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 User Guides**
- **PRMG Policies, Procedures and Information**
- **Training/Instructional Material**
- **General Forms**
- **Checklists**
- **FHA Forms**
- **FT360 and Other Technology Release Notes**
- **VA Forms**
- **USDA Forms and Links**
- **Jumbo, Non-QM and Second Mortgage Product Forms And Information**
- **Bond/Housing Authority/DPA Products**
- **State Specific Information**
- **Compliance Information**
- **Quality Control Information**
- **Submission Requirements (TRID)**
- **Doc Order Forms (Branch Specific)**
- **Broker Approval Package and Forms**
- **Broker Onboarding Forms**

**APPRAISAL FORMS**
- **AppraisalScope – Appraisal User ID and Password Form**
- **AppraisalScope – Client Login Navigation**
- **AppraisalScope – Communication with Email Office**
- **AppraisalScope – How to order an Appraisal**
- **AppraisalScope – How to Request a Reconsideration of Value**
- **AppraisalScope Login**
- **Appraisal Credit Card Authorization Form**
- **Appraisal Fee Schedule**
- **Appraisal System Links**
- **PRMG Appraisal Guidelines**
PRMG Appraisal Transfer Policy
PRMG Desk Review and Field Review Placement Guide
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 USER GUIDES
FT360 WebCenter Adding Contact Instructions

<<Return to Top>>

PRMG POLICIES, PROCEDURES AND INFORMATION
4506-T - Instructions for Completing
4506-T Broker Ordering Option Instructions
Accessing AllRegs Online
ARM Product Data (Adjustments, Caps, Floor and Margins)
Automated Underwriting System (AUS) Tolerance Requirements
Broker Compensation Acknowledgement and Agreement
Community Property States
Condo Review FAQs
Condo-PUD Project Review Manual
Corona Fulfillment Center Resources (Center 106 - Western US)
Credit Refresh/Lookback Report Instructions
Credit Refresh/Lookback Report Policy
Credit Standards Policy
Standalone DPA Approval List
Standalone DPA- Non-Housing Finance Authority First Lien with DPA Grant Job Aid
Eastern Region Loan Escalation Policy
Employment Authorization Document (EAD) Codes
Electronic Signature Requirements
E-Mail Template for Valuations
E-Sign Consent Form
E-Signing with Adobe Reader
Extended Lock Option
FT360 Investor Overlay Screen-FastTrac Loan Notes Requirements
FHA (HUD) FAQ Link
FHA MIP Matrix
HMDS Adverse Action Guide
HOA Condo/PUD Best Information/Best Practices
HOA Conventional Full Lender Condo Approval List
Homebuyer (Borrower) Discounts and Privileges (sponsored by Genworth MI)
Homebuyer Education Courses
How To Request Fannie Mae Desktop Originator (DO) Sponsorship
HUD Repair Escrows
Instructions for Closing in a Trust

2/6/2020
Instructions for Lock Verification PRMG Input Form
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
Mortgage Insurance (MI) Quotes from MI Website Tip Sheet
OB Expanded Guidelines Instructions
OFAC Sanctioned Counties
Phoenix Fulfillment Center Resources (Center 117)
Plantation Fulfillment Center Resources (Center 127 – Southeast, Northeast, Midwest, Rocky Mountain Regions)
PRMG +Plus Down Payment Protection Program Information
PRMG Insurance Requirements, Loss Payee and Additional Information
PRMG Product Seasoning Matrix (Informational Only)
PRMG TRID Resource Center Page
PRMG FHA and VA Lender IDs
Property Tax Rate Table
State Tax Impound Chart
Tax Transcript and Tax Return Requirements
Texas Flow Chart 50.a.6
Texas Amendment 50.a.6
Transfer Taxes Workflow Chart
Underwriter Credit Authority Levels
Underwriting Exception Policy
Unison Program Information
USDA Processing Offices by State
UW Submission Step by Step

