

# Unacceptable Eligibility

JOB AID

The Job Aid walks you through the steps to understand why a file is unacceptable and how to correct it.

**A** To see why a loan has Unacceptable Eligibility status, follow the next steps:

1. Go to the *Pipeline* tab.
2. Click the Unacceptable Eligibility Delivery tile.

1

2

File Started/Registered	Locked Not Delivered	Allocated Not Delivered
38938 Loans	10000 Loans	139 Loans

Eligibility File Received	Unacceptable Eligibility Delive...	Eligibility Audit Review	Pending Eligibility Conditions
19708 Loans	22 Loans	1286 Loans	3088 Loans

Unacceptable Eligibility ...	Eligibility Rejected	Complete Loan Pkg Received	Unacceptable File Delivery
19 Loans	431 Loans	553 Loans	28 Loans

**B** The loan list displays.

1. Find the loan in the pipeline list or use the search bar in the top header to find loans by their number.
2. Click on the loan to view loan summary.

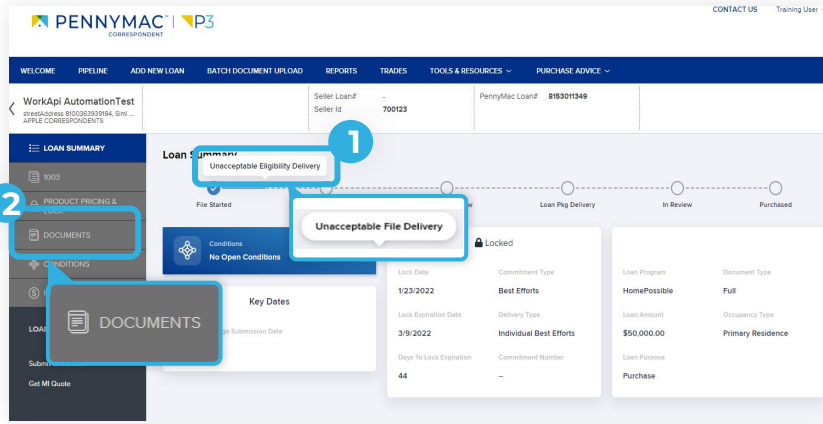
1

2

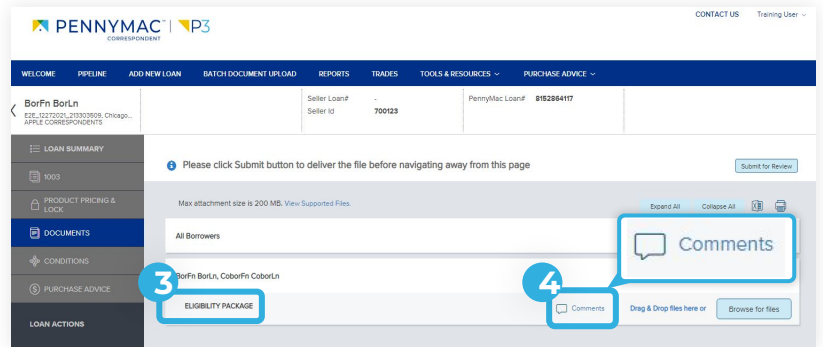
Loan Group	Unacceptable Eligibility ...	Find Loan	PennyMac Loan #	Loan Type	Loan Amount	Note Rate	Loan P
815301674	AutomationTest	CA	Eligibility File Delivery	Conventional	50,000.00	0.000	Home
815301673	AutomationTest	CA	Eligibility File Delivery	Conventional	50,000.00	0.000	Home
8152360237	BoiLn	IL	Eligibility File Delivery	Conventional	200,000.00	2.500	Conf 2
815286407	BoiLn	IL	Eligibility File Delivery	Conventional	200,000.00	0.000	
815286456	BoiLn	IL	Eligibility File Delivery	Conventional	200,000.00	2.250	Conf 2
8152366884	BoiLn	IL	Eligibility File Delivery	Conventional	200,000.00	2.500	Conf 2

