

Client Readiness Training

Non Delegated Loan Processing

CONFIDENTIAL & PROPRIETARY



Once a loan has been registered, the loan has to be submitted to Eligibility Review with it's appropriate documentation.

- Go to the **Documents** section of the loan.
- 2 Upload documents using the Drag & Drop files option or Browse for files for selecting files saved in the computer.

WELCOME PIPELINE	ADD NEW LOAP	N BATCH DOCUMENT UPLOAD	REPORTS	TRADES	TOOLS & RESOURCES ~	PURCHASE ADVIC	E~			
Andy America Property Street Address Ape APPLE CORRESPONDENTS	tment 2, Bur		Sell	er Id	DI-C03_v3.4 700123	PennyMac Loan≢	8151151264			
E LOAN SUMMARY		Please click Submit butto	n to deliver	the file befo	re navigating away from	his page				Submit for Revie
	5.8	Max attachment size is 200 MB. V	lew Supported F	iles.					Expend All	Collapse All
		All Borrowers						-	_	
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S PURCHASE ADVIC	E	ELIGIBILITY PACKAGE						Comments	Drag & Drop files here	or Browse for files
LOAN ACTIONS										
Submit for Review										
Get MI Quote										



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

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

, Andy America		Seller Loan#	DI-C03_v3.4	PennyMac Loan#	8151151264		-
Property Street Address Apertment 2, Bur APPLE CORRESPONDENTS		Seller Id	700123				5
	Please click Submit button to a	deliver the file before	navigating away from	his page			Submit for Review
	Max attachment size is 200 MB. View Su	pported Files.				Expend All C	oliapse All
	All Borrowers						
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LOAN ACTIONS	▼ ELIGIBILITY PACKAGE				Comm	ents Drag & Drop files here or	Browse for files
Submit for Review Get MI Quote	Apple Corresponde 183 Comple	x 156 KB 100 % ted	ſ	Close and Refresh			
	Apple Correspondents Test Loan Con	iplete Loan Package.pdf	188 KB 01/24/202	2 2:41 PM Training User			Ŧ
	Apple Correspondents Test Loan Con	nplete Loan Package.pdf	188 KB 02/17/202	2 4:24 PM Training User			Ŧ



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A submission overview page pops-up to review the loan. Click **Continue** to confirm the loan submission.

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Now the loan is in the queue for PennyMac to review and all the editing options will be disabled.

	P 3	Are you sure you want to loan at this time?	o submit this	CONTACT US	Training User 🗸
WELCOME PIPELINE ADD NEW LOA Andy America Property Street Address Apartment 2, Burb Apple Correspondents	N BATCH DOCUMENT UPLOAD REI	PORTS TRA Cancel Seller Loan# Seller Id 700123	Continue Mac Loan# 8151151264		
E LOAN SUMMARY	Submit Loan				
	Submission Overview Application Date 10/10/2020	Submission Status Not Submitted	Initial Submittal Date	Last Submittal Date	
(§) PURCHASE ADVICE					
Submit for Review Get MI Guote					



- 5 When PennyMac receives the loan, it appears in the Eligibility File Received tile in the pipeline.
- 6
 - If PennyMac decides that additional documentation is needed, this is notified by email (if configured correctly) and the loan will appear in the **Pending Eligibility Conditions** tile.

VELCOME PIPELINE ADD NEW	LOAN BATCH DOCUMENT UPLOAD REPO	RTS TRADES TOOLS & RESOURCES ~	PURCHASE ADVICE ~	
LOAN OPTIONS	Loan Groups		Find Loar	PennyMac Loan # VQ Advanced Filter
HANNEL All © Correspondent Delegated © Correspondent Non-Delegated	All Active Loans 39946 Loans	Started/Registered	Locked Not Delivered 94 Loans	Allocated Not Delivered 0 Loans
	Eligibility File Received 20220 Loans	Unacceptable Eligibility Delive 27 Loans	Eligibility Audit Review 1308 Loans	Pending Eligibility Conditions 3219 Loans
	Eligibility Approved 418 Loans	Eligibility Rejected 452 Loans	Complete Loan Pkg Received 608 Loans	Unacceptable File Delivery 29 Loans
	Audit Review	Pending Conditions	Purchase Review	Cleared for Purchase





- 2 Click the Select a Document Upload View drop-down menu.
- 3 Select the **Upload Eligibility Package** option.





- 4 Find the loan in the list and click on the arrow at the left of the loan line.
- 5 Click the Browse LOCAL DRIVE button and select a file from the computer.
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The Drag and Drop option is also available to upload documents. The file will appear with a green checkbox when completed.



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





6 After uploading the file, click the **Submit** button.

With this last step the Uploading Eligibility package is completed!

A green notification will pop-up to confirm the loan has been submitted.

P3 EATCH DOCUMENT UPLOAD WER LAST NAME stname 1624382741911 finished.	REPORTS TRADES	TOOLS & RESOURCES Y PURCHASE A	NDVICE	COMMITMENT EXPIRATION DATE 08/25/2021 Submit
BATCH DOCUMENT UPLOAD	REPORTS TRADES	TOOLS & RESOURCES ~ PURCHASE A	ADVICE ~ COMMITMENT TYPE Best Efforts	COMMITMENT EXPIRATION DATE 08/25/2021 Submit
DWER LAST NAME stname 1624382741911 finished.	SELLER LOAN #	COMMITMENT NUMBER	COMMITMENT TYPE Best Efforts	COMMITMENT EXPIRATION DATE 08/25/2021
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finished.				Submit
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THANK YOU!

