CLIENT READINESS

Role-Based Resources

Non-Delegated

August/2020

OBJECTIVES

In this document, Pennymac Performance Portal (P3) users will find links to training support material that will provide assistance with performing key P3 functionalities specific to their user role. A repository of all the material can be found on the P3 Training Support Material page.

Process Guides
walk through each loan processing task step-by-step

Training Modules
are broken-up into bite-sized pieces for on demand learning

NAVIGATING THESE RESOURCES

Click on any of [Go to Role Resource] **to view role-based learning resources on a page!**

1 Administrator

Manage user profiles and have a wide range of loan level access

[Go to Administrator Resource]

2 Seller Rep

Registers loans, uploads and submits documentation and reviews the pipeline

[Go to Seller Rep Resource]

3 Seller Lock Only

Add on to the Seller Rep role allowing the locking of loans.

[Go to Seller Lock Only Resource]

4 Seller Processor

Executes the loan process, views pricing, but no lock capability

[Go to Seller Processor Resource]

5 Seller Lock Desk

Oversees capital markets and secondary marketing transactions

[Go to Seller Lock Desk Resource]

6 View Only

Managerial oversight with no transacting ability at the loan level

[Go to View Only Resource]

7 Rate Sheet View Only

Prospective client or person interested in pricing but no loan level access

[Go to Rate Sheet View Only Resource]

8 Post Funding Adjustments

Manages funding correction requests

[Go to Post Funding Adj. Resource]

9 Trailing Documents

Views outstanding final documents such as Recorded Mortgage or Final Title Policy.

[Go to Trailing Documents]

PENNYMAC CORRESPONDENT

ADMINISTRATOR

INFORMATION TO KNOW

Step-by-step process guides:

- Admin Job Aid
- Registering a Loan
- Pricing a Loan
- Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

Training modules:

- Introduction to P3
- Logging into P3

- Admin Functions
- Register a Non-Delegated Loan
- Pricing a Non-Delegated Loan
- Upload Eligibility Package
- Unacceptable Eligibility Delivery
- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
- Unacceptable File Delivery
- Submit Pending Condition Documents
- Review Purchase Advice
- Complete Post Funding Actions

WHAT TO EXPECT

- Splash Announcement communicating new system enhancements
- Feedback Form providing a place to tell us your likes and wishes

RESOURCES IF YOU HAVE QUESTIONS

- CorrespondentMandatory@pnmac.com for mandatory loans lock desk
- CorrespondentBest@pnmac.com for correspondent loans lock desk
- CorrespondentPricing@pnmac.com for pricing lock desk
- 1-800-Penny38 (1-800-736-6938) for additional questions

Menu

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SELLER REP

INFORMATION TO KNOW

Step-by-step process guides:

- Registering a Loan
- Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

Training modules:

- Introduction to P3
- Logging into P3
- Register a Non-Delegated Loan

- Upload Eligibility Package
- Unacceptable Eligibility Delivery
- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
- Unacceptable File Delivery
- Submit Pending Condition Documents
- Pull Reports

WHAT TO EXPECT

- Splash Announcement communicating new system enhancements
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SELLER LOCK ONLY

INFORMATION TO KNOW

Step-by-step process guides:

- Registering a Loan
- Pricing a Loan
- Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

Training modules:

- Introduction to P3
- Logging into P3

- Register a Non-Delegated Loan
- Pricing a Non-Delegated Loan
- Upload Eligibility Package
- Unacceptable Eligibility Delivery
- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
- Unacceptable File Delivery
- Submit Pending Condition Documents
- Pull Reports

WHAT TO EXPECT

- Same expectations as the Seller Rep Role
- Functions as Add-on to Seller Rep Role allowing Seller Rep to lock loans, view pricing and the pipeline

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SELLER PROCESSOR

INFORMATION TO KNOW

Step-by-step process guides:

- Registering a Loan Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

- Upload Eligibility Package
- Unacceptable Eligibility Delivery
- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
- Unacceptable File Delivery
- Submit Pending Condition Documents
- Review Purchase Advice

Training modules:

- Introduction to P3
- Logging into P3
- Register a Non-Delegated Loan

WHAT TO EXPECT

- Splash Announcement communicating new system enhancements
- Feedback Form providing a place to tell us your likes and wishes

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CORRESPONDENT

SELLER LOCK DESK

INFORMATION TO KNOW

Step-by-step process guides:

- Registering a Loan
- Pricing a Loan
- Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

Training modules:

- Introduction to P3
- Logging into P3
- Register a Non-Delegated Loan

- Pricing a Non-Delegated Loan
- Upload Eligibility Package
- Unacceptable Eligibility Delivery
- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
- Unacceptable File Delivery
- Submit Pending Condition Documents
- Review Purchase Advice
- Complete Post Funding Actions

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CORRESPONDENT

VIEW ONLY

INFORMATION TO KNOW

Step-by-step process guides:

- Upload Eligibility Package
- Confirmation of Eligibility
- Submit Pending Eligibility Condition Documents
- Complete Loan Package
- Submit Pending Condition Documents
- Unacceptable File Delivery

- Review Loan Pipeline
- Submit Pending Eligibility Condition Documents
- Confirmation of Eligibility
- Complete Loan Package
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Training modules:

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RATE SHEET VIEW ONLY

INFORMATION TO KNOW

Step-by-step process guides:

- P3 Password Security & Login Guide

Training modules:

- Introduction to P3

- Logging into P3

WHAT TO EXPECT

- Splash Announcement communicating new system enhancements
- Feedback Form providing a place to tell us your likes and wishes

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POST FUNDING ADJUSTMENTS

INFORMATION TO KNOW

Step-by-step process guides:

- P3 Password Security & Login Guide

Training modules:

- Introduction to P3

- Logging into P3

WHAT TO EXPECT

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TRAILING DOCUMENTS

INFORMATION TO KNOW

Step-by-step process guides:

- P3 Password Security & Login Guide

Training modules:

- Introduction to P3

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THANK YOU!