PENNYMAC℠ | P3
CORRESPONDENT

Client Readiness Training

Non Delegated Document Submission & Reporting

CONFIDENTIAL & PROPRIETARY

Complete Loan Package

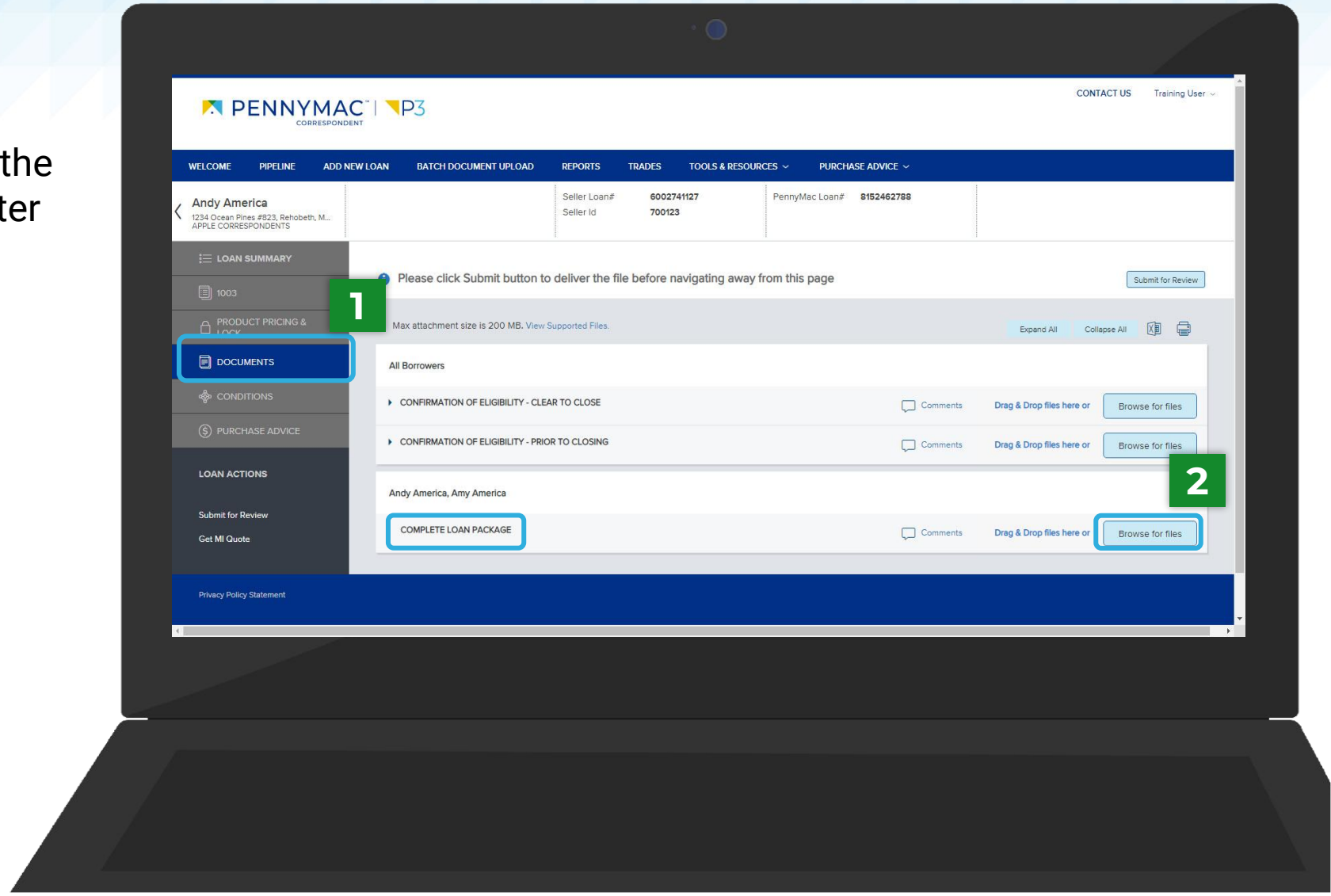
Complete Loan Package

Once the eligibility review is done, the loan package can be submitted after uploading documentation

1. Go to the **Documents** section of the loan.

2. Upload documents to the *Complete Loan Package* folder using the **Drag & Drop files** option or **Browse for files** for selecting files saved in the computer.