<<Return to Top>>

TRAINING/INSTRUCTIONAL MATERIAL
8x8 Phone System Training Information
8x8 Phone System Training Information (with Videos)
8x8 Phone System Resource Sheet
Appraisal Logging Underwriter Requirements in FT360
CD Request Checklist Instructions
Automated Underwriting DU and LPA
CD Request Checklist Instructions
Completing a COC CD
Completing the Request for Transcript of Tax Form
Creating a Junior Lien (Piggyback Second) in FT360
Duplicating a new 1st TD Loan in FT360
eConsent Borrower Perspective
DataVerify Procedures (including LDP/GSA) – Services Tab Access
Day 1 Certainty AccountChek - Borrower
Day 1 Certainty AccountChek – Lender
Day 1 Certainty – PRMG Operations
Day 1 Certainty - Wholesale
DPA Cheat Sheet
FHA Mortgagee ID Lookup Table User Instructions
FHLMC System to System FT360 Integration
FT360 New URLA System Training Videos
How to Complete VA Form 26-1880 Requesting a Certificate of Eligibility
Instructions for Accessing PRMG’s LMS
LoanBeam OnDemand Training
MI Training Support Material
Optimal Blue TPO User Guide
PRMG University YouTube Channel
Self-Study Advanced Processor Training (Pre-Underwriting Training) - Genworth
Self-Study Beginning Processor Training (Introduction to Processing Training) - Genworth
Self-Study Mortgage Courses – Arch Academy
Self-Study Mortgage Foundations Training – Radian
SiteXPro User Guide
SpeedPath Master Clock
VA Loan Training Guide 2015
VVOE Control Panel
Wholesale Case Number Assignment Requests Instructions

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

TPO Portal Training Material
Desktop Originator Training for TPO
Desktop Underwriter Training for TPO
TPO Connect Advance Lock Feature Pricing Wizard
TPO Connect AE and AM Training FAQ
TPO Connect AE Q&A
TPO Connect Authenticating Key Dates Docs
TPO Connect Creating and Working with Your Loan
TPO Connect Change of Circumstance
TPO Connect Converting Delivering TBD Loans
TPO Connect Disclosure Tracking
TPO Connect Doc Order Form
TPO Connect Documents and Conditions
TPO Connect eConsent and eSign Consumer Connect Platform
TPO Connect FAQs
TPO Connect and FHA Streamlines
TPO Connect FT360 Basics for Account Executives
TPO Connect Creating a Junior Lien (Piggyback Second) In FT360
TPO Connect Key Dates & Docs
TPO Connect Loan Summary and Key Dates (Disclosure Tracking)
TPO Connect Persona Matrix
TPO Connect Product Pricing Locking Lock Ext
TPO Connect Submission Form Training
TPO Connect Submission Request Form
TPO Connect Product, Pricing and Locking
TPO Connect Requesting Credit and AUS
TPO Connect Reviewing Closing Fees
TPO Connect Running LPA
TPO Connect Submitting and Resubmitting a Loan
TPO Connect User Administration
TPO Connect and VA IRRRL
TPO Freddie Mac Loan Product Advisor (LPA) Approved Credit Vendors List

<Return to Top>

GENERAL FORMS
4506-T (Editable)
Attached PUD-Condo Warranty Form
Authorization for Social Security Administration To Release SSN Verification (SSA-89)
Debt-Asset Worksheet
Standalone DPA Submission Checklist
Exception Request Form
FHA Single-Unit Approval Checklist
FHA Single-Unit Approval Process
FHA Single-Unit Approval Submission Form
FHA Unit In Approved Condo Project Checklist
Fraud Alert Confirmation
Gift Letter
HOA Condo Budget Review Submission Form
HOA FHA Condo Approval Questionnaire (Form 9991)
HOA Conventional Condo Project Addendum for FHA Questionnaire
HOA FNMA/FHLMC Short Form Condo Questionnaire (for Limited Review with Specific Jumbo/Non-QM products)
HOA Full Lender Conventional Condo Review Submission Form
HOA Full Lender Conventional Condo Review Questionnaire
HOA Limited Conventional Condo Questionnaire - Optional
HOA PUD Questionnaire
Income Calculation Worksheet
LDP-GSA Form
Lender Certification Form
Letter of Explanation
Manual Lock Request Form
Notes to Underwriter for Loan Submissions
Project Presale Form
Undisclosed Debt Disclosure
Wholesale Disclosure Package

