** button.

Welcome, uat-stg apple (Home) Company Name: APPLE CORRESPONDENTS

Reports ▾

Trailing Doc Report

Search Criteria

Purchase / Note Date (From) 01/01/2010

Purchase / Note Date (To) 12/03/2021

Multi Search Field PennyMac Loan Number

Multi Search Values 8151151356

Search Clear

Note: Subject to billing at 240 days.

	PennyMac Loan #	Seller Loan #	Days Outstanding	Borrower Name	Document Type	Upload Document	Product Type	Purchase/Note D...	Comment 1
<input checked="" type="checkbox"/>	8151151356	DI-CL01_v34	*360	BORROWER LAST NAME, BORROER FIRST NAME	Mortgage/Deed of Trust	Upload Docs	CONVENTIONAL	12/08/2020	
<input type="checkbox"/>	8151151356	DI-CL01_v34	*360	BORROWER LAST NAME, BORROER FIRST NAME	Final Title Policy	Upload Docs	CONVENTIONAL	12/08/2020	

Trailing Documents Portal

Click on **Upload Docs** Button (choose the document to upload)

- Once successfully attached, the pdf document will appear in the middle section

If the attached document is acceptable, click the **Submit** button.

Click the **Close** button to return to the home page.

Upload Documents

Document Type: Mortgage/Deed of Trust

Upload Doc(s) 1 Done

Upload Doc Id		
2106374698	01-21096579-04R_JS Sullivan DOT (1).pdf 2	Delete

* Once you click "Submit" button you can no longer delete documents

Submit 3 Close