Zip files are not supported in P3.

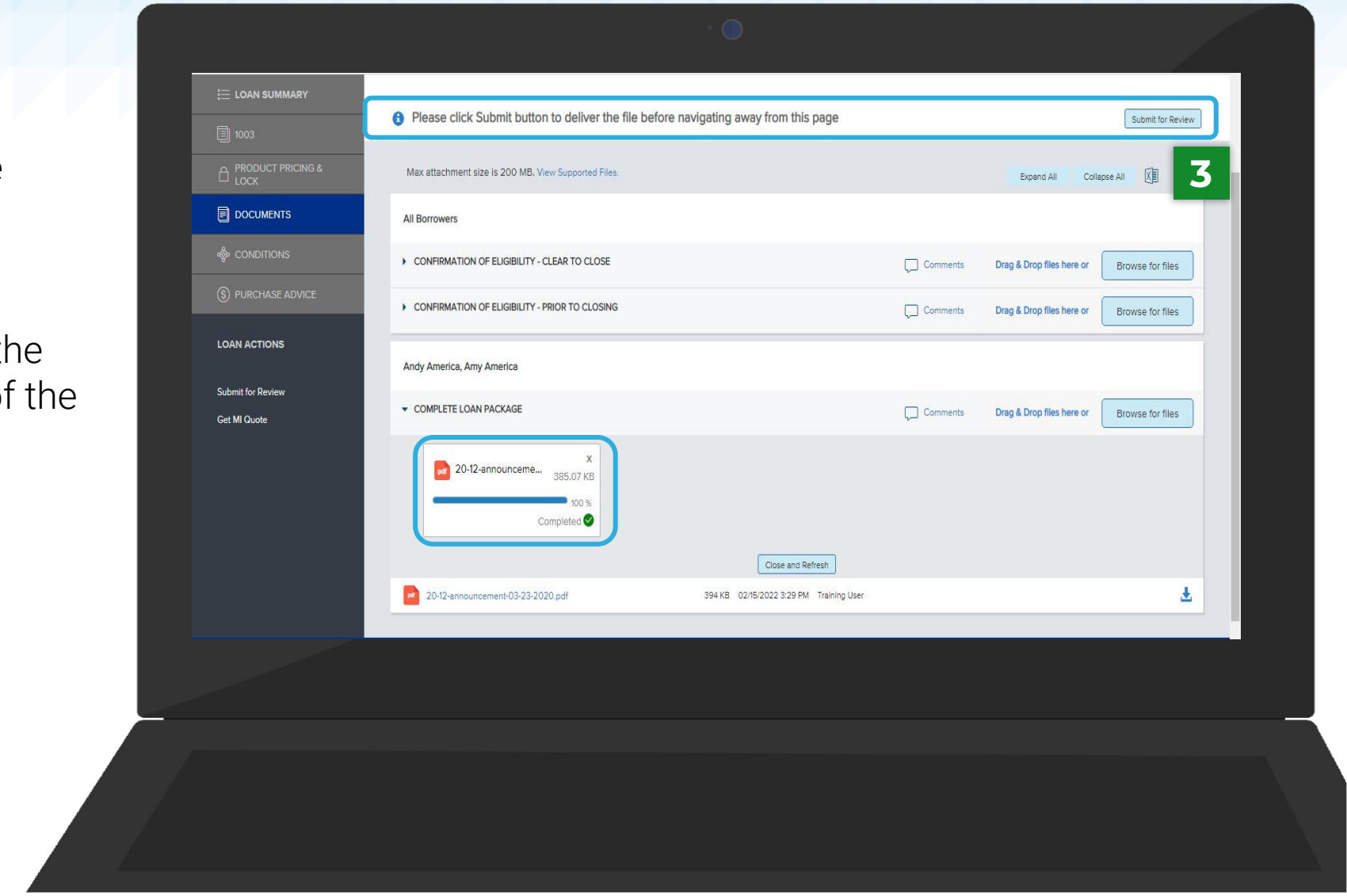


Complete Loan Package

Once the upload is completed, the uploaded document appears as **Completed** in the screen.

