Instructions: To find a specific form, press Ctrl+F (or use “Find” from the Edit Menu) and then search for the information or topic you are looking for. If you don’t find the topic the first time, try variations, different terms or fewer words.

Select the link below to access PRMG’s Product Profiles:

Product Profiles

Select one of the following links to go immediately to that section:

- Appraisal Forms
- PRMG Policies, Procedures and Information
- Training/Instructional Material
- General Forms
- Retail Branch Specific
- Checklists
- FHA Forms
- FHA 203K Forms And Information
- FT360 and Other Technology Release Notes
- VA Forms
- USDA Forms and Links
- Jumbo, Niche and Second Mortgage Product Forms And Information
- Bond/Housing Authority/DPA Products
- State Specific Information
- Compliance Information
- Quality Control Information
- Alternative Funding Solutions AFS
- Brokered Out

APPRAISAL FORMS
- Appraisal Credit Card Authorization Form
- Appraisal Fee Schedule
- Appraisal Order Request Form – Desk Reviews, Field Reviews, AVM and Appraisals
- Appraisal Placement Guide
- Appraisal System Links
- PRMG Appraisal Guidelines
- PRMG Appraisal Reconsideration Form
- PRMG Appraisal Transfer Policy
PRMG VA Appraisal Reconsideration Form
RELS (ResDirect) Appraisal Reconsideration Form
VA Appraisal Fee Schedule
VA Appraisal Transfer Requirements
VA Case Number and Appraisal Request Form
New Construction VA Case Number and Appraisal Request

<<Return to Top>>

PRMG POLICIES, PROCEDURES AND INFORMATION
4506-T - Instructions for Completing
Accessing AllRegs Online
ARM Product Data (Adjustments, Caps, Floor and Margins)
Automated Underwriting System (AUS) Tolerance Requirements
Community Property States
Condo Review FAQs
Condo-PUD Project Review Manual
Credit Refresh Policy
Credit Standards Policy
Day 1 Certainty – AccountCheck Borrower Overview
Day 1 Certainty – AccountChek VOA Sample Report
Day 1 Certainty – Equifax’s The Work Number and Rapid Reporting
Day 1 Certainty – Introducing AccountChek Script
Deal Desk, Loan Scenario and Underwriting Escalation Contact Information
DPA Approval List
DPA- Non-Housing Finance Authority First Lien with DPA Grant Job Aid
Employment Authorization Document (EAD) Codes
Electronic Signature Requirements
Endorsed Platform Links
E-Mail Template for Valuations
E-Sign Consent Form
E-Signing with Adobe Reader
Extended Lock Option
FHA (HUD) FAQ Link
FHA MIP Matrix
FHA Streamline Minimum Requirements for Submission
FT360 Investor Overlay Screen- FastTrac Loan Notes Requirements
Homebuyer Education Courses
HUD Repair Escrows
Instructions for Completing the 92900-A (Retail) (for cases assigned prior to 8/16/16)
Instructions for Completing the 92900-A (Retail) (for cases assigned on or after 8/16/16)
Instructions for Completing VA 26-1802a Applications Prior to 08-01-2016
Instructions for Completing VA 26-1802a Applications On or After 08-01-16
Instructions for Underwriters for Completing Dates on the 92900-LT, 92900-A and 92800 SB
LDP-GSA Instructions
Lock Policies
New Construction - HUD Form 92541 Job Aid
Mortgage Credit Certificate (MCC) Information
Retail Resource Center

Retail Case Number Assignment Requests Instructions
Retail TBD Submissions
Retail TBD Workflow (for Loan Officer not Loan Processors)
Reviewing Estimated HUD-1 (Retail)
VA IRRRL Training PowerPoint
VA Loan Training Guide 2015
VVOE Control Panel
Working with LoanBeam

Borrower Training Material
eDisclosures from a Borrower’s Perspective Video
User Guide - eConsent Borrower Perspective
User Guide - eDisclosures Borrower Perspective

Doc Velocity Training Material
Doc Velocity Training Page (All Materials)

