PennyMac Correspondent

Portal Administration
https://correspondentlending.pnmac.com

ADMINISTRATOR FUNCTIONS   (User must have Admin Role access in the portal to perform these functions)

Step	Add New User	Step	Assign Password
1	Select 'Admin' Center link	1	Select 'Admin' Center link
2	Select 'Security Management' link	2	Select 'Security Management' link
3	Select 'User Information' link	3	Select 'User Information' link
4	Click 'Add New' button	4	Select the radio button by the desired user name
5	Enter all required fields	5	Click Assign Password' button
6	Assign Role(s) and Notification Preference(s) by selecting desired option (multiple options acceptable)	6	Enter password
		7	Confirm password
7	Click 'Save' button	8	Unselect 'Send E-mail' checkbox if email not desired
		9	Click 'Save' button
		10	Click 'Yes' to confirm

Step	Edit - User Information	Step	Reset Password*
1	Select 'Admin' Center link	1	Select 'Admin' Center link
2	Select 'Security Management' link	2	Select 'Security Management' link
3	Select 'User Information' link	3	Select 'User Information' link
4	Click User Name link (underlined and in red text)	4	Select the radio button by the desired user name
5	Update data	5	Click 'Reset Password'
6	Click 'Save' button		

Step	Edit - Notification Preferences	Step	Alternative Password Reset*
1	Select 'Admin' Center link	1	Select 'Admin' Center link
2	Select 'Security Management' link	2	Select 'Security Management' link
3	Select 'User Information' link	3	Click 'Reset Password' button
4	Click desired 'User Name' link (underlined and in red text)	4	Enter 'login' name
5	Select Notification Preferences (multiple options acceptable)	5	Click 'Reset'
6	Click 'Save' button		

*Reset options: PennyMac will send an email with a system-generated temporary password to the selected user. After login, the system will prompt the user to change the password.

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USER ROLES

Function / Role	Administrator	Seller Rep	Seller Processor	Secondary Marketing / Lock	Rate Sheet View Only	View Only	Trailing Documents	Post Funding Adjustments	Authorized Trader
Administration	X								
View Pricing	X		X*	X	X*	X*			
Lock Loans	X			X					
Register Loans	X	X	X	X					
View Pipeline	X	X	X	X	X	X			Ability to execute trades with PennyMac. (Note: This is not a login role; it is used as a control for trading only).
Upload & Submit Docs	X	X	X	X					
View Rate Sheets	X			X	X				
Receive Rate Sheet Notification					X				
Submit Trailing Docs	X	X	X	X			X	X	
Request Post Funding Adjustments	X			X				X	

*On locked/allocated loans only