**C** The loan summary displays.

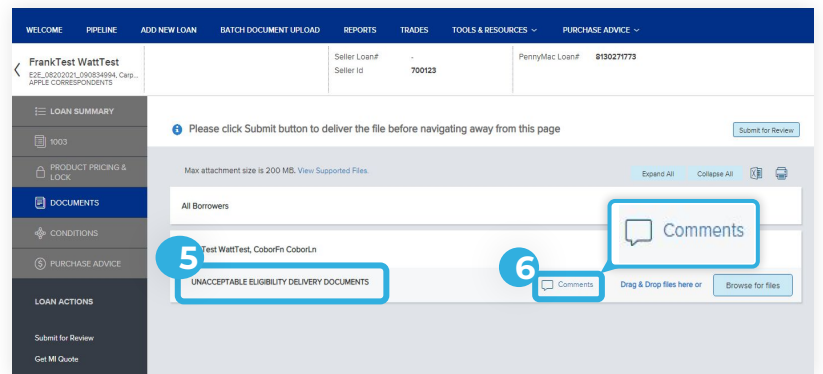
1. Loans in *Unacceptable Eligibility Delivery* will be indicated with a comment above the Loan Summary bar.
2. Navigate to the *Documents* tab.



3. If your loan is trapped for any of the following reasons, you will see the *Eligibility Package* folder:
  - *File uploaded are for an incorrect borrower*
  - *The loan package is incomplete*
  - *File is corrupt*
4. Click the *Comments* link to review why the uploaded *Eligibility Review Package* was not accepted.



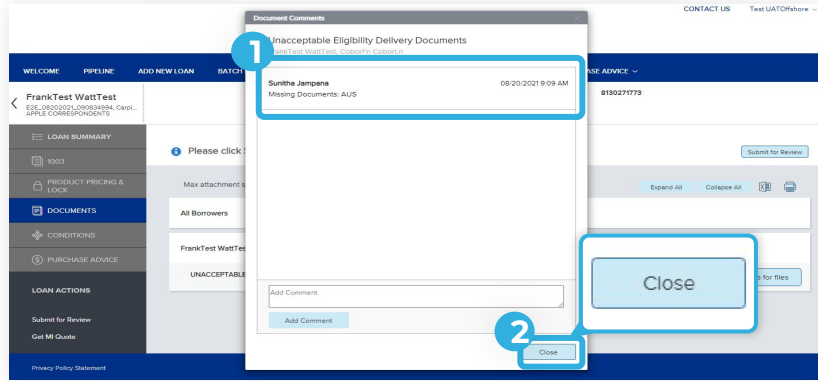
5. If your loan is trapped for any of the following reasons, you will see the *Unacceptable Eligibility Delivery Documents* folder:
  - *Missing specific critical documents*
6. Click the *Comments* link to review the reason(s) why the loan was trapped.



**D** Identify why the file was unacceptable in the pop-up.

**Note:** This process is the same for both the *Eligibility Package* folder and the *Unacceptable Eligibility Delivery Documents* folder.

1. See reason for unacceptable file.
2. Click close button.



**E** To upload required documents, follow the next steps.

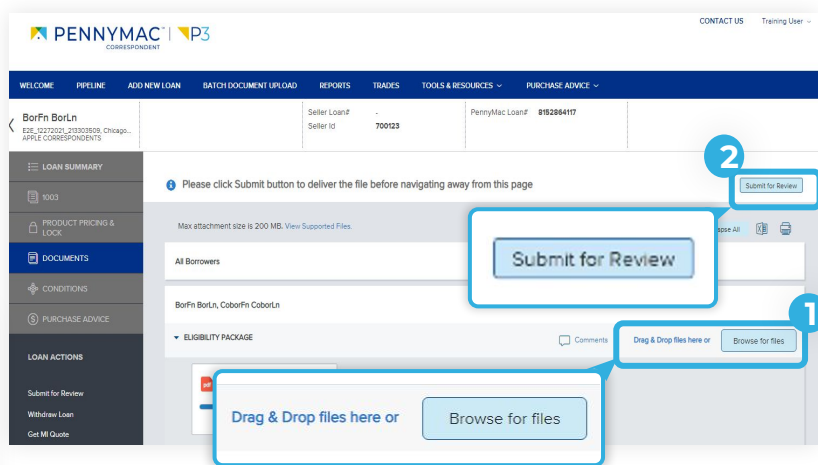
1. Click the Browse for files button to upload documents. The Drag and Drop option can also be used to upload documents.
2. Once the uploading is completed, click the Submit for Review button.



**ATTENTION!**

For trapped loans that display the *Eligibility Package* folder, P3 will not save your original upload. You will need to re-upload the entire correct file before clicking *Submit for Review*.

For trapped loans that display the *Unacceptable Eligibility Delivery Documents* folder, P3 will save your original upload. You will only need to upload the requested missing documentation before clicking *Submit for Review*.



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