

Loan Guaranty Service | A Key To Homeownership For Those Who Served

Program Participant Management (PPM) Portal: Tasks

September 2024

VA



U.S. Department
of Veterans Affairs

Objectives

At the end of today's session, learners should be able to:

- ▶ Navigate the PPM Portal with more familiarity
- ▶ Submit applications for New Agents and Underwriters (UWs)
- ▶ Complete the Renewal or Validation Process
- ▶ Understand how applications and processes will be completed in the PPM Portal.



Agenda

- ▶ Overview of Applications
- ▶ Add Agent Application
- ▶ Add UW Application – Returned to Submitter Process
- ▶ Renewal Application (for lenders with Auto Authority)

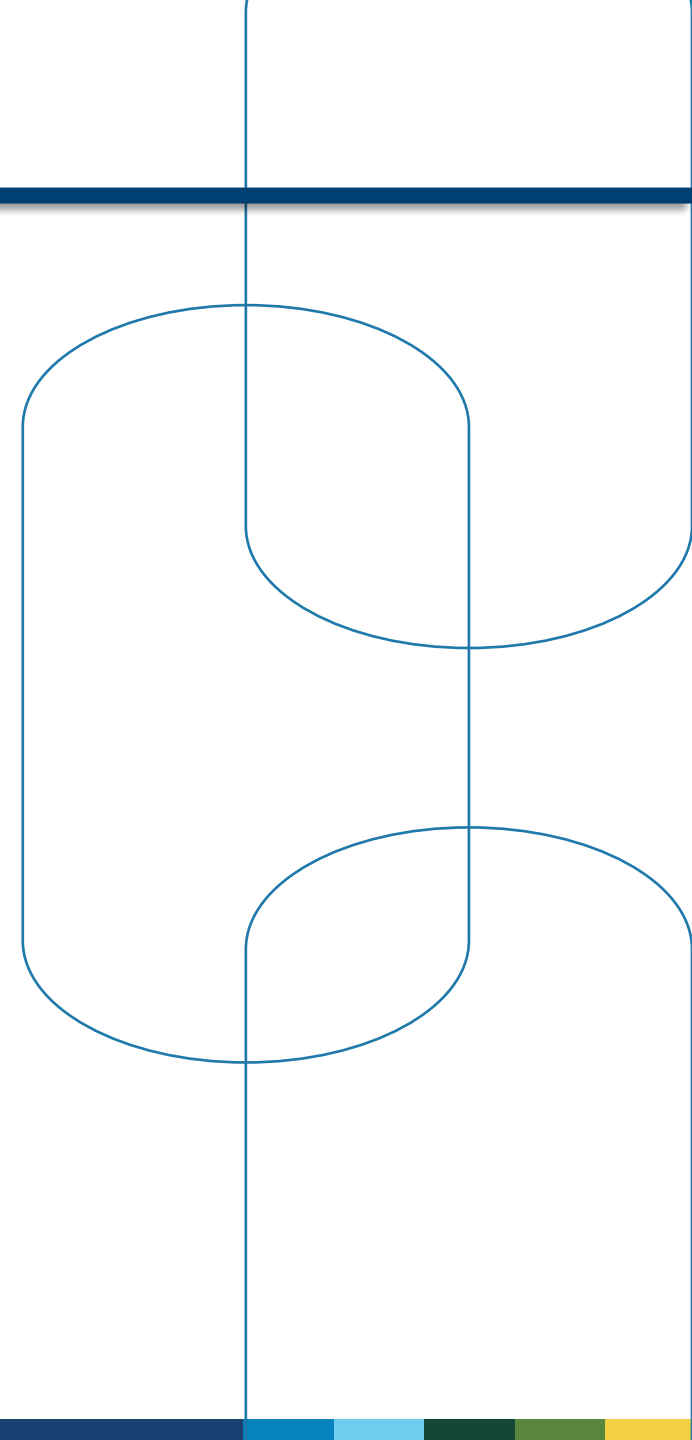


PPM Overview

- ▶ PPM is a self-service portal for lenders to manage their own profiles, submit applications and renewals, submit lender payments, and other lender maintenance functions.
- ▶ VA will require lenders to establish a new role of VA Relationship Manager (VARM), which will be responsible for completing processes in the portal, such as:
 - Submitting UW and Staff Appraisal Reviewer (SAR) applications and included fee payments.
 - Ensuring that the lender's profile information, including lender's address and Points of Contact are updated in the PPM Portal.
 - Submitting annual renewals for any Agent relationships and Automatic Authority for non-supervised lenders.
 - Completing a required annual validation of the lender Profile information.
 - Performing a regular validation of other VARMS for the lender.
- ▶ The PPM Portal will allow VA to process lender applications, renewals, and other requests in an automated and streamlined method.
 - Lenders will receive requests for more information and payment failures through the portal via the PPM lender Home Page.

Expected Benefits of PPM Portal

- ▶ Paper processes will be greatly reduced for lenders.
- ▶ Applications and renewals will be electronically tracked.
- ▶ The PPM system will integrate the payments and application submissions.
- ▶ Lenders will be able to independently add, remove, or update VARMs, Agents, POCs, UWs, and SARs, through the PPM portal. (New Agents, UWs, SARs, will require VA review and approval.)



Logging In

- ▶ PPM Access link:
 - From LGYHub
 - <https://lgy.va.gov/lgyhub/>
- ▶ Sign-on through ID.me interface.

Applications Overview and Agent Application

Applications Overview

Home Company Information Points of Contact VA Relationship Managers **Application** More ▾

Applications
All Application Statuses ▾

6 items • Sorted by Application Type • Filtered by All applications - Application Type • Updated a few seconds ago

	Applicati... ▾	Name ▾	Contact Na... ▾	Application... ↑ ▾	Status ▾	Statu... ▾	Sub... ▾	Created By ▾
1	ID-00001292	OME LOANS LLC		Authority Upgrade	Pending	6/12/2024	6/12/2024	brVincent varm
2	ID-00001305		Sno Leo	UW	Pending	6/12/2024	6/12/2024	brVincent varm
3	ID-00001275	OME LOANS LLC	brVincent varm	VARM	Pending	6/6/2024	6/6/2024	brVincent varm

- ▶ Applications are most of the tasks that are completed in PPM, outside of regular updates to lender information, points of contact, and other business as usual.
- ▶ Applications will appear in the 'Application' tab in the following statuses:
 - ▶ Draft, Pending, Approved, Denied, Returned to Submitter, Expired, Canceled.
- ▶ Applications also appear on the lender Home Page, though approved or expired applications will only appear on this list for 15 days.