<Return to Top>

CHECKLISTS
Agency DU Portfolio Manufactured Home Checklist
Appraisal Checklist – Condo
Appraisal Checklist - PUD and SFR
CD Request Checklist
Wholesale Resource Center

“Built by Originators for Originators”

Condo Limited Review Checklist (Internal)
FHA Manual Underwriting Checklist
FHA Manufactured Home Checklist
FNMA 5-10 Financed Properties Checklist (DU 10.0 or later)
Inter Vivos Revocable Trust Checklist
Power of Attorney Checklist
Wholesale Loan Opener 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 Transfer Request Form
FHA Case Number Assignment Request
FHA Comprehensive Risk Assessment
FHA Condo Certification (For Cases Assigned Prior to 10/15/2019)
FHA Gift Funds Job Aid
FHA Identity of Interest
FHA Maximum Mortgage Refinance Worksheets Including Streamlines with NTB
FHA Mortgagees Assurance of Completion
FHA Lead Standard Certification for Water Systems
FHA New Construction Documentation
FHA Single-Unit Approval Checklist
FHA Single-Unit Approval Process
FHA Single-Unit Approval Submission Form
HOA FHA Condo Approval Questionnaire (Form 9991)
HOA Conventional Condo Project Addendum for FHA Questionnaire

<<Return to Top>>

FT360 and Other Technology Release Notes
PRMG Lending Technology and LOS System Release Notes

<<Return to Top>>

VA FORMS
Certificate of Eligibility (COE) Disclosure
How to Complete VA Form 26-1880 Requesting a Certificate of Eligibility
How to Order a VA Case Assignment
VA Blank NOV (Notice of Value)
VA Calculator Tool - Full Entitlement Loans Funded On Or After 1-1-20
VA Calculator Tool - Partial Entitlement Loans Funded On Or After 1-1-20
VA Case Number and Appraisal Request
VA Cash Out Refinance and IRRRL Worksheet
VA Cash Out Refinance Comparison Certificate (Initial) – FT360 Requirements to Print
VA Childcare Expense Letter
VA Community Property Requirements
VA Counseling Checklist (26-0592)
VA Debt Questionnaire
VA Escape Clause
VA Federal Collection Policy Notice (26-0503)
VA IRRRL Case Number Request
VA IRRRL Reduction Certification - FT360 Requirements to Print
VA IRRRL Worksheet
VA Loan Guaranty Calculation Worksheet
VA Loan Guaranty Calculation Examples For Loans Closed On Or After 1/1/20
VA Loan Guaranty Calculation Examples For Loans Closed Prior To 1/1/20
VA Loan Guaranty Calculation Worksheet For Loans Closed Prior To 1/1/20
VA Loan Guaranty Calculation Worksheet Full Entitlement Closed On Or After 1-1-20
VA Loan Guaranty Calculation Worksheet Partial Entitlement Closed On Or After 1-1-20
VA Loan Limits 2018
VA Loan Limits 2019
VA Loan Limits 2020
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)
VA 2018 Calculator Tool
VA 2019 Calculator Tool

<<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 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 Access for Brokers
USDA GUS Loan File Review Guide
USDA GUS Submission Requirements
USDA Training and Links
USDA Memo on Standardization Process
USDA New Construction Requirements
USDA Notice to Applicants - Income Disclosure
USDA Request for Single Family Housing Loan Guarantee (3555-21)
USDA UW and Closing Matrix
JUMBO, NON-QM AND SECOND MORTGAGE PRODUCT FORMS AND INFORMATION

Jumbo Turn Times
Non-QM Turn Times

Borrower Ability To Repay Certification
Diamond Jumbo Eligibility Review Submission Form
Diamond Condo Full Review Warrantable Questionnaire
Diamond Jumbo Net Tangible Benefits Worksheet
Expanded Access Asset Depletion Worksheet
Expanded Access Bank Statement Calculator and Business Narrative
Expanded Access Business Narrative (For Files Locked Prior to 10/09/2019 only)
Expanded Access Submission Checklist
Expanded Access Submission Form
Internal Jumbo Corporate UW Submission Checklist
Investor Solution Certification Form
Investor Solution DSCR Calculator
Investor Solution Submission Checklist
Non-Conforming First Loan Revision Summary Form
Personal Guaranty Agreement
TCF HELOC Application Disclosure (Broker to Complete)
TCF HELOC Closing Form
TCF HELOC Florida Anti-Coercion Insurance Notice Form 1376 (Broker to Complete)
TCF HELOC Notice and Authorization (TCF Form 765) (Broker to Complete)
TCF HELOC PRMG Workflow
TCF HELOC Taxpayer Consent Form
TCF HELOC Wholesale File Flow Overview
TCF HELOC Wholesale Review Checklist (TCF 1871) (PRMG to Complete)
TCF HELOC Wholesale Submission Form (TCF 717) (PRMG to Complete)
TCF HELOC Worksheet (TCF Form 1017) (Broker and PRMG to Complete)
Understanding HELOCs and HELOC LTV Calculations
Workflow Process – Jumbo and Non-QM Products