LO Training Support Material
Accessing Acranet
Checking for Early Pay off Penalties
FT360 System Overview Origination 101
FT360 System Overview Origination 201
Link to eDisclosures from a Borrower’s Perspective
Loan Beam
Loan Center Access Management
Mortgage Insurance
WebMax Workflow for Retail Disclosures
Working with Jumbo Loans
Working with Optimal Blue

Processor Training Support Material
Accessing Acranet
FHA Case Connection
HMDA Adverse Action Guide
Loan Processing
Mortgage Insurance
Ordering Tax Transcripts – DataVerify
Processing Overview I
Processing Overview II
Retail Disclosures
Retail Verification of Employment
The Work Number
Working with Jumbo Loans
Verification of Employment

PRMG Technology (IT)
FT360 Training Resources Information Page
IT Support 101 (Working With PRMG IT)
ShoreTel and Polycom Communications (Telephone Systems)

<<Return to Top>>

GENERAL FORMS
4506-T (Editable)
Age Restriction Property Certification
Attached PUD-Condo Warranty Form
Authorization for Social Security Administration To Release SSN Verification (SSA-89)
Bond/Housing Finance Authority Development Request Checklist
Debt-Asset Worksheet
DPA Submission Checklist
Editable 1003 Loan Application
Exception Request Form
FHA/VA Lead Standard Certification for Water Systems
FHA/VA New Construction Documentation
Fraud Alert Confirmation
Gift Letter
HOA Full Lender Condo Review Questionnaire
HOA Full Lender Condo Review Submission Form
HOA Limited Condo Questionnaire - Optional
HOA PUD Questionnaire
Home Possible (Affordable Loan) Data Collection Form
Homes for Heroes Referral Form
Homes for Heroes Referral Program
Income Calculation Worksheet
LDP-GSA Form
Letter of Explanation
Loan Processor Certification Form
Manual Lock Request Form
Notes to Underwriter for Loan Submissions
PIW Borrowers Disclosure Form
PIW Property Ownership Affidavit
Price Exception Form – Branch Manager
Price Exception – Regional Manager
Project Presale Form
Purchase Application Checklist
PreQual Letter (Compliant) – Non-QM
PreQual Letter (Compliant) – QM
Refinance Application Checklist
Request for Disclosures Submission Form
Retail Pre-Qual Denial Guidelines (CP2012-13)
Undisclosed Debt Disclosure

<<Return to Top>>

RETAIL BRANCH SPECIFIC
Arizona Retail Docs Request Form
Florida Retail Doc Request Form
Midwest Retail Doc Request Form
Retail Doc Request Form
Washington Retail Doc Request Form

<<Return to Top>>

CHECKLISTS
203K Underwriting Checklist
Agency DU Portfolio Manufactured Home Checklist
Appraisal Checklist – Condo
Appraisal Checklist - PUD and SFR
Condo Limited Review Checklist (Internal)
Doc Drawer Checklist
Eastern Region Closing Checklist
Eastern Region Opening Guide
Eastern Region Processor Checklist
Eastern Region UW Submission Checklist
Estimated HUD-1 Checklist- Retail
FastTrac CD Checklist
FHA Manufactured Home Checklist
FHA Back to Work Checklist-Retail
FNMA 5-10 Financed Properties Checklist (DU 10.0 or later)
Loan Officer Checklist
Processors File Checklist
Ready For Docs Checklist –Retail
Retail Loan Opener Checklist
Retail Processor Checklist
VA Manufactured Home Checklist

<<Return to Top>>

FHA FORMS
FHA Amendatory Clause and Real Estate Certification
FHA Appraisal Logging Instructions
FHA Case Cancellation Request
FHA Case Number Assignment Request-Retail
FHA Case Transfer Request Form
FHA Comprehensive Risk Assessment
FHA Condo Certification
FHA Gift Funds Job Aid
FHA Identity of Interest
FHA Maximum Mortgage Refinance Worksheets with NTB For Cases ON OR AFTER 9-14-15
Mortgagees Assurance of Completion

<<Return to Top>>

FHA 203K FORMS AND INFORMATION
Checklists
Limited 203K Renovation Checklist
Standard 203K Renovation Checklist
203K Renovation Interview Checklist