Add Agent

- ▶ Select 'Add Agent Relationship' from the 'Lender's Agents' tab. (Icon 1)

Home Company Information Points of Contact VA Relationship Managers SAR/UWs **Lender's Agents** More

Active Agents (0) **1** Add Agent Relationship End Relationship

Inactive Agents (0)

Applications (6)

6 items • Updated a few seconds ago

	Agent Company Name	Status	Created Date	Application ID
1	Bank of Mom	Expired	5/16/2024, 9:21 AM	ID-00001057
2	BANK	Expired	5/22/2024, 4:21 PM	ID-00001160
3	FINANCIAL	Expired	5/22/2024, 4:21 PM	ID-00001161
4	BANK	Pending	5/29/2024, 3:59 PM	ID-00001220
5	Bank of Mom	Pending	5/30/2024, 9:45 AM	ID-00001224

Add Agent: Search

Add New Agent Relationship

Account Details

Lender Name: MORTGAGE CORP	DBA Name:	Lender ID: 07	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Find Agent Information

* Select Lender ID or Federal Tax ID to search for an Agent

Lender ID **1**
 Federal Tax ID

* Lender ID:

2

- ▶ The Application opens in a new browser tab.
- ▶ Select either the 'Lender ID' or 'Federal Tax ID' option (Icon 1) and populate the field with the Agent's information (Icon 2).
- ▶ Agent must have an existing and active VA Lender ID with LGY PPM to be recognized by VA as an Agent.
- ▶ Select 'Next' to search PPM for the Agent.

Add Agent: Confirm Agent Found

Agent Information Found

Agent Company Name HOME LOANS LLC
DBA Name:
Federal Tax ID: 26
Lender ID: 6

* Would you like to continue with adding this Agent?

Yes

Previous Next

- ▶ If the Agent is found in the portal, the next screen will show the lender's information. (Icon 1)
- ▶ If the information is correct, select 'Yes' from the menu labeled 'Would you like to continue with adding this Agent?' (Icon 2)
- ▶ Select 'Next' to continue. (Icon 3)

Add Agent: Certification & Disclosure

CONFIRM AGENT AND SUPPLEMENTAL INFORMATION

OMB Approved 2900-0252
Respondent Burden: 5 Minutes
Expiration Date: 6/20/2026

IMPORTANT - READ THE INFORMATION AND INSTRUCTIONS CAREFULLY BEFORE COMPLETING THIS FORM

PRIVACY ACT INFORMATION: Agents cannot be approved to process loans for a sponsoring lender unless a completed application form has been received (38 U.S.C. 3702 and 3710). We need this information to establish sponsor-agent relationships. VA will not disclose information collected on this form to any source other than what has been authorized under the Privacy Act of 1974 or Title 38, Code of Federal Regulations 1.576 for routine uses (for example: authorize release of information to Congress when requested on behalf of a lender) as identified in the VA system of records, 55VA26 , Loan Guaranty Home, Condominium and Manufactured Home Loan Applicant Records, Specially Adapted Housing Applicant Records, and Vendee Loan Applicant Records - VA, published in the Federal Register.

RESPONDENT BURDEN: Agent recognition must be obtained prior to closing any loans using the sponsor-agent relationship. Title 38, U.S.C., section 3702 and 3710 authorizes collection of this information. We estimate that you will need an average of 5 minutes to review the instructions, find the information, and complete this form. VA cannot conduct or sponsor a collection of information unless a valid OMB control number is displayed. You are not required to respond to a collection of information if this number is not displayed. Valid OMB control numbers can be located on the OMB Internet Page at <http://www.reginfo.gov/public/do/PRAMain>. If desired, you can call 1-800-827-1000 to obtain information on where to send comments or suggestions about this form.

Complete the following supplemental information to add the Agent:

- Payment & Application Certification: I acknowledge that the fee being collected is a non-refundable application fee. A refund for the fee will not be granted after the application is submitted except in cases of a system error.
- Lender Disclosure: The sponsoring Lender will take full responsibility for all acts, errors, or omissions of the agent and its employees, and will honor any interest rate lock-in agreements on the lender's behalf made by the agent.

1

- ▶ Carefully read the 'Confirm Agent and Supplemental Information' certification statement.
- ▶ Confirm the 'Payment & Application Certification' and 'Lender Disclosure' affirmations by selecting the check boxes. (Icon 1)
- ▶ Select 'Next' to continue. (Icon 2)

Previous

Next

2

Add Agent: Upload Corporate Resolution

Do you need to upload a Resolution for this Agent?

* Document Category
PPM

* Document Type
Corporate Resolution

Please use the approved format:
.pdf

Upload a Corporation Resolution Document

Upload Files Or drop files

OR

Associate Existing File
1 of 1 item • 0 items selected

Document Name	Document Type
<input type="radio"/> TEST PDF	Blanket Resolution

Previous Next

- ▶ Lenders must upload a Blanket or Corporate Resolution using a PDF format or select an existing Blanket Resolution (Icon 3).
- ▶ Select 'Document Category' and 'Document Type' from the menus. (Icon 1)
- ▶ Use the 'Upload a Corporation Resolution Document' field to upload the document. (Icon 2)
- ▶ Select 'Next' to continue. (Icon 4)

Add Agent: Payment and Submission

- ▶ Confirm the 'Payment Information' and 'Agent Included in Payment' information.
- ▶ If this is the only Agent Application you are submitting at this time, select 'No' to answer the question 'Would you like to add another Agent?' (Icon 1) and then select 'Submit' (Icon 2).
- ▶ If you would like to submit another Agent (up to 10) Select 'Yes,' then select 'Submit.' The process will begin again at the 'Search' step.
- ▶ Completed Agent Applications will appear on the lender application statuses page.

Payment Information

Payment Amount:

Account Number: XXXX2345

Nickname:

Agent Included in Payment

Showing 1 of 1 item

Agent Name	DBA Name	Lender ID
HOME LOANS LLC		

*Would you like to add another agent?

1

--None--

--None--

Yes

No

Associated Document

Showing 1 of 1 item

Document Name	Document Type	File Size
Test document for testing	Corporate Resolution	35,987

2

Previous

Submit

Add Agent: Application Complete

- ▶ Once the previous page is completed, a notice will appear that the application has been successfully completed. (Icon 1)

1

Agent applications have been successfully created.