A message asking you to submit the file for review appears at the top of the screen.

3 Click the **Submit for Review** button.



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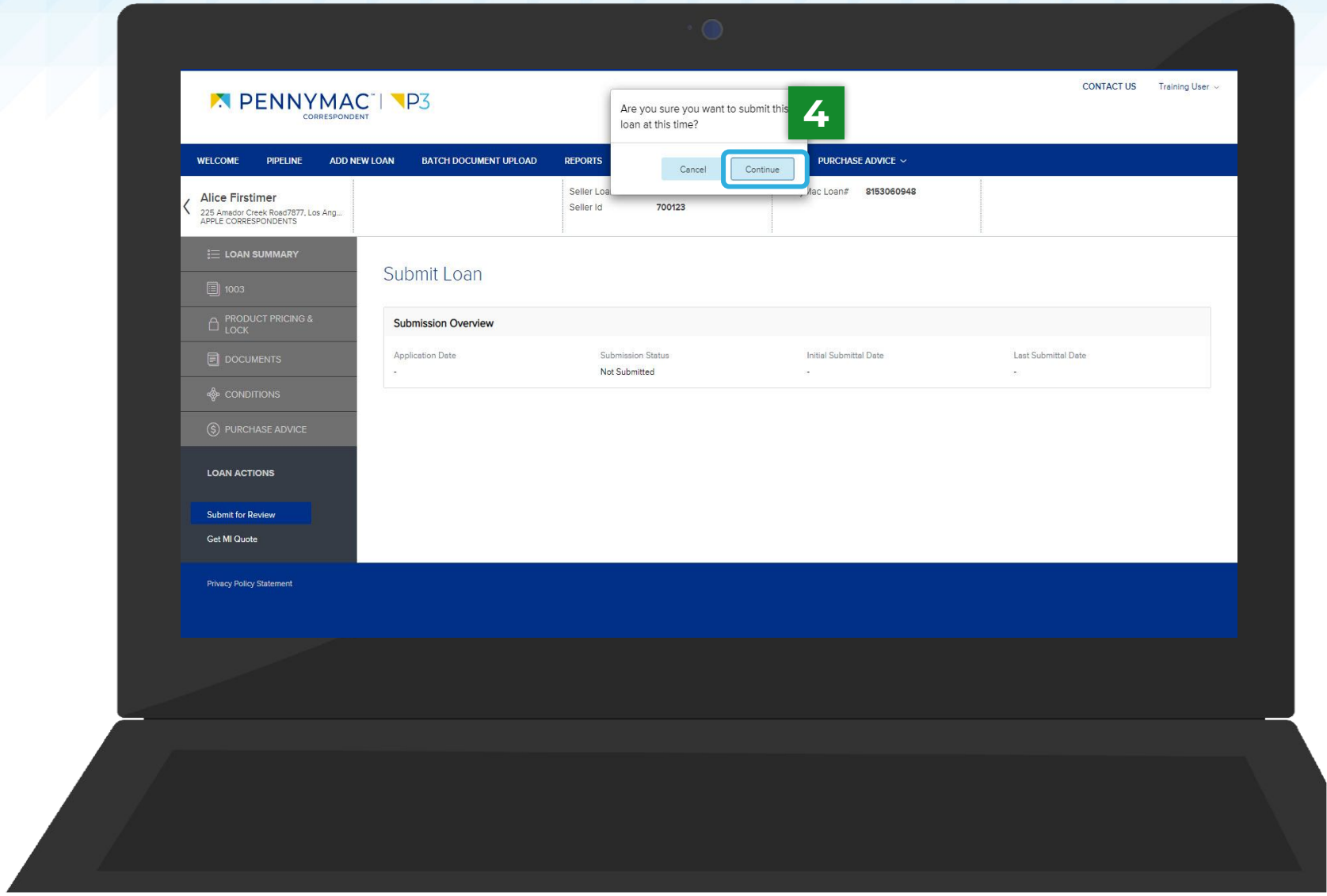
4 A submission confirmation window will pop up for the loan. Click **Continue** to confirm the loan submission.