<<Return to Top>>

BOND/HOUSING AUTHORITY/DPA PRODUCTS

CalHFA Borrower Affidavit
CalHFA Seller Affidavit
CalHFA Tax Return Affidavit
CalHFA TPO Internal Operations Instruction
CalHFA Zip Disclosure
Chenoa Fund AMI Calculator
Chenoa Second Mortgage Disclosure
Standalone DPA Closing Checklist
DPA Cheat Sheet
Housing Finance Authority (HFA)/DPA Workflow for FT360 Job Aid
Housing Finance Authority (HFA)First Lien with DPA Grant Job Aid
Housing Finance Authority (HFA) Lien with Second Lien Job Aid
Housing Finance Authority (HFA) Mortgage Insurance Rates in FT360
Housing Finance Authority (HFA) New DPA Process FAQ
Housing Finance Authority (HFA) TPO Broker Submission Instructions (including Chenoa)
WHEDA Data Entry, Disclosures and Doc Process
WHEDA Home Advantage Program

<<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>>

COMPLIANCE INFORMATION
Anti-Steering Safe Harbor Disclosure Legal with Broker Instructions
Branch SAR Referral Form
Broker Affiliate Certification 2015
Broker Cert for Applicants Intent to Proceed
Changed Circumstance Notification
COC Cheat Sheet
CP2013-04 Affiliated Service Providers
HMDA Addendum 2018 Sample
HPMLs - Section 35
Lender Paid Compensation vs. Borrower Paid Compensation
Mavent Cheat Sheet
PRMG HMDA 2018 Resource Center Page
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)
South Carolina Attorney and Insurance Preference Job Aid
Wholesale Applicants Intent to Proceed-TRID

<<Return to Top>>

QUALITY CONTROL INFORMATION
Loans Requiring Lexis Nexis Reports
Loans Requiring Pre-Funding QC Audits
Minimum Items Required for QC
Validating the Loan Officer or Client QC Status

<<Return to Top>>

SUBMISSION REQUIREMENTS (TRID)
Conventional Complete Loan Checklist
FHA Non-Credit Qualifying Complete Loan Checklist
FHA Standard Complete Loan Checklist
FHA Streamline Credit Qualifying Complete Loan Checklist
Registration - Wholesale Submission
Registration - Wholesale TBD Submission
USDA Complete Loan Checklist
VA IRRRL Credit Qualifying Complete Loan Checklist
VA IRRRL Non-Credit Qualifying Complete Loan Checklist
VA Standard Complete Loan Checklist

<<Return to Top>>

DOC ORDER FORMS (BRANCH SPECIFIC)
Corona California Fulfillment Center Doc Order Form
Phoenix Arizona Fulfillment Center Doc Order Form
Plantation Florida Fulfillment Center (includes Mountain, Midwest, Northeast and Southeast Regions) Doc Order Form
Santa Ana California Fulfillment Center Doc Order Form

<<Return to Top>>

BROKER APPROVAL PACKAGE AND FORMS
Lender Paid Compensation Plan Selection Form
FHA Addendum
PRMG Broker Package (includes all required forms)
Branch Addition Form
VA Addendum
Broker Package – CHENOA Addendum
Broker Renewal Package

<<Return to Top>>

BROKER ONBOARDING FORMS
Broker Quick Reference and FAQs
Prepping Your CD
PRMG’s eSigning Process
Submitting Your File
TPO Condition Submission
Wholesale Contact and Tip Sheet

<<Return to Top>>