Finish

Underwriter Application

Add Underwriter (UW) Application: Search

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 07	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Find Underwriter

* Underwriter Search:

- Social Security Number (SSN)
- SAR/UW ID

1

- ▶ Select the Add UW button from the SAR/UW tab of the Lender Profile to open this page.
- ▶ Select either Social Security Number or SAR/UW ID from the Underwriter Search Options. (Icon 1)
- ▶ Enter the number into the field.
- ▶ Select 'Next' to continue. (Icon 2)

2

Next

Add UW: Disclosures

Account Details

1

Name: MORTGAGE CORP	DBA Name:	Lender ID: 07:	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

2

NON-SUPERVISED LENDER'S NOMINATION & RECOMMENDATION OF CREDIT UNDERWRITER

OMB Approved No. 2900-0253
Respondent Burden: 20 Minutes
Expiration Date: 05/31/2026

IMPORTANT: This form is only to be used by non supervised lenders when requesting approval of nominations for credit underwriters.

PRIVACY ACT INFORMATION: VA will not disclose information collected on this form to any source other than what has been authorized under the Privacy Act of 1974 or Title 38, Code of Federal Regulations 1.576 for routine uses (i.e., information may be disclosed to Congress when requested on behalf of a lender) as identified in the VA system of records, 55VA26, Loan Guaranty Home, Condominium and Manufactured Home Loan Applicant Records, Specially Adapted Housing Applicant Records and Vendee Loan Applicant Records - VA, and published in the Federal Register. No approval as credit underwriter may be made unless a completed application form has been received (38 U.S.C. 3702 and 3710). Your obligation to respond is required to obtain or retain benefit. Giving us your SSN account information is voluntary. Refusal to provide your SSN by itself will not result in the denial of your application. VA will not deny an applicant for refusing to provide his or her SSN unless the disclosure of the SSN is required by a Federal Statute of law in effect prior to January 1, 1975, and still in effect.

RESPONDENT BURDEN: We need this information to confirm that lenders' underwriters are qualified to determine that all loans to be closed on an automatic basis meet VA's credit underwriting standards. Title 38, United States Code, allows us to ask for this information. We estimate that you will need an average of 20 minutes to review the instructions, find the information and complete this form. VA cannot conduct or sponsor a collection of information unless a valid OMB control number is displayed. Valid OMB control numbers can be located on the OMB Internet Page at: www.reginfo.gov/public/do/PRAMain. If desired, you can call 1-800-827-1000 to get information on where to send comments or suggestions about this form.

QUALIFICATION: At least 3 years experience in processing, pre-underwriting, or underwriting mortgage loans with **at least 1 year** of most recent 3 years making underwriting decisions on VA loans or a current Certified Residential Underwriter (CRU) or Accredited Residential Underwriter (ARU) designation from the Mortgage Bankers Association.

- ▶ Review the information (Icon 1) and disclosures (Icon 2).
- ▶ Select 'Next' to continue. (Icon 3)

Previous

Next

3

Add UW: UW Information

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 0750640000	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Underwriter Information

1

* First Name Bryce	* Direct Email bryce.canyon@nat.pk
Middle Name	* Phone 8889997777
* Last Name Canyon	Phone Ext
Suffix	* I AM CURRENTLY APPROVED AS A VA-UNDERWRITER ⓘ Yes

SSN:
222-55-5888

SAR/UW ID:

Business Address

* Address 32 Canyon C	State UT
* City BC City	* Zip Code 33333

- ▶ Fill out the UW Information, completing all required fields. (Icon 1)
- ▶ Select 'Next' to continue. (Icon 2)

2

Previous Next

Add UW: Employment History 1

Account Details

1ST PREFERENCE MORTGAGE CORP
Lender Authority:
Not Supervised with Auto Authority

DBA Name:

State Level Lender Authority:

Le
0750640000

LAPP Indicator:
Yes

Company Status:
Active

Probation:
No

2

1

UW EMPLOYMENT HISTORY

* Date of Employment - From
Jun 7, 2016

* Date of Employment - To
Jun 3, 2024

3

UW EMPLOYMENT INFORMATION

* Position Title
Underwriter
Principal Duties

* Principle Duties

Complete this field.

* % of Time Devoted To Underwriting by Type - Conventional
33

* % of Time Devoted To Underwriting by Type - FHA
33

* % of Time Devoted To Underwriting by Type - VA
34

- ▶ Begin completing the UW Employment History (Icon 1), noting all employment that counts toward the VA UW requirements shown on the disclosure.
- ▶ Note periods of unemployment as well.
- ▶ Start with the dates (Icon 2), then 'UW Employment Information' (Icon 3).

Add Underwriter (UW) - Employment History 2

▼ NAME AND ADDRESS OF EMPLOYER **1**

* Employer Name

* Employer Address

* Employer City

* Employer State

* Employer Zip Code

▼ CONTACT PERSON AT EMPLOYER **2**

First Name

Middle Name

Last Name

Title

Phone Number

Enter the digits of the phone number, including dashes, beginning with the area code. To enter an extension, enter a space and an 'x' followed by the extension number. EX: 555-123-4567 x9876.

Email

3
Next

- ▶ Continue filling out the information for this employment record.
- ▶ Enter data for 'Name and Address of Employer.' (Icon 1)
- ▶ Enter data for 'Contact Person at Employer.' (Icon 2)
- ▶ Select 'Next' when you have completed the entry for this employment record. (Icon 3)

Add UW: Employment Record Options

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 07:	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

1 Employment record(s) has been created for this Underwriter.

Do you want to:

- None--
- 2** Add additional UW Employment History
- Edit UW Employment History
- Continue with Application

Employer Name	Unemployed	Date of Employment - From	Date of Employment -To
1 Desert Bluffs LCL		Jun 7, 2016	Jun 3, 2024

3 Next

- ▶ The employment record you added will now be included as an item in the employment history. (Icon 1)
- ▶ To add additional employment records, select 'Add additional UW Employment History' from the menu (Icon 2), and then select 'Next' (Icon 3).
- ▶ You can also choose to 'Edit UW Employment History.' (Icon 2)
- ▶ When all applicable employment records have been added, select 'Continue with Application' from the menu (Icon 2), and then select 'Next' (Icon 3).

