

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

Program Participant Management (PPM) Basics

September 2024

VA



U.S. Department
of Veterans Affairs

Objectives

- ▶ Understand the basics of how the Program Participant Management (PPM) Portal works.
- ▶ Understand how the portal is organized.
- ▶ Learn where to go for help or more information.



Agenda

- ▶ Logging In
- ▶ PPM Home Screen Basics
- ▶ Lender Profile: Accounts, Payments, and Other Screens
- ▶ More Information

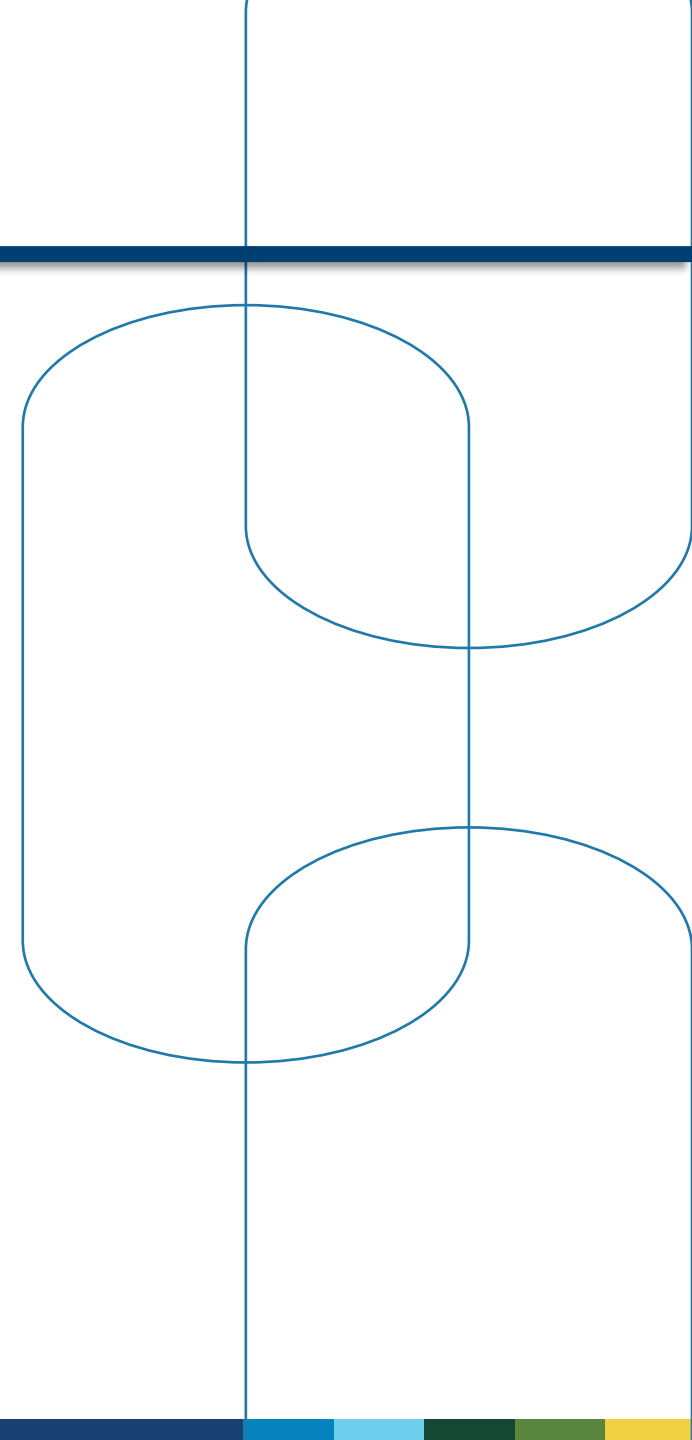


PPM Overview

- ▶ 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 Underwriter (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 an 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: Select PPM.
- ▶ Sign-on through ID.me interface.

Program Participant Management Portal
The Program Participant Management Portal (PPM) is now available. Lenders should designate a VA Relationship Manager and [register](#) today!