Forms
203K Allowable Costs Worksheet
203K Borrowers Acknowledgment- HUD 92900A
203K Borrower (Homeowner)-Contractor Agreement
203K Consultant Identity of Interest Certification
203K Contractor Acceptance Checklist
203K Contractors Resume
203K Good Neighbor Next Door Worksheet
203K Identity of Interest Form
203K Limited Authorization of Release
203K Permit Certification Form
203K Rehabilitation Loan Agreement
203K W-9 Form

Job Aids
203K Benefits of Using a Renovation Consultant
203K Calculating Cash to Close
203K Fee Disclosure and FT360 Job Aid
203K Ineligible Consultant List
203K Information Provided by LOS
203K Originating and Processing Renovation Loans
203K Reminders for Consultants
203K Role of a Renovation Consultant
203K Working With Consultants
PRMG Renovation Flowchart

Other Renovation Documents
203K Consultant Profile
203K Contractor Interview and Review Sheet
203K Mortgagees Assurance of Completion

Training Material
203K Certification Training Presentation
203K Standard Certification – Instructions for Accessing via PRMG’s LMS (Public Course)
203K Limited Training Presentation
203K Standard Training Presentation
203K Realtor Training Presentation
203K Training Video Links
203K FT360 Materials

<<Return to Top>>
FT360 and Other Technology Release Notes
PRMG Lending Technology and LOS System Release Notes

<<Return to Top>>

VA FORMS
VA Blank NOV (Notice of Value)
VA Case Number and Appraisal Request
VA Cash Out Refinance and IRRRL Worksheet
VA Childcare Expense Letter
VA Counseling Checklist (26-0592)
VA Debt Questionnaire
VA Escape Clause
VA Federal Collection Policy Notice (26-0503)
VA IRRRL Case Number Request - Retail
VA IRRRL Worksheet
VA Loan Analysis (26-6393)
VA New Construction Case Number and Appraisal Request
VA Payment Comparison Letter
VA Questionnaire (Debt Letter Procedure, Reserve Status and Nearest Living Relative)
VA Request for Certificate of Eligibility (26-1880)
VA Request for Determination of Value (26-1805)
VA Rights of VA Loan Borrowers (26-8978)
VA Verification of Benefits (26-8937)

<<Return to Top>>

USDA FORMS AND LINKS
USDA Attachment 15 – Origination Stacking Order Checklist
USDA Attachment A - Eligible Household and Repayment Income Worksheet
USDA Attachment A - Eligible Household and Repayment Income Worksheet
USDA Attachment C - Origination Stacking Order Checklist
USDA Attachment E - Electronic Delivery (Where to send files)
USDA CFR Part 3555/Handbook 1-3555 Quick Reference
USDA GUS Submission Requirements
USDA Training and Links
USDA Memo on Standardization Process
USDA Notice to Applicants - Income Disclosure
USDA Request for Single Family Housing Loan Guarantee (3555-21)
USDA UW and Closing Matrix

<<Return to Top>>

JUMBO, NICHE AND SECOND MORTGAGE PRODUCT FORMS AND INFORMATION
Closed End Second Loan Revision Summary Form
Diamond Condo Full Review Warrantable Questionnaire
Diamond Jumbo Eligibility Review Submission Form
Diamond Jumbo Net Tangible Benefits Worksheet
Emerald Full Condo Questionnaire
Emerald Full Condo Submission
Emerald Insurance Condo Questionnaire
Emerald Limited Condo Questionnaire
Emerald Limited Condo Submission
Emerald Loan Submission Form
Expanded Access Bank Statement Calculator
Expanded Access Business Narrative
Expanded Access Condo Questionnaire
Expanded Access Residual Income Worksheet
Expanded Access Submission Form
Gold Jumbo Condo and Attached PUD Submission Form
Gold Jumbo Condo Full Review Questionnaire
Gold Solar Power Certification
Gold Underwriting Submission Checklist
Internal Jumbo and Closed End Second Corporate UW Submission Checklist
Niche Condo Full Review Non-Warrantable Questionnaire
Niche Condo Full Review Warrantable Questionnaire
Niche Condo Review Submission Form
Niche Products Borrower Ability to Repay (ATR) Certification
Niche Products Eligibility Review Submission Form
Niche Products Net Tangible Benefit
Niche Products Residual Income Calculation Form
Niche Products Restricted Stock Worksheet
Silver Medal HOA Questionnaire Form for 2-4 Unit Projects
Silver Medal HOA Questionnaire Form for 5+ Unit Projects
Silver Medal Loan Submission Form
Silver Medal Non-Conforming Initial Loan Submission Checklist
Silver Medal Verbal Verification of Employment
Workflow Process – Jumbo and Niche Products