Add UW: Apprentice Indicator

Account Details

Name:
MORTGAGE CORP

DBA Name:

Lender ID:
0750640000

Company Status:
Active

Lender Authority:
Non-Supervised with Auto Authority

State Level Lender Authority:

LAPP Indicator:
Yes

Probation:
No

UW Apprentice Indicator: No

Answer the following question(s): **1**

* I am currently designated as a CRU or ARU by the MBA

No

* Do You have at least 3 years experience in processing, pre-underwriting, or underwriting mortgage loans

Yes

* Do you have at least 1 year of the most recent 3 years making underwriting decisions on VA loans

Yes

Previous

Next **2**

UW Apprentice Indicator: Yes

Answer the following question(s):

* I am currently designated as a CRU or ARU by the MBA

No

* Do You have at least 3 years experience in processing, pre-underwriting, or underwriting mortgage loans

No

- ▶ Answer the questions on the UW Apprentice Indicator by selecting from the drop-down menus under each question. (Icon 1)
- ▶ The Indicator will display whether the UW will need to be an Apprentice based on how the answers align with VA policy.
- ▶ Select 'Next' (Icon 2) to continue once all questions displayed have been answered.

Add UW: Certification

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 0	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Please review the following Certifications:

1

Certification in lieu of Signatures by UW and Lender Principal Officer
WE HEREBY NOMINATE the above named employee to act as our VA underwriter. The nominee has demonstrated a high level of integrity, trust, professional ethics and technical ability as an underwriter. Based on the qualifications established by VA, we find the nominee to be qualified. We certify the nominee is not supervised by an individual who is a branch manager or other person with production responsibilities. We, the undersigned, agree to promptly notify the VA regional office having jurisdiction to any change in the status of the nominee.

Lender Admin has the authority to submit the form on behalf of a Lender Principal Officer.

Payment & Application Certification of the UW
I acknowledge that the fee being collected is a non-refundable application fee. A refund for the fee will not be granted after the application is submitted except in cases of a system error.

Certification
I CERTIFY THAT the foregoing is true to the best of my knowledge. I agree that I will not use any publicity, advertising plaques, certificates, or other devices which imply a special relationship with the Department of Veterans

Please review the following Certifications:

Certification in lieu of Signatures by UW and Lender Principal Officer

Error: All required fields **must** be completed, please review the fields highlighted below:

3

Payment & Application Certification of the UW

Error: All required fields **must** be completed, please review the fields highlighted below:

Certification

Error: All required fields **must** be completed, please review the fields highlighted below:

4

Previous

Next

- ▶ Review all three Certifications. (Icon 1)
- ▶ Select the checkboxes to agree to each Certification. (Icon 2)
- ▶ The lender must agree to all three Certifications to move forward with the application. (Icon 3)
- ▶ Select 'Next' to continue. (Icon 4)

Add UW: Upload Documents

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID:	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator:	Probation:

Upload Document(s)

Please use one of the approved formats: **PDF**

* Document Category
PPM

* Document Type **1**
Resume

* Upload Documents **2**
[Upload Files](#) Or drop files

PDF Test document for testing.pdf

- ▶ Upload the UW resume and ARU/CRU certificate, if applicable to the UW.
- ▶ Use menus to select category and type (Icon 1) and the 'Upload Documents' options to add the file (Icon 2). Remember that PDFs are the only acceptable file format.
- ▶ Select 'Next' to continue. (Icon 3)

Upload Document(s)

Please use one of the approved formats: **PDF**

* Document Category
PPM

* Document Type
ARU/CRU Certificate

* Upload Documents

Add UW: Payment & Documents

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 0'	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Payment Information

Payment Amount: \$100
Count of Underwriter: 1
Payment Account: - 2345

Underwriters Included in Payment
Showing 1 of 1 item

First Name	Last Name	SAR/UW ID	UW Apprentice Indicator
Bryce	Canyon		No

Associated Document
Showing 2 of 2 items

Document Name	Document Type	File Size
Test document for testing	Resume	35,987
		35,987

* Do you want to add more files?
No

Please select a choice.

* Would you like to add one more Underwriter?
No

Previous Next

- ▶ Review 'Payment Info,' 'Underwriters Included,' and 'Associated Document.' (Icon 1)
- ▶ Answer the document question and the Underwriter question. (Icon 2)
- ▶ Select 'Next' to either continue or go back to add more information. (Icon 3)

Add UW: Multiple Submissions

- ▶ Users can add up to five UWs through this process.
- ▶ Screen will show the payment information, documents, and count of UWs being added.
- ▶ Selecting to add a sixth UW will result in an error message.

Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No
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▼ Payment Information

Payment Amount: \$500
Count of Underwriter: 5
Payment Account: - 2345

Underwriters Included in Payment			
5 of 5 items • 0 items selected			
First Name	Last Name	SAR/UW ID	UW Apprentice Indic...
Under	Writerone		No
Under	Writertwo		No
Under	Writerthree		No
Under	Writerfour		Yes
Under	Writerfive		No

Associated Document		
5 of 5 items • 0 items selected		
Document Name	Document Type	File Size
Test document for testing	Resume	35,987
Test document for testing	Resume	35,987
Test document for testing	Resume	35,987
Test document for testing	Resume	35,987
Test document for testing	Resume	35,987

Add UW: Submit Application

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 07!	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Payment Information

Payment Amount: \$100
Count of Underwriter: 1
Payment Account: - 2345

1

Underwriters Included in Payment			
Showing 1 of 1 item			
First Name	Last Name	SAR/UW ID	UW Apprentice Indicator
Bryce	Canyon		No

Associated Document		
Showing 2 of 2 items		
Document Name	Document Type	File Size
Test document for testing	Resume	35,987
Test document for testing	ARU/CRU Certificate	35,987

Previous **Submit**

2

- ▶ Review Payment Info, Underwriters Included, and Associated Document. (Icon 1).
- ▶ Select 'Submit' to complete the Application and send to VA for review. (Icon 2)

Add UW: Application Submitted

1 Your Credit Underwriter application(s) was successfully submitted.

Showing 1 of 1 item

First Name	Middle Name	Last Name	Application ID
Bryce		Canyon	ID-00001265

2 Finish

- ▶ The success message will appear, including a record of all UW applications that have been submitted. (Icon 1) Select 'Finish' to return to the Lender Profile. (Icon 2)

Return to Submitter Process

Applications
Actionable Items - Returned to Submitter ▼

1 item • Sorted by Application ID • Updated a few seconds ago

Search this list...



