

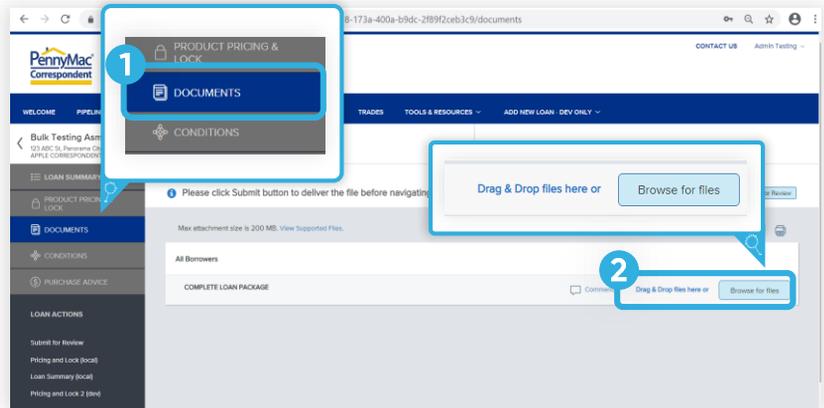
Complete Loan Package

JOB AID

This Job Aid walks you through how to upload a complete loan package in PennyMac's Portal both for Delegated and Non Delegated loans.

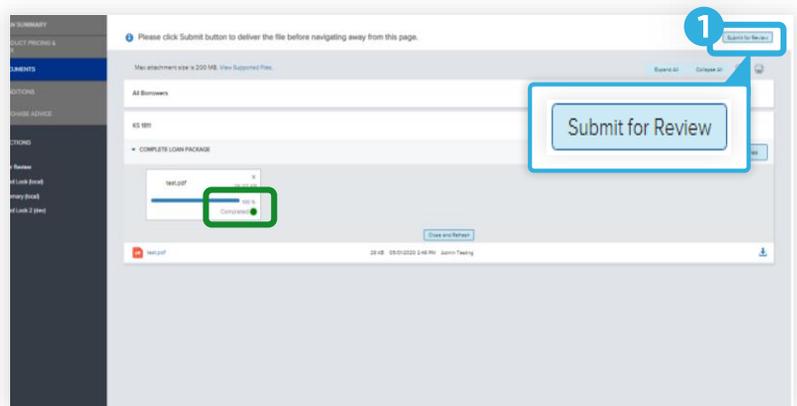
A Loan packages have to be uploaded by submitting documentation:

1. 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.



B Once the uploading is completed, the uploaded document will appear as **Completed** in the screen:

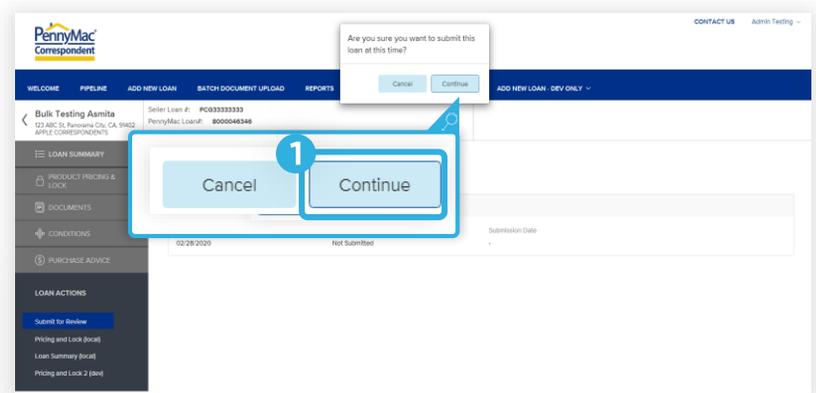
1. Click the **Submit for review** button.



C A submission overview page pops-up to submit the loan:

1. Click **Continue** to confirm the loan submission.

After completing these steps, the loan is in the Complete Loan Package Received section in the pipeline.



ATTENTION!

