

PennyMac Correspondent Lending Addendum to the Encompass Investor Connect Lender User's Guide

Complete the following steps to successfully deliver loan packages to PennyMac through Encompass Investor Connect.

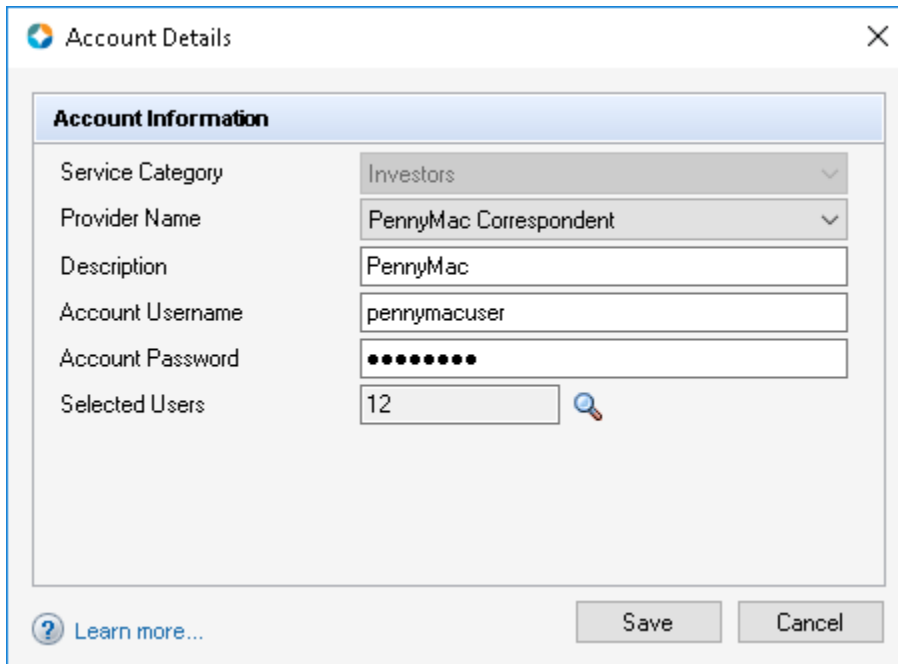
IMPORTANT: Use Encompass Investor Connect to deliver loans to PennyMac only for Registration and Closed Loan Delivery.

Configuring Your Investor Connect Setup

Your administrator needs to complete the following steps when configuring Encompass Investor Connect in the Encompass settings.

Services Password Management

Your Encompass administrator must follow these guidelines when creating the Account Details entry for PennyMac in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



1. Enter your company's **Client ID** in the Account Username field. If you do not have your Client ID please contact, contact [PCG Web Support](#) for help.
2. Enter **pennymac123!** In the Account Password field.

Submitting Data and Document Packages

Encompass users must follow these guidelines when submitting data and document packages:

- On the Add Submission Details section of the Deliver Loans window:
 - Select **Registration** or **Closed Loan Delivery** from the **Submission Type** drop-down list.
 - Select a **Stacking Template** when choosing **Closed Loan Delivery** from the drop-down list.

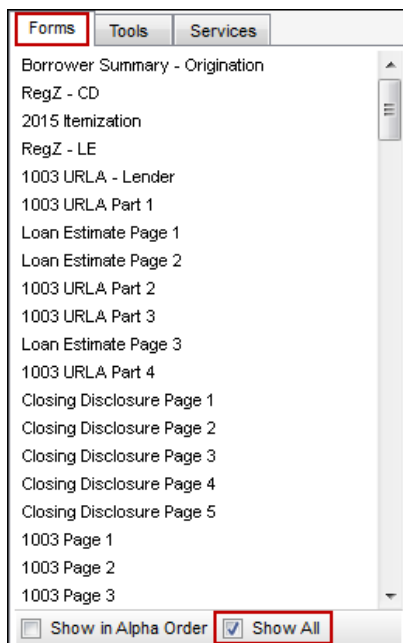
Required Data Fields

When you submit a loan to PennyMac using certain Submission Types (**Complete Loan Package**, **Eligibility Loan Package**, or **Conditions**), PennyMac requires that the following fields in Encompass match the corresponding fields in PennyMac's system.

- Investor Loan Number (field ID 352)
- Seller Loan Number (field ID 364)
- Lender Name (field ID 315)

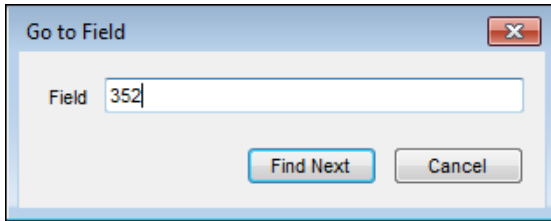
To Add These fields:

1. Open the loan file, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



2. Press **Ctrl+G**.

3. Type the **Field ID** in the field and click **Find Next**.



4. This takes you to the first field. Enter the data, repeat the process for the remaining fields, and then save the loan.