1

Draft (0)

Pending (0)

Cancelled (0)

Expired (0)

Returned to Sub... (1)

ID-00001265

2

UW

Returned to Submitter

6/4/2024

- ▶ Returned items appear on the Returned to Submitter list on the Lender Profile Home Page. (Icon 1)
- ▶ VARMs receive an email that includes details on missing information.
- ▶ The email is included in the Documents section of the application.
- ▶ Select the Application ID to open the application. (Icon 2)

Return to Submitter: Add Info & Resubmit

The screenshot displays a web application interface for managing an application. At the top right, there are 'Edit' and 'Resubmit' buttons, with the 'Resubmit' button circled in red and labeled '3'. Below this, the application details are shown: Application ID-00001372, Application Type UW, Name MORTGAGE CORP, DBA Name, Lender ID 0, Status Returned to Submitter, and Status Date 6/27/2024. The 'Documents' tab is selected and circled in red with a '1'. Below the tab, there is a 'Documents (2)' section with a settings icon, a refresh icon, and an 'Add Files' button circled in red with a '2'. A table lists two documents: 'Test document for testing' and 'Revised Test document for testing 0627'. The table has columns for Document Name, Document Type, Status, Created Date, Created By, and Document Visible To.

Document Name	Document Type	Status	Created Date	Created By	Document Visible To
1 Test document for testing	Resume	Ready to View	6/27/2024, 11:12 AM	brViolet varm	Public
2 Revised Test document for testing 0627					

- ▶ Review the application against the email you received.
- ▶ Add any missing information or documents to the application by using the 'Documents' tab, (Icon 1) and the Add Files button (Icon 2).
- ▶ Select 'Resubmit' to return the application for continued review when all missing information has been added. (Icon 3)

Return to Submitter: Application Resubmitted

- ▶ Once the user selects 'Resubmit,' the application will be *immediately* resubmitted, and a pop-up window will appear notifying the user. (Icon 1)
- ▶ The application status will change from 'Returned to Submitter,' back to 'Pending.' (Icon 2).

The screenshot displays a web application interface with a table of application records. A dialog box is open, titled 'Resubmit the Application', with a red circle '1' next to the title. Below the title is a green notification bar that says 'Application has been resubmitted.' Below the dialog box, a card shows application details for ID-00001372, with a red circle '2' next to the 'Status' field, which is now 'Pending'.

Name	DBA Name	Lender ID	Status	Status Date
MORTGAGE CORP		0'	Returned to Submitter	6/27/2024

Resubmit the Application

1

Application has been resubmitted.

Application ID-00001372

Application Type	Name	DBA Name	Lender ID	Status	Status Date
UW	MORTGAGE CORP		0'	Pending	6/27/2024

2

Annual Renewals and Validations

Renewals & Validations Overview

- ▶ All lenders must renew or validate once a year, based on end of lender's fiscal year.
- ▶ Renewal
 - For Non-Supervised lenders with Auto Authority.
 - Requires full review of the lender's account: Financial Information, POCs, VARMs, Agents, SARs*, UWs, payment account information.
- ▶ Validation
 - For supervised lenders and non-supervised lenders without Auto Authority.
 - Requires full review of the lender's account: POCs, VARMs, Agents*, SARs*, Payment Account information.
- ▶ * May not be required for all lenders.

Renewal Notice

- Edit
- Request Supervised Authority
- Request State Level Authority
- Renew/Validation
- Reset PPM PIN
- Reinstate



MORTGAGE CORP

DBA Name	Lender ID	Company Status	Lender Authority	LAPP Indicator	Probation
	0750640000	Active	Non-Supervised with Auto Authority	Yes	No

- Home
- Company Information
- Points of Contact
- VA Relationship Managers
- SAR/UWs
- Lender's Sponsors
- More

Notes (0)

Announcements

Published On:

Your Annual Renewal is due on July 29, 2024, please complete by following the [Click Here](#)



► Select the 'Click Here' Link to open the Renewal application. (Icon 1)

Applications
Actionable Items - Returned to Submitter ▼

0 items • Sorted by Application ID • Refresh this list to view the latest data

Start Annual Renewal Request

1 The lender application **ID-00001257** has been saved. Please record the application ID number and continue this application process at the later time.

- ▶ Success message will appear (Icon 1), creating the application in the lender's Application tab (Icon 2).
- ▶ Application can also be linked by selecting the Application ID in the success message. (Icon 1)

Home Company Information Points of Contact VA Relationship Managers SAR/UWs **Application** More

Applications
All Application Statuses ▼

21 items • Sorted by Status • Filtered by All applications - Application Type • Updated a few seconds ago

	Applic... ▼	Name ▼	Contact Name ▼	Application Type ▼	St... ↓ ▼	Stat... ▼	Sub... ▼	Created ... ▼
1	ID-000012...	MORT...		Annual Renewal Request		6/7/2024	6/4/2024	brViolet varm
2	ID-000012...	MORT...		Agent Recognition	Approved	6/4/2024	5/30/20...	brViolet varm
3	ID-000012...	MORT...	Radegast TheBro...	UW	Approved	6/3/2024	5/29/20...	brViolet varm

Renewal: Start

Application ID-00001259

Application Type	Name	DBA Name	Lender ID	Status	Status Date
Annual Renewal Request		MORTGAGE CORP		Draft	6/3/2024

1 [Dropdown] Lender Information Review Points of ... Review Payments Review VARMS Review UWs Review SARs Review Agents Certifications & F... Upload Documents Ready to Submit

Lender Information
[Click here to complete Lender Information section](#) 2

Lender Information Certification & Fees Upload Documents

3 Lender Information

Company Name	MORTGAGE CORP	Phone	(555) 867-5309
Federal Tax ID	52	Phone Ext	
Fiscal Year End Date (Month/Day)	03/30	Mailing Address	46175 RVNCLAW BYWY
DBA Name		Mailing City	BALTIMORE
Email	luna@fake.com	Mailing State	MD
Company Website	www.fha203k.com	Mailing Zip Code	21236-0000

- ▶ Each step in the process will open in a new tab.
- ▶ Status bar will show completion of steps as you progress. (Icon 1)
- ▶ Select the 'Click here to complete...' link to open the current/next step. (Icon 2)
- ▶ Lender Information and other current information is summarized on this page. (Icon 3)

Renewal: Complete Lender Information Section

▼ Lender Information **1**

Name:

MORTGAGE CORP

Fiscal Year End Date (Month/Day):

03/30

Federal Tax ID:

52-

Corporate Structure:

Mortgage Broker

Other Corporate Description:

* Email

luna@fake.com

* Phone

5558675309

* Website

www.fha203k.com

DBA Name

* Mailing Address

46175 RVNCLAW BYWY

* Mailing City

BALTIMORE

* Mailing State

MD

* Mailing Zip Code

21236-0000

Specialized Loan Product & Services

Available

Construction Loan
Mobile Home
Reservation Loans
Supplemental Loans

Chosen

Title, Mortgage, Realty Company

► Confirm or update all data in the Lender Information section (Icon 1), then select 'Next' to continue (Icon 2).