Welcome to VA Loan Guaranty Services [Contact VA for Policy or Technical Inquiry](#)

LGY Hub
Access VA Loan Guaranty applications, such as WeBLGY.
[Sign In or Register for New Account](#)

PPM
Program Participant Management Portal used by lender VA Relationship Managers (VARMs) to submit lender application requests, process renewals, and update lender profile information.
[Sign In or Register for New Account](#)

FFPS
Funding Fee Payment System used to process funding fee payments and refunds on guaranteed loans.
[Sign In or Register for New Account](#)

VA Loan Guaranty Services

- More secure**
Two factor authentication reduces the risk of account and data theft.
- Easier to use**
Intuitive and responsive design helps you find and do more, faster.
- Get the help you need**
Easy to read documentation—and a new, streamlined way to contact our help desk with any problems you encounter.
- Our servers love your servers**
Our growing REST API allows you to see and make changes automatically.

Public Tools
Guaranty Calculator
Builder Search
Condo Report

Helpful Links
Lenders Handbook
CAIVRS
Military Pay and Housing Allowance Charts
Fee appraiser updates
Circulars: Calendar Years 2021 to Present - VA Home Loans

Get Help
Frequently Asked Questions
Privacy
Veterans Crisis Line

VA U.S. Department of Veterans Affairs

VARM Registration Landing Page

- ▶ Landing page for Lenders who are not actively enrolled in the PPM Portal.
- ▶ When PPM is first released, Lenders must appoint an individual who will act as a VARM.
- ▶ The appointed individual will start at the page displayed to begin the VARM registration process.
 - Select 'Request New VA Relationship Manager (VARM) Account.'

*A PIN is required for registration.

VA U.S. Department of Veterans Affairs Home Applications Search... [User Profile Icon]

Welcome to VA Program Participant Management Portal

The Program Participant Management Portal (PPM) is used by the lender VA Relationship Managers (VARMs) to submit lender application requests, process renewals, and update lender profile information.

- Submit New Lender Application**
To request to become a VA lender, including non-supervised lenders who are not requesting automatic authority (e.g., brokers/agents/prior approval lenders).
- Access in Process Lender Application**
To check the status of a previously submitted application or to continue a draft application.
- Request New VA Relationship Manager (VARM) Account**
The VARM is an administrator who may update the lender's profile, complete the annual renewals/validations and submit applications for credit underwriters, SARs, automatic authority, etc.
- Reinstate Existing VA Relationship Manager (VARM) Account**
Reinstate a VARM's relationship with the lender after it was deactivated.

Announcements

Please note that all lenders are now required to validate their profile annually, in addition, to report a merger or acquisition contact VA through the [ServiceNow portal](#).

Public Tools
Guaranty Calculator
Builder Search
Condo Report

Helpful Links
Lenders Handbook
CAVRS
Military Pay and Housing Allowance Charts

Get Help
Frequently Asked Questions
Help
Lender's Resources

VA U.S. Department of Veterans Affairs

Note: To ensure continued access it is recommended that Lenders establish a minimum of two VARMs.

PPM PIN

- ▶ A Personal Identification Number (PIN) is required for each Lender to access the portal.
 - Initial PIN will be provided.
 - The PIN will reset every 90 days.
- ▶ Initial PIN
 - PINs will be emailed to existing Main Lender Contact and Management Liaison POCs on the day of PPM launch.
 - PINs are an 8-digit alphanumeric ID.
 - These PINs are different from the LGY PIN.
- ▶ Accessing PIN Within the Portal
 - Lenders can view PIN from the Company Information tab. (Icon 1)
 - Notification to Lender Home Page when PIN resets every 90 days.