After following these steps, the loan is in the queue for PennyMac to review and all the editing options will be disabled.

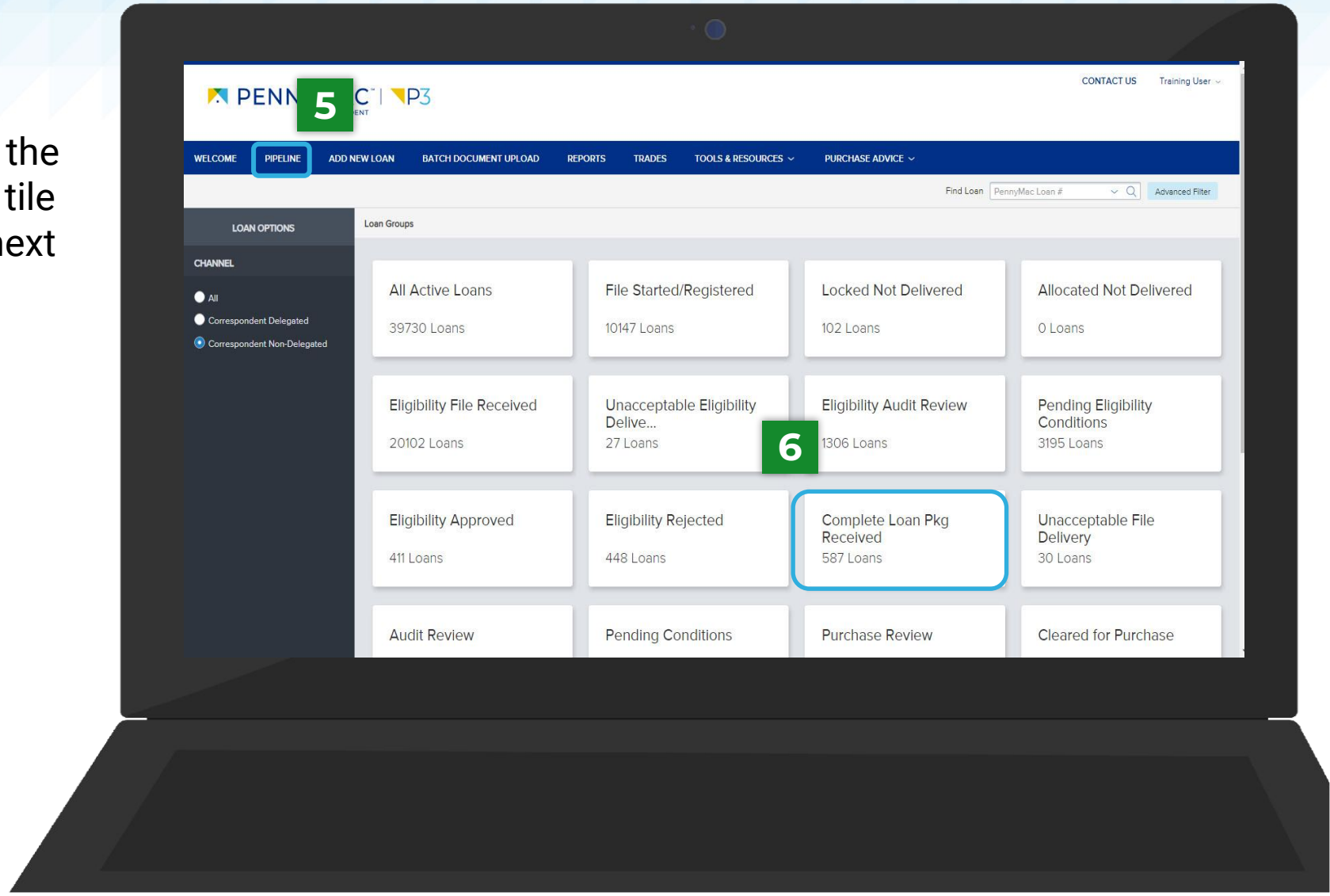
Complete Loan Package

The loan should now be located in the Complete Loan Package Received tile in the Pipeline screen. Follow the next steps to check this:

5 Go to the **Pipeline** tab.

6 Click the **Complete Loan Package Received** tile.

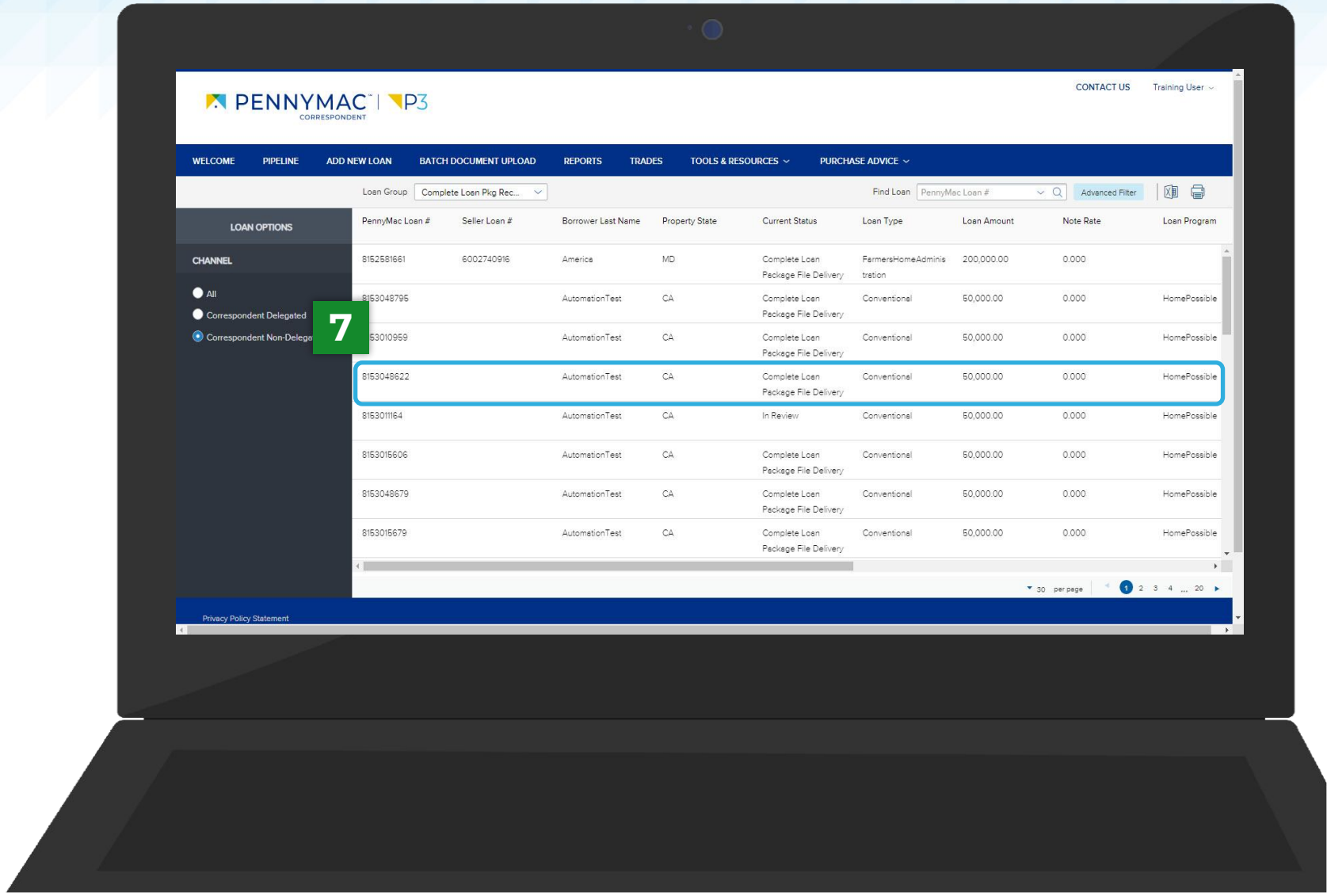
If the complete loan package is not submitted, it will stay in the **Lock Not Delivered** tile for Best Effort loans or the **Allocated Not Delivered** tile for Mandatory loans.