(<Return to Top>)

BOND/HOUSING AUTHORITY/DPA PRODUCTS
CalHFA Borrower & Lender Affidavit of Loan Analysis Comparison
CalHFA Borrower Affidavit
CalHFA-Data Entry, Disclosure and Doc Process
CalHFA Seller Affidavit
CalHFA Tax Return Affidavit
CalHFA Zip Disclosure
Chenoa Document Request Form
Chenoa FAQ
Chenoa Fund AMI Calculator
Chenoa Fund Program
Chenoa Fund Supplemental Procedures
Chenoa Registration Form
Chenoa Second Mortgage Disclosure
CO CHFA Data Entry And CHFA Upload Process
FL FHA Hillsborough Data Entry, Disclosure and Doc Process
FL Housing Data Entry, Disclosure and Doc Process
FL Lee County Data Entry, Disclosure and Doc Process
FL Miami-Dade Data Entry, Disclosure and Doc Process
Housing Finance Authority First Lien with DPA Grant Job Aid
Housing Finance Authority Second Lien with DPA Grant Job Aid
Housing Authority Mortgage Insurance Rates in FT360
How to Register for eHousingPlus DPA Training Aid
KHC-Data Entry and Disclosure Process
KHC Training Manual
Minnesota Housing Data Entry, Disclosure and Doc Process
Minnesota Housing Start Up Subsidy Recapture Disc Statement and Tennessen Warning Disclosure
Minnesota Step up Tennessen Warning Disclosure
MSHDA Data Entry, Disclosure and Doc Process
OH Housing Data Entry, Disclosure and Doc Process
TX TSHAC Data Entry, Disclosure and Doc Process
WHEDA Data Entry, Disclosures and Doc Process
WSHFC Data Entry and Disclosures
WSHFC First Payment Notification
WSHFC Underwriter Pre Closing Checklist

<Return to Top>

STATE SPECIFIC INFORMATION
All States – State Specific Guidelines
California LE MLDS Addendum
Colorado Tangible Net Benefit Disclosure
Colorado Third Party Fee Disclosure
Illinois Tangible Net Benefit Worksheet
Massachusetts Tangible Net Benefit Worksheet
Massachusetts Title 5 Official Inspection Form
New Mexico Rate Lock Disclosure
Rhode Island Tangible Net Benefit Worksheet
State Specific Net Tangible Benefit
West Virginia Tangible Net Benefit Worksheet

<Return to Top>

QUALITY CONTROL INFORMATION
Loans Requiring Lexis Nexis Reports
Loans Requiring Pre-Funding QC Audits
Minimum Items Required for QC

<Return to Top>

COMPLIANCE INFORMATION
Applicants Intent to Proceed-Retail-TRID
Branch SAR Referral Form
Changed Circumstance Notification
HPMLs - Section 35
PRMG TRID Resource Center Page
QM Common Prepaid Finance Charges (PFCs) and QM Fees
QM Points and Fees Summary
QM Safe Harbor - Rebuttable Presumption
QM Safe Harbor - Rebuttable Presumption (PRMG UW Version)

ALTERNATIVE FUNDING SOLUTIONS (AFS)
AFS Referral Form

BROKERED OUT
Approved Brokered Out List
Brokered Out Policy
New Broker Relation Request and Guidelines Form

Brokered Out Lender Information
Advancial Information
AFR Information
Angel Oak Information
BAC Information
Bank of the Internet (BOFI) Information
Citadel Information
Civic Information
Emigrant Information
Liberty Home Equity Information
Live Well Information
New Penn Information
Oaktree Information
Residential Acceptance Corporation (RAC) Information
Sabadell Information
Sprout Mortgage Information
SunWest Information
TCF Bank Information
Triumph Capital Partners (TCP)
Washington Federal Information

<<Return to Top>>