2

Next

Renewal: Review Points of Contact Section

Navigation bar: Review Points of ... (highlighted), Review Payments, Review VARMs, Review UWs, Review SARs, Review Agents, Certifications & F..., Upload Documents, Ready to Submit

Points of Contact
Click here to complete Points of Contact section

1

Name: MORTGAGE CORP
DBA Name:
Lender ID: 0750640000
State Level Lender Authority:
Lender Authority: Non-Supervised with Auto Authority
LAPP Indicator: Yes
Company: Active
Probation: No

3

- Please choose an option
- Validate Points of Contact
 - Add Points of Contact
 - Edit Points of Contact

2

4

Active Points of Contacts
Showing 14 of 14 items • 14 items selected

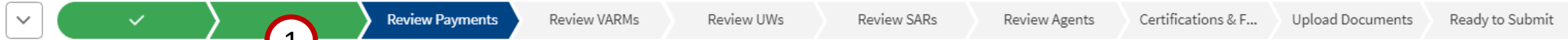
POC Type	First Name	Last Name	Direct Email
Assumptions/ROL Contact	Hugh	Mann	human@tree.person
SAR Contact	Hugh	Mann	human@tree.person
SAR Quality Review Contact	Hugh	Mann	human@tree.person
Assumptions/ROL Contact	Ent	TreePerson	ent@tree.person
File Request	Ent	TreePerson	ent@tree.person
Funding Fee & Payment Issues	Ent	TreePerson	ent@tree.person
Loan/Quality Review	Ent	TreePerson	ent@tree.person
Main Lender Contact	Ent	TreePerson	ent@tree.person
Management Liaison	Ent	TreePerson	ent@tree.person
Oversight Contact	Ent	TreePerson	ent@tree.person

- ▶ Select the link to 'Complete Points of Contact section.' (Icon 1)
- ▶ Select 'Add' or 'Edit POCs' (if needed) (Icon 2), then 'Validate Points of Contact.' (Icon 3)
- ▶ Select all POCs that are current and correct (Icon 4), then select 'Next' to continue. (Icon 5)

5

Next

Renewal: Payments Section



Payments
[Click here to complete Payments section](#)

Welcome to Veterans Home Loan Guaranty Program

OMB Approved Number 2900-0086
Respondent Burden 15 minutes

1 of 1 item • 0 items selected

Bank Name	Nickname	Routing Number	Account Number	Account Designation
PetrifiedForest Bank		041001039	XXXXXX5678	Lender Maintenance

*Is this payment account still valid?

- Yes
 No

2

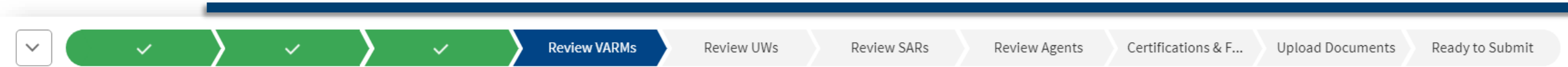
- ▶ Select the link to 'complete Payments section.' (Icon 1)
- ▶ Review the Payment Account information and answer the question 'Is this payment account still valid?' (Icon 2)
- ▶ If 'Yes,' select 'Submit' to continue. (Icon 3)
 - If 'No,' edit information or add new account if needed, and select 'Submit' once information is valid.

3

Submit

Save

Renewal: VARM



VA Relationship Managers (VARM) **1**
[Click here to complete VA Relationship Managers section](#)

Welcome to Veterans Home Loan Guaranty Program

OMB Approved Number 2900-0086
Respondent Burden 15 minutes

* Please choose an option **2**
 Edit VARM
 Validate VARM

Save

Next

* Please choose an option **3**
 Edit VARM
 Validate VARM

1 of 1 item • 0 items selected

Name	Direct Email	Phone
brVincent varm	training.test@test.tst	123-123-1234

Save

4 Next

- ▶ Select the link to 'complete the VA Relationship Manager section.' (Icon 1)
- ▶ Select options to 'Edit' or 'Validate VARM.' (Icon 2 and 3)
- ▶ 'Edit' will open a new dialogue to edit VARM contact info.
- ▶ Select 'Validate VARM,' and all valid VARMS, and then 'Next' to continue. (Icon 4)

Renewal: UW Section



Underwriters

[Click here to complete Underwriter section](#)



*Please Select an Option

- Would you like to Validate Underwriter?
- Would you like to edit an Underwriter?



Select the checkbox next to each active VA Credit Underwriter or Apprentice VA Credit Underwriter who is still employed and working in that capacity.

Select the all Valid UWs

Showing 2 of 2 items • 2 items selected

<input checked="" type="checkbox"/>	Contact Name	Direct Email	Phone
<input checked="" type="checkbox"/>	Radegast TheBrown	tradegast@the.brown	(789) 894 - 6123#
<input checked="" type="checkbox"/>	Gandalf Wizard	gandalf@the.grey	(789) 894 - 6123#

- ▶ Select the link to 'complete Underwriter section.' (Icon 1)
- ▶ Select options to 'Edit' or 'Validate Underwriters.' (Icon 2)
- ▶ 'Edit' will open a new dialogue to edit UW status.
- ▶ Select all valid UWs and then 'Next' to continue. (Icon 3)



Next

Renewal: SAR Section



SARs
[Click here to complete SAR section](#) **1**

* Please choose an option

- Edit SAR
 Validate SAR **2**

Select the all Valid SARs

Showing 1 of 1 item • 1 item selected

<input type="checkbox"/> Contact Name	<input type="checkbox"/> Direct Email	<input type="checkbox"/> Phone
<input checked="" type="checkbox"/> The Stryder		

Search this list...