Complete Loan Package

7 Find the loan in the pipeline list.

The search bar in the top header can be used to search loans by their loan number.



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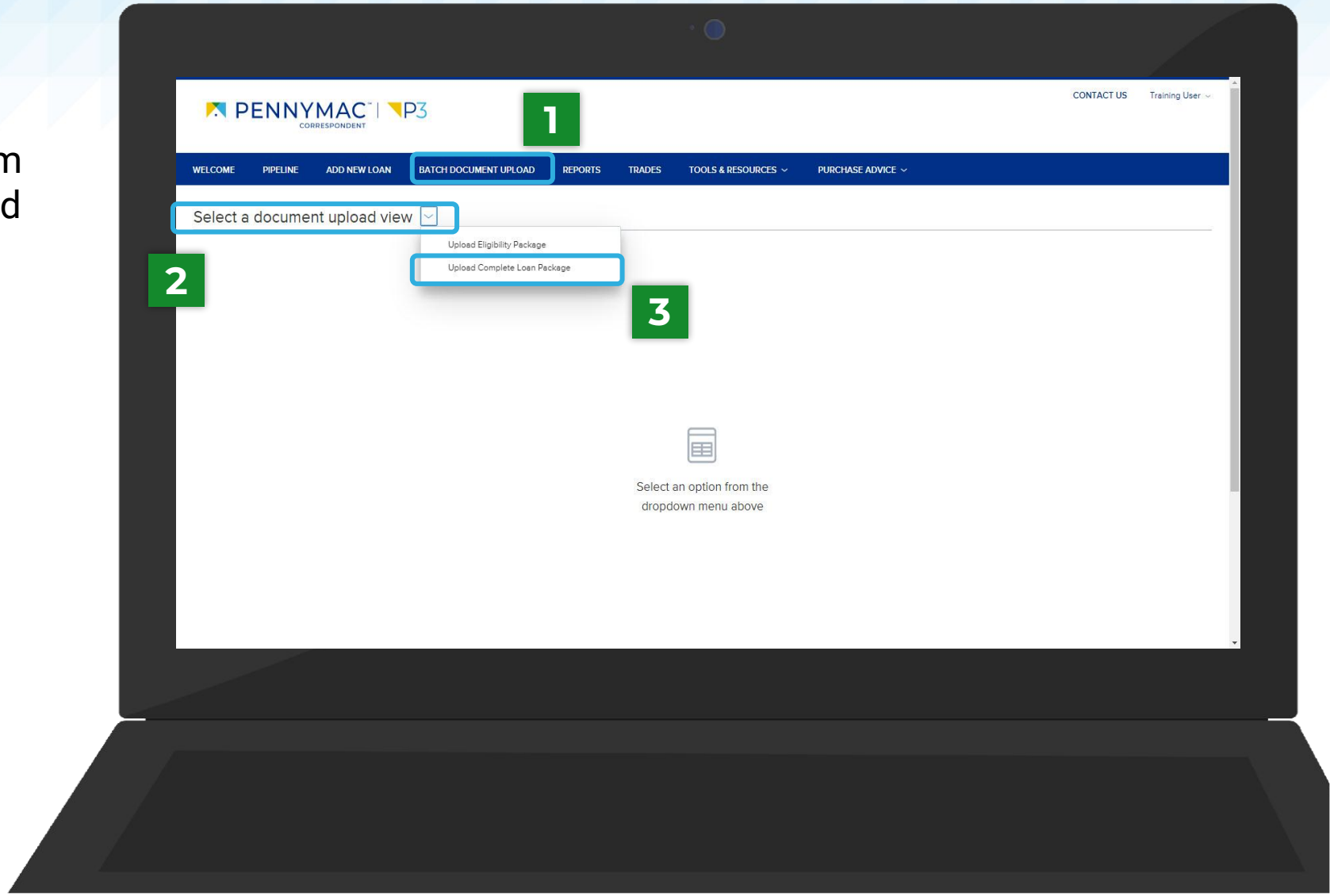
Let’s review another way to perform the Complete Loan Package upload process:

1. Go to the **Batch Document Upload** tab.
2. Click the **Select a document upload view** drop-down menu.
3. Select the **Upload Complete Loan Package** option.