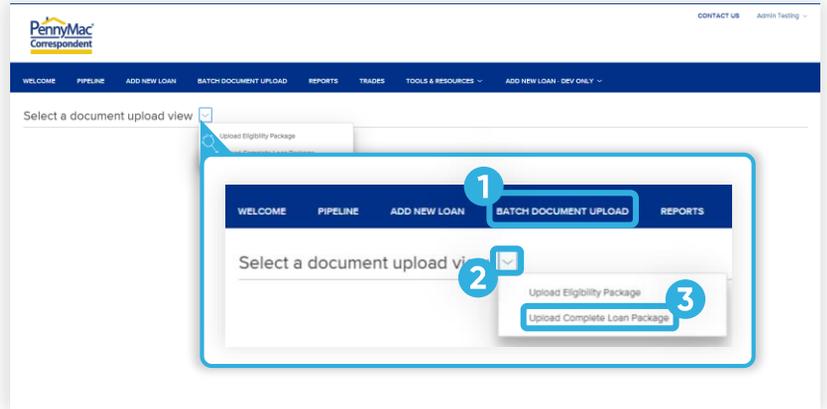
Now the loan is in the queue for PennyMac to review and all the editing options will be disabled.

Now, let's see how to upload multiple loans at once to complete the loan package process!

A Once in the Portal main page:

1. Click the *Batch Document Upload* tab.
2. Click the **Select a Document Upload View** drop-down menu.
3. Select the **Upload Complete Loan Package** option.

Steps 2 & 3 are necessary for clients registered for both Delegated and Non Delegated loans only.

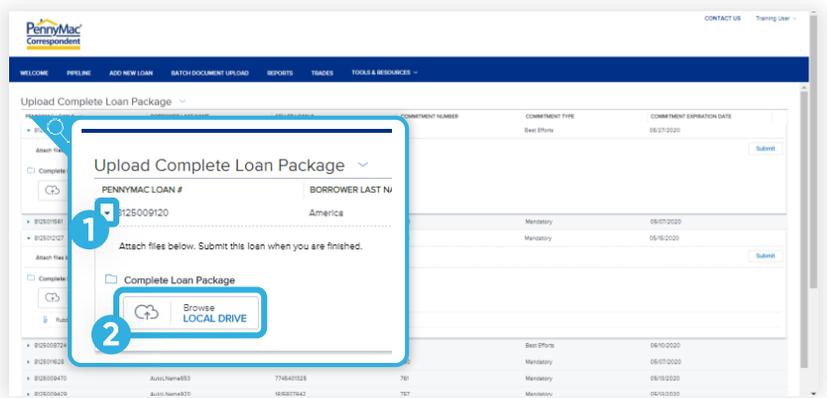


B Once in the Upload Complete Loan Package screen:

1. Find the loan in the list and click on the arrow at the left of the loan line.
2. Click the **Browse LOCAL DRIVE** button and select a file from the computer. The **Drag and Drop** option is also available.

TIP

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

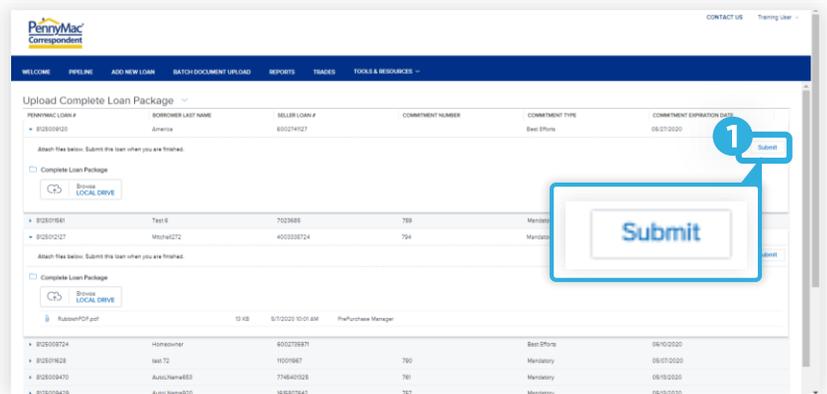


C After uploading the file:

1. Click the **Submit** button.

This step needs to be completed for each loan where documentation/packages have been uploaded.

With this last step the uploading of the loan package is completed!



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