Previous **3** Next

- ▶ Select the link to 'complete SAR section.' (Icon 1)
- ▶ Select options to 'Edit' or 'Validate SAR.' (Icon 2)
- ▶ 'Edit' will open a new dialogue to edit SAR status.
- ▶ Select 'Validate SAR' (Icon 2), select all valid SARs, and then 'Next' to continue. (Icon 3)

Renewal: Agents Section



Agents
[Click here to complete Agents section](#)

1

2 Select the agents who you wish to maintain a VA relationship with
Agents 1/1

Active Agents			Search this list...
Agent Company Name	Renewal Due Date	Relationship	
<input checked="" type="checkbox"/> FINANCIAL	Jul 29, 2024	Relationship	

Upload Documents
 Or drop files

Save

- ▶ Select the link to 'complete Agents section.' (Icon 1)
- ▶ Select the Agents from the list with whom you wish to maintain a VA relationship. (Icon 2)
- ▶ Documents can be uploaded along with this step (Icon 3) but it is not required.
- ▶ Select 'Next' to continue. (Icon 4)

4
Next

Renewal: Certifications & Fees Section



Certifications & Fees

[Click here to complete Certifications & Fees section](#)



▶ Select link to 'complete Certifications & Fees section.' (Icon 1)

▶ Review and accept all Certifications. (Icon 2) (Image for illustration only.)

▶ Select 'Next' to continue. (Icon 3)

▼ [Certifications and Fees](#)



- THE LENDER-APPLICANT WILL COMPLY WITH THE PROVISIONS OF TITLE 38 U.S.C., VA REGULATIONS, AND OTHER DIRECTIVES ISSUED BY VA.
- IF SUBSEQUENTLY THE LENDER-APPLICANT FAILS TO MEET ANY REQUIREMENT OF 38 CFR 36.4352, IT WILL IMMEDIATELY REPORT TO VA THE CIRCUMSTANCES AND THE REMEDIAL ACTION PLAN TO CURE IT.
- THE LENDER-APPLICANT WILL NOTIFY VA OF ANY CHANGE IN ITS CORPORATE STRUCTURE, OPERATIONS, OR FINANCIAL CONDITION WHICH MAY HAVE A BEARING ON ITS CONTINUED QUALIFICATIONS FOR AUTHORITY TO CLOSE LOANS AUTOMATICALLY.
- THE LENDER-APPLICANT WILL NOTIFY VA UPON A MERGER OR ACQUISITION OF THE APPROVED LENDER-APPLICANT.
- THE LENDER-APPLICANT WILL NOTIFY VA OF ANY CHANGES OF EMPLOYMENT AS TO THE PRINCIPAL OFFICER, DIRECTORS, UNDERWRITER, AND STAFF APPRAISER REVIEWERS (SAR).
- I CERTIFY I AM A CORPORATE OFFICER AND/OR PRINCIPAL OWNER OF THE ABOVE-NAMED LENDER-APPLICANT WITH THE AUTHORITY TO LEGALLY BIND THE LENDER-APPLICANT TO EXECUTE THESE CERTIFICATIONS AND ACKNOWLEDGMENTS ON BEHALF OF THE APPLICANT.
- THE LENDER-APPLICANT'S PRIMARY ACTIVITY WILL BE THE ORIGINATION, PURCHASING, AND SERVICING OF REAL ESTATE MORTGAGES.
- THE LENDER-APPLICANT WILL SUBMIT, AT ANY TIME, TO SUCH EXAMINATION OF ITS RECORDS AND ACCOUNTS AS THE SECRETARY OF VETERANS AFFAIRS MAY REQUIRE.
- THE LENDER-APPLICANT WILL PROMPTLY FURNISH VA ANY REQUESTED INFORMATION AND DOCUMENTATION.
- THE LENDER-APPLICANT WILL FURNISH UPON REQUEST OF VA, A COPY OF ITS MONTHLY DELINQUENCY REPORTS PERTAINING TO VA GUARANTEED LOANS BEING SERVICED.
- THE LENDER-APPLICANT WILL NOT CLOSE LOANS ON AN AUTOMATIC BASIS AS A COURTESY OR ACCOMMODATION FOR OTHER MORTGAGE LENDERS REGARDLESS OF WHETHER OR NOT SUCH LENDERS ARE APPROVED THEMSELVES TO CLOSE ON AN AUTOMATIC BASIS, NOR WILL IT CLOSE LOANS ON THE AUTOMATIC BASIS FOR ANY BUILDER, REAL ESTATE BROKERAGE FIRM OR OTHER ENTITY WHICH IT OWNS, IS AFFILIATED WITH OR HAS A FINANCIAL INTEREST IN, WITHOUT THE EXPRESS WRITTEN APPROVAL FROM VA.
- THE LENDER-APPLICANT WILL NOT PROCESS LOANS IT DOES NOT ITSELF INTEND TO MAKE.
- THE LENDER-APPLICANT WILL TAKE RESPONSIBILITY FOR ALL CREDIT INFORMATION, I.E., CREDIT REPORT, VERIFICATIONS OF EMPLOYMENT AND DEPOSITS, AND DISCLOSE THE SOURCES OF SUCH INFORMATION.
- THE LENDER-APPLICANT WILL NOT USE ANY PUBLICITY, ADVERTISING PLAQUES, OR OTHER DEVICES WHICH IMPLY A SPECIAL RELATIONSHIP WITH THE DEPARTMENT OF VETERANS AFFAIRS.
- I HEREBY CERTIFY THAT ALL OF THE INFORMATION I HAVE PROVIDED ON THIS FORM AND ANY ACCOMPANYING DOCUMENTATION IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I ACKNOWLEDGE THAT IF I KNOWINGLY HAVE MADE ANY FALSE, FICTITIOUS, OR FRAUDULENT STATEMENT, REPRESENTATION, OR CERTIFICATION ON THIS FORM ON ANY ACCOMPANYING DOCUMENTS, I AS WELL AS THE APPLICANT MAY BE SUBJECT TO ADMINISTRATIVE ACTIONS, AS WELL AS CIVIL AND CRIMINAL PENALTIES, INCLUDING FINES AND/OR IMPRISONMENT, UNDER APPLICABLE FEDER LAW, INCLUDING BUT NOT LIMITED TO 18 U.S.C. 1001, 1010, 1010, AND 1012, AND 31 U.S.C. 3729 AND 3802.
- THE FORM IS BEING SUBMITTED ON BEHALF AND WITH AUTHORIZATION OF THE PRESIDENT OR PRINCIPAL OFFICER.



Next

Renewal: Fee Payment Information



Certifications & Fees

Payment Information

1

Payment Amount: \$200.00

Renewal Fee: \$200.00

Count of Agents: 0

Total Agent Amount: \$0.00

Nickname:

Account Number: 2345

2

Previous

Submit

- ▶ Review the 'Payment Amount' and 'Payment Account' information. (Icon 1)
- ▶ Select 'Submit' (Icon 2) to submit the payment for the Annual Renewal.