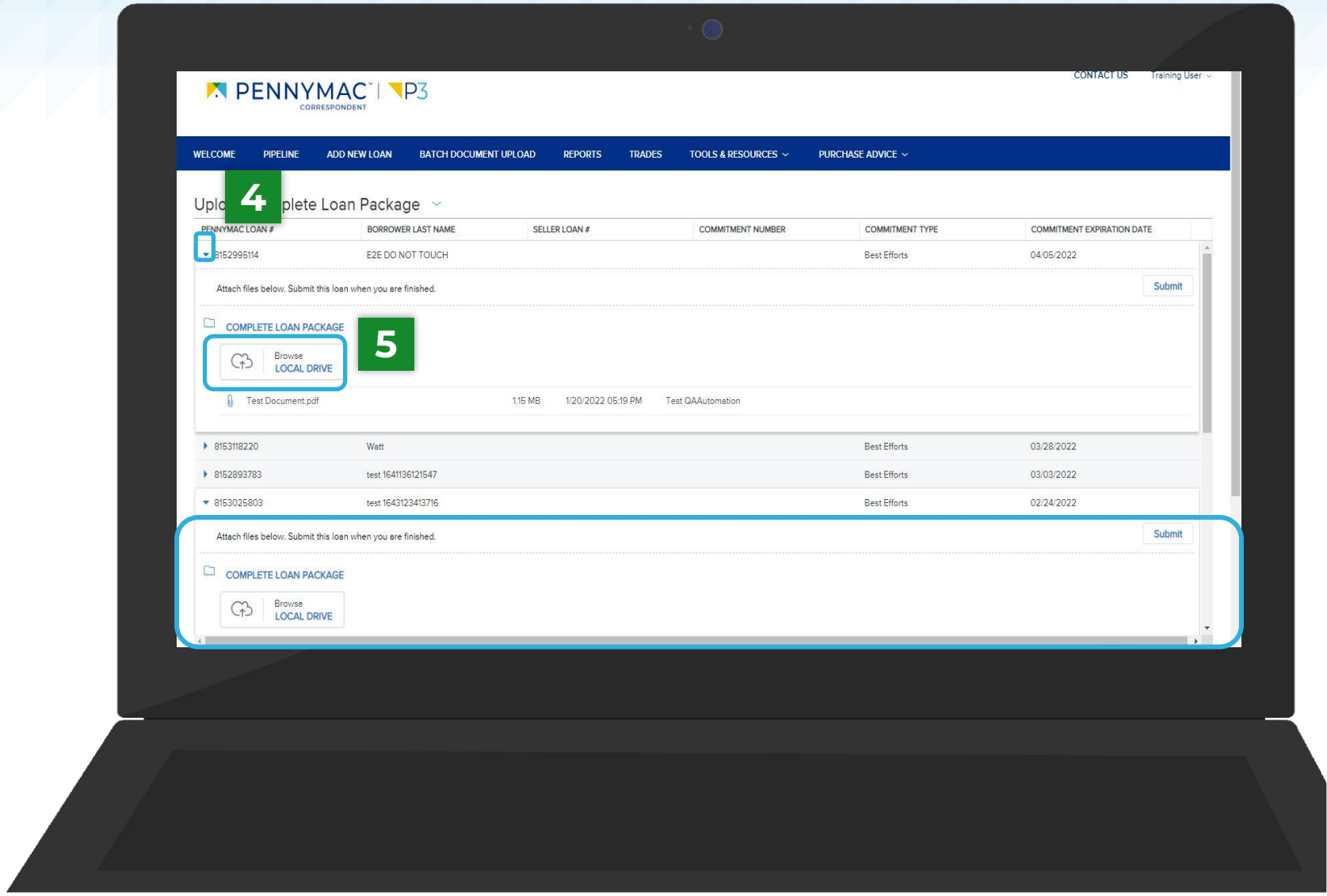
Complete Loan Package

4 Click on the arrow at the left of the loan line.

5 Click the **Browse Local Drive** button in the **Complete Loan Package** folder and select a file from the computer.

The Drag and Drop option is also available to upload documents. The file will appear with a green checkbox when completed.