The screenshot displays the 'Company Information' tab in the PPM portal. The page is divided into two columns of information. The left column contains fields for Name (MORTGAGE CORP), DBA Name, Federal Tax ID, Lender ID, Fiscal Year End Date (03/30), Lender Authority (Non-Supervised with Auto Authority), Auto Approval Begin Date (5/3/1995), Auto Approval End Date, State Level Lender Authority, State Level Authority Begin Date, State Level Authority End Date, Corporate Structure (Mortgage Broker), Other Corporate Description, and LAPP Indicator (Yes). The right column contains fields for Company Status (Active), Phone, Email (luna@fake.com), Website (www.fha203k.com), Mailing Address (46175 RVNCLAW BYWY, BALTIMORE, MD 21236-0000, United States), Financial Statement Received (11/30/2021), NMLS Number, Unique Entity Identifier (UEI), Renewal/Validation Due Date (7/28/2025), Renewal/Validation Complete (6/7/2024), Reinstatement Expiration Date (7/4/2024), Lender LOS Software, Vendorization Code (521720545), and PPM PIN (tH1V4hqY). A red circle with the number '1' is drawn around the PPM PIN field.

Home	Company Information	Points of Contact	VA Relationship Managers	SAR/UWs	Applica
Name	MORTGAGE CORP		Company Status	Active	
DBA Name			Phone		
Federal Tax ID			Email	luna@fake.com	
Lender ID			Website	www.fha203k.com	
Fiscal Year End Date (Month/Day)	03/30		Mailing Address	46175 RVNCLAW BYWY BALTIMORE, MD 21236-0000 United States	
Lender Authority	Non-Supervised with Auto Authority		Financial Statement Received	11/30/2021	
Auto Approval Begin Date	5/3/1995		NMLS Number		
Auto Approval End Date			Unique Entity Identifier (UEI)		
State Level Lender Authority			Renewal/Validation Due Date	7/28/2025	
State Level Authority Begin Date			Renewal/Validation Complete	6/7/2024	
State Level Authority End Date			Reinstatement Expiration Date	7/4/2024	
Corporate Structure	Mortgage Broker		Lender LOS Software		
Other Corporate Description			Vendorization Code	521720545	
LAPP Indicator	Yes		PPM PIN	tH1V4hqY	1

VARM Registration Form – PIN Input

- ▶ Enter Lender ID and PPM PIN. (Icon 1)
- ▶ Then select 'Next.' (Icon 2)

[Welcome to Veterans Home Loan Guaranty Program!](#)

▼ Request New VA Relationship Manager (VARM) Account

* Lender ID

1

* PIN

2

Next

VARM Contact Information

- ▶ Enter contact information for the VARM.
 - First name, last name, and Social Security Number will be pulled from the established ID.me account and cannot be adjusted.
 - Users must provide a business phone number and email address.
 - Phone format is numbers only, i.e. 1234567890.

First Name CSATest	* Phone <input type="text"/> <small>Complete this field.</small>
Middle Name	Phone Ext <input type="text"/>
Last Name Last Name	* Direct Email <input type="text" value="csatest.lastname@monument.com"/>
Suffix	
SSN 555-66-7777	

[Previous](#) [Next](#)

Submitted VARM Application

- ▶ Success message and application link will display. (Icon 1)
- ▶ VARM can view the application, which will be reviewed by a VA Loan Specialist for approval.
 - Once a VARM is established, all additional VARM applications will go to the established VARM for approval.
 - If there is no currently active approved VARM, VA must review the application.

1

The VARM application ID ID-00001867 has been submitted. Please record the application ID number and continue this application process at the later time.

Finish

Ensuring Continued Access

- ▶ You **must** log in at least once every forty-five (45) days to ensure continued access to PPM.
 - Failure to do so will require reactivation of your account.
- ▶ Validate VA Relationship Manager
 - VA requires validation of all active VARMs every 90 days.
 - To complete this process, select the 'Validate VARM' button on the VA Relationship Managers tab. (Icon 1)
 - Lenders will be prompted by the system to complete validation when required.
 - As a reminder, Lenders are limited to a maximum of 5 VARMs.