Renewal: Upload Documents (Financials)



Upload Documents
Click here to complete Upload Files section **1**

Account Details

Name: MORTGAGE CORP	DBA Name:	Lender ID: 07	Company Status: Active
Lender Authority: Non-Supervised with Auto Authority	State Level Lender Authority:	LAPP Indicator: Yes	Probation: No

Please use one of the approved formats:

.pdf

* Document Category **2**
PPM

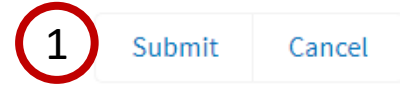
* Document Type **3**
Other-PPM

* Upload Files **4**
[Upload Files](#) Or drop files

- ▶ Select link to 'complete Upload Files section.' (Icon 1)
- ▶ Use the document upload feature to select the 'Document Category' (Icon 2) and 'Document Type' (Icon 3).
- ▶ Use the 'Upload Files' option (Icon 4) to upload financial statements
- ▶ Select 'Next' to continue. (Icon 5)

5
Next

Renewal: Ready to Submit



Submit Authority Application

Payment Information

Payment Amount: \$200

Nickname:

Renewal Fee:

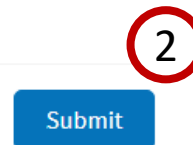
200.00

Account Number: 5678

Count of Agents: 0

Total Agent Amount: \$0.00

- ▶ Select the 'Submit' button to submit the Annual Renewal Application to LGY for review. (Icon 1)
- ▶ Review the information and select 'Submit' on the pop-up window. (Icon 2)



Renewal: Completed

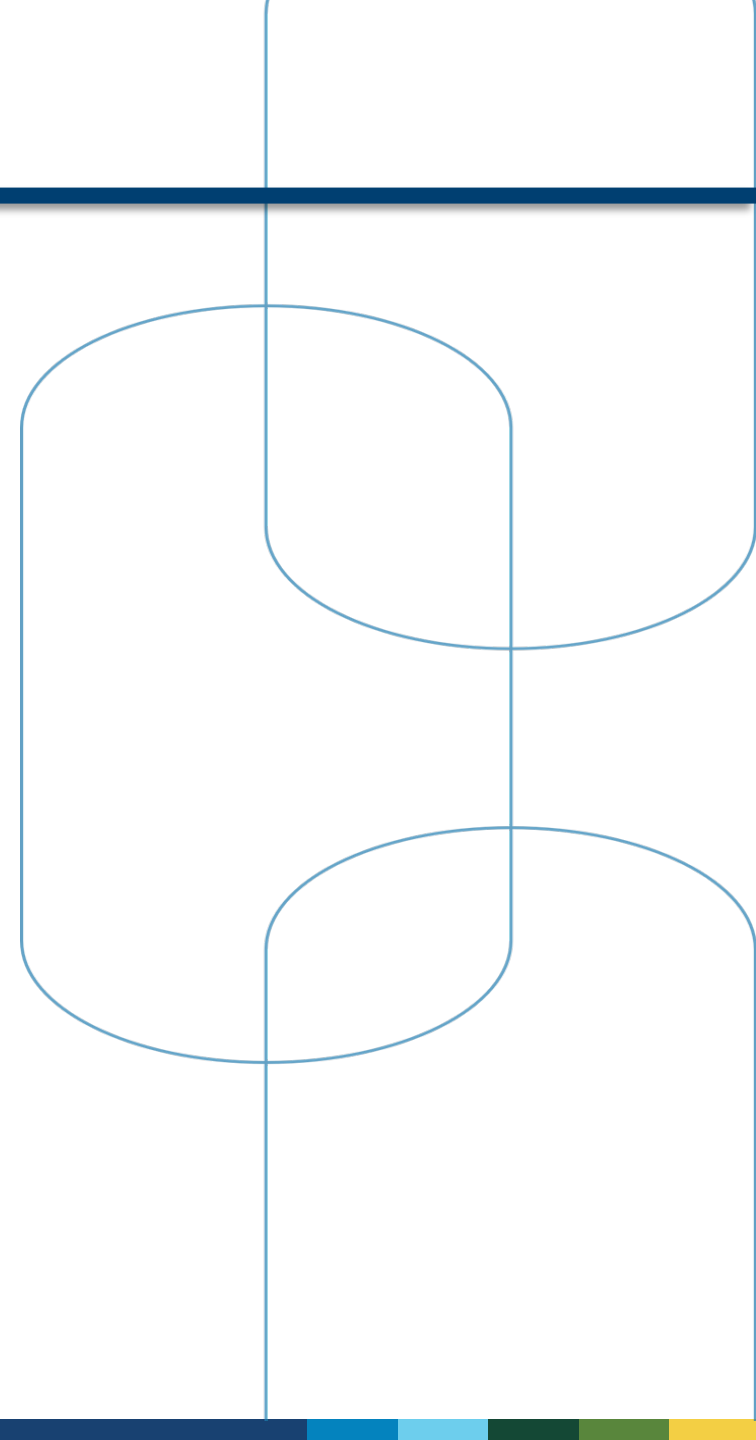
Submit Authority Application

1 The application ID-00001261 has been submitted. Please record the application ID number.

- ▶ When the Application is submitted, a success message will appear. (Icon 1)
- ▶ The Application has now been sent to LGY for review and for payment.
- ▶ It will appear in the lender's application statuses list on the Home Page.
- ▶ If any information is missing or if the LGY reviewer has questions, it will appear on the 'Returned to Submitter' list.

Demo

- ▶ Renewal Process



Summary

► Objectives:

- Navigate the PPM Portal with more familiarity
- Submit applications for Agents and UWs
- Complete the Renewal or Validation Process
- Understand how applications and processes will be completed in the PPM Portal.

► Topics:

- Overview of Applications
- Add Agent Application
- Add UW Application – Returned to Submitter Process
- Renewal Application (for lenders with Auto Authority)

What's Next?

- ▶ User Guide

- Will include step-by-step instructions and screenshots.

Contact Us

LGY Policy, Program, or Technology Questions

[ServiceNow Portal](#)

Phone help: (877) 827-3702

Loan Guaranty Service:
A Key To Homeownership For Those Who Served

VA



U.S. Department
of Veterans Affairs