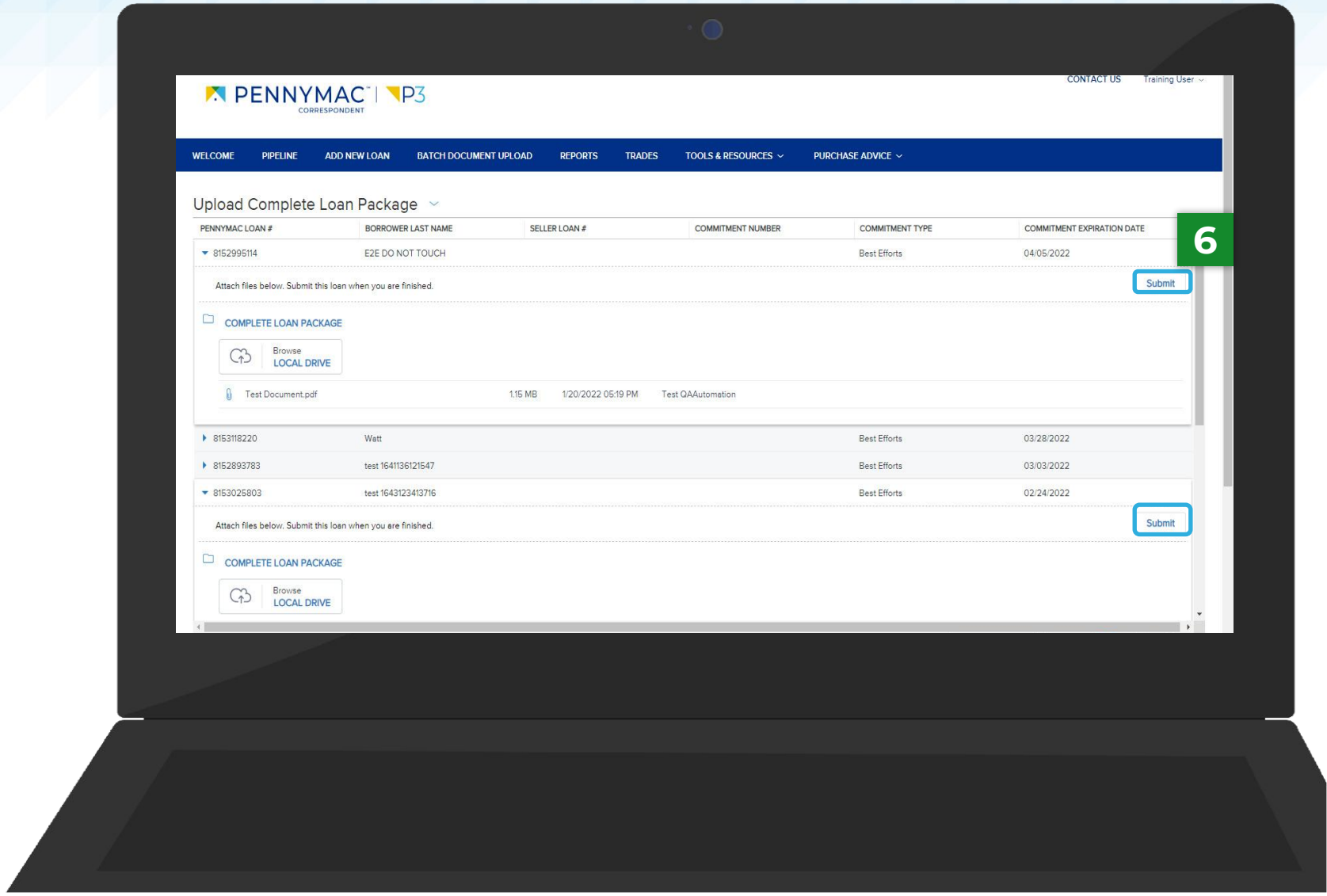
Multiple loan packages can be completed repeating these steps for different loans.



Complete Loan Package

6 Click the Submit button for each loan uploaded to.

With this last step uploading the loan package is complete!



THANK YOU!

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