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

- Turn Times
- Appraisal Forms
- PRMG Policies, Procedures and Information
- Training/Instructional Material
- General Forms
- Checklists
- VA Forms
- USDA Forms and Links
- Jumbo, Non-QM and Second Mortgage Product Forms and Information
- State Specific Forms
- Compliance Information
- Submission Requirements (TRID)

TURN TIMES
- Non-Delegated Correspondent Turn Times
- Jumbo Turn Times
- Non-QM Turn Times

<< Return to Top >>

APPRaisal FORMS
- PRMG Appraisal Guidelines
- PRMG Appraisal Transfer Policy
- VA Appraisal Transfer Requirements

<< 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
Correspondent Contact List
Credit Refresh/Lookback Report Instructions
Credit Refresh/Lookback Report Policy
Delegated Correspondent Quick Reference Guide
Standalone DPA Approval List
Electronic Signature Requirements
Employment Authorization Document (EAD) Codes
E-Mail Template for Valuations
E-Sign Consent Form
Extended Lock Option
FHA (HUD) FAQ Link
FHA MIP Matrix
FHA Streamline Minimum Requirements for Submission
FT360 Investor Overlay Screen- FastTrac Loan Notes Requirements
HOA Condo/PUD Best Information/Best Practices
HOA Conventional Full Lender Condo Approval List
Homebuyer Education Courses
HUD Repair Escrows
Instructions for Closing in a Trust
Instructions for Completing the 92900-A (Correspondent–Conditional)
Instructions for Completing the 92900-A (Correspondent-Unconditional)
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
Seasoned Loan Policy
Mortgage Credit Certificates Information
OB Expanded Guidelines Instructions
OFAC Sanctioned Counties
PRMG +Plus Down Payment Protection Program Information
PRMG Insurance Requirements and Additional Information
PRMG Loss Payee- Correspondent
PRMG Product Seasoning Matrix (Informational Only)
PRMG TRID Resource Center Page
Property Tax Rate Table
Scenario Desk Announcement
State Tax Impound Schedule
Tax Transcript and Tax Return Requirements
Texas Flow Chart 50.a.6
Texas Amendment 50.a.6
Transfer Taxes Workflow Chart
Unison Program Information
USDA Processing Offices by State
VA 2018 Calculator Tool
VA 2019 Calculator Tool
VA Attachment B -Geographical Regions for Residual Income Guidelines
VA Attachment C -Loan Guaranty and Required Downpayment Examples
VA Community Property Requirements
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
VA Loan Limits 2018
VA Loan Limits 2019

TRAINING/INSTRUCTIONAL MATERIAL
Correspondent Case Number Assignment Requests Instructions
Correspondent Loan Estimate (LE) Job Aid
Correspondent Portal User Manual
FHA Mortgagee ID Lookup Table User Instructions
How to Complete VA Form 26-1880 Requesting a Certificate of Eligibility
Instructions for Completing VA 1802a Applications Prior to 08-01-2016
MI Training Support Material
Non-Delegated Upload Instructions
Optimal Blue Correspondent 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
VA Loan Training Guide 2015
Working with LoanBeam

TPO Portal Training Material
TPO Connect Conditions
TPO Connect Persona Matrix

GENERAL FORMS
4506-T (Editable)
Affordable Loan Data Collection Form
Age Restriction Property Certification
Attached PUD-Condo Warranty Form
Authorization for Social Security Administration To Release SSN Verification (SSA-89)
Bank Correspondent Lending Application Package
Correspondent Doc Order Form
Correspondent LDP-GSA Form
Correspondent Loan Estimate Certification
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
FHA/VA Lead Standard Certification for Water Systems
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 Questionnaire
HOA Full Lender Conventional Condo Review Submission Form
HOA Limited Conventional Condo Questionnaire
HOA PUD Questionnaire
Income Calculation Worksheet
Letter of Explanation
LDP-GSA Form
Manual Lock Request Form
Notes to Underwriter for Loan Submissions
Project Presale Form
Undisclosed Debt Disclosure

CHECKLISTS
Agency DU Portfolio Manufactured Home Checklist
Appraisal Checklist – Condo
Appraisal Checklist - PUD and SFR
CD Request Checklist
Condo Limited Review Checklist (Internal)
Correspondent Compliance Review 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
VA Manufactured Home Checklist

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 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 Worksheet
VA Loan Analysis (26-6393)
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 2020
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 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 GUS Loan File Review Guide
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

JUMBO, NON-QM AND SECOND MORTGAGE PRODUCT FORMS AND INFORMATION
Borrower Ability To Repay Certification
Diamond Condo Full Review Warrantable Questionnaire
Diamond Jumbo Eligibility Review Submission Form
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 Taxpayer Consent Form

STATE SPECIFIC FORMS
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
State Guidelines
West Virginia Tangible Net Benefit Worksheet

COMPLIANCE INFORMATION
Correspondent Affiliate Certification
PRMG TRID Resource Center Page
QM Common Prepaid Finance Charges (PFCs) and QM Fees
QM Points and Fees Summary
QM Safe Harbor - Rebuttable Presumption
South Carolina Attorney and Insurance Preference Job Aid

CORRESPONDENT APPROVAL PACKAGE AND FORMS
Correspondent Approval Policy
Delegated Correspondent Loan Purchase Agreement
FHA Principal-Authorized Agency Agreement
Non-Delegated Correspondent Loan Purchase Agreement
PRMG Correspondent Application Package – Delegated (includes all required forms)
PRMG Correspondent Application Package – Non-Delegated (includes all required forms)
PRMG Profit Margin Request Form
VA Addendum to PRMG Loan Purchase Agreement

FHA FORMS
FHA Amendatory Clause and Real Estate Certification
FHA Appraisal Logging Instructions
FHA Case Cancellation Request
PRODUCT & PRICING
How to Price VA IRRRLs and FHA Streamlines

SUBMISSION REQUIREMENTS (TRID)
Correspondent Loan Submission Form (TRID Revised)
Correspondent Submission Requirements (TRID Revised)