The screenshot displays the 'VA Relationship Managers' tab in a web application. The navigation bar includes 'Home', 'Company Information', 'Points of Contact', 'VA Relationship Managers' (underlined), 'SAR/UWs', 'Application', and 'More'. Below the navigation bar, there are two main sections: 'Active VA Relationship Managers (0)' and 'Inactive VA Relationship Managers (0)'. Each section has an 'Update Relationship' button. In the 'Active' section, a dropdown menu is open, and the 'Validate VARM' option is highlighted with a red circle containing the number '1'. A red icon of a document with a checkmark is visible in the top right corner of the interface.

Landing Page for Registered Users

- ▶ The PPM Landing Page is the first page users will see upon logging in to the PPM Portal.
- ▶ Users can only be associated with one Lender at a time and will only see the profile link for that specific Lender.
- ▶ Select the Lender name (Icon 1) to be directed to the Lender Profile Page.

The screenshot shows the VA Loan Guaranty Service landing page. At the top, there is a navigation bar with the VA logo, "U.S. Department of Veterans Affairs", and "Home". A search bar is on the right. Below the navigation bar, the page says "Welcome to VA Loan Guaranty Service". There is a section for "Accounts" with a dropdown menu set to "All Lender Accounts". Below this, there is a table of lender accounts. The table has columns for Name, DBA Name, Lender ID, Company Status, Lender Authority, and LAPP Indicator. The first row of the table is circled in red and has a "1" in a red circle next to it. The first row contains the following data: "1", "..... MORTGAGE, LLC", "dba name test", "09L.....", "Active", "Non-Supervised with Auto Authority", and "Yes".

Name ↑	DBA Name	Lender ID	Company Status	Lender Authority	LAPP Indicator
1 MORTGAGE, LLC	dba name test	09L.....	Active	Non-Supervised with Auto Authority	Yes

Lender Profile Home Page

- ▶ Lender Profile Header (Icon 1)
- ▶ Lender Profile Tabs (Icon 2)
- ▶ Announcements (Icon 3)
- ▶ Renewal and Validation Notifications (Icon 4)
- ▶ Actionable Items: Returned to Submitter (Icon 5)
- ▶ Actionable Items: VARM Review (Icon 6)
- ▶ Application Statuses (Icon 7)
- ▶ Action Buttons (Icon 8)

8 Edit Request Supervised Authority Request State Level Authority Renew/Validation

1 Account MORTGAGE, LLC

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

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

3 Announcements

Published On:

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

5 Applications Actionable Items - Returned to Submitter

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

Search this list...

6 Applications Actionable Items - VARM Review

0 items • Sorted by Application ID • Filtered by All applications - Status, Application Type, Status Reason • Updated 2 hours ago

Application ID ↑ Application Type Status

7 Applications Application Statuses

2 items • Sorted by Application ID • Filtered by All applications - Status, Application Type, Number of Days • Updated 2 hours ago

	Application ID ↑	Application Type	Name	Status	Status Reason	Status Date
1	ID-00001065	UW	MORTGAGE CORP	Pending	Second Level Review	
2	ID-00001159	VARM	MORTGAGE CORP	Approved	RLC Approval	5/22/2024

Announcements and Actionable Items

▶ Announcements (Icon 1):

- Used to display communications from VA.

▶ Actionable Items: Returned to Submitter (Icon 2):

- Items that require action by the VARM, such as:
 - Additional information requested to complete an application review.
 - Payment failures.

▶ Actionable Items: VARM Review (Icon 3):

- Established VARMS use this to review and decision applications for new VARMS.

1

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

Announcements

test 7

testing 6 announcements to all userstesting 6 announcements to all userstesting 6 announcements to all users

Published On: May 31, 2024

No Renewal or Validation Lender Accounts are past 120 days.

Applications
Actionable Items - Returned to Submitter ▼

1 item • Sorted by Application ID • Refresh this list to view the latest data

Search this list...

Draft (0) Pending (0) Cancelled (0) Expired (0) Returned to Sub... (1)

2

Applications
Actionable Items - Returned to Submitter ▼

1 item • Sorted by Application ID • Refresh this list to view the latest data

Search this list...

Draft (0) Pending (0) Cancelled (0) Expired (0) Returned to Sub... (1)

ID-0000451	UW	Returned to Submitter	5/29/2024
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3

Applications
Actionable Items - VARM Review ▼

0 items • Sorted by Application ID • Filtered by All applications - Status, Application Type, Status Reason • Updated a minute ago

Search this list...

Application ID ↑	Application Type	Status
------------------	------------------	--------

Application Statuses List

- ▶ This Application Statuses List (Icon 1) displays applications submitted by a Lender.
 - Drafts, Pending, Returned to Submitter, and recently Approved or Denied.
- ▶ List Column Headings (Icon 2) can be used to sort each column by the indicated value.
- ▶ The Application ID Number (Icon 3) acts as a hyperlink, used to open the record related to the application number.
- ▶ The Status column (Icon 4) displays the application's current status. The available statuses are Draft, Pending, Returned to Submitter, Approved, or Denied.
 - Applications in an Approved or Denied status will only display for fifteen (15) calendar days from the decision date.

The screenshot shows a web interface for 'Applications' with a sub-section 'Application Statuses'. It features a search bar, a table with columns for Application ID, Application Type, Name, Status, and Status Date, and a refresh button. Red circles with numbers 1-4 highlight the 'Application Statuses' header, the column headers, the Application ID link, and the Status column respectively.

	Application ... ↑ ▾	Application Type ▾	Name ▾	Status ▾	Status Date ▾	
1	ID-00000446	Agent Recognition	FEDERAL CREDIT UNION	Pending	5/5/2024	
2	ID-00000447	Agent Recognition	FUNDING LLC	Pending	5/5/2024	
3	ID-00000448	Agent Recognition	BANK	Pending	5/5/2024	

Company Information Tab

- ▶ The Company Information tab holds the Lender's basic information.
- ▶ The Lender's name is listed at the top of the page. (Icon 1)
- ▶ This information includes authority, mailing address, and other similar information. (Icon 2)
- ▶ Some Lender Profile information can be edited by selecting either the 'Edit' icon (within the Lender information detail) or by selecting the general 'Edit' button. (Icon 3)

The screenshot shows the VA Lender Profile page for 'MORTGAGE CORP'. The page is divided into several sections. At the top, there is a navigation bar with the VA logo, 'U.S. Department of Veterans Affairs', and 'Home'. A search bar and notification icons are on the right. Below the navigation bar, there is a summary section with a grid of key information: DBA Name (MORTGAGE CORP), Lender ID, Company Status (Active), Lender Authority (Non-Supervised with Auto Authority), LAPP Indicator (Yes), and Probation (No). Below this is a horizontal menu with tabs: Home, Company Information (selected), Points of Contact, VA Relationship Managers, SAR/UWs, Lender's Sponsors, Lender's Agents, Payment Information, and Documents. The main content area is split into two columns. The left column contains fields for Name (MORTGAGE CORP), DBA Name, Federal Tax ID, Lender ID, Fiscal Year End Date (08/31), Lender Authority (Non-Supervised with Auto Authority), Auto Approval Begin Date (5/3/1995), Auto Approval End Date, State Level Lender Authority, State Level Authority Begin Date, and State Level Authority End Date. The right column contains fields for Parent Account, Company Status (Active), Phone ((555) 867-5309), Email (luna@fake.com), Website (www.fha203k.com), Mailing Address (46175 RVNCLAW BYWY, BALTIMORE, MD 21236-0000, United States), Financial Statement Received (11/30/2021), NMLS Number, Unique Entity Identifier (UEI), Renewal/Validation Due Date (12/29/2023), and Renewal/Validation Complete. Callouts are placed on the page: Icon 1 points to the 'Account' icon and 'MORTGAGE CORP' name; Icon 2 points to the 'DBA Name' field; Icon 3 points to the 'Edit' icon on the right side of the 'Name' field; and Icon 4 points to the 'Edit' button in the top navigation bar.

VA U.S. Department of Veterans Affairs Home

Search...

1 Account MORTGAGE CORP

4 Edit Request Supervised Authority Request State Level Authority Renew/Validation

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

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

3

Name MORTGAGE CORP 2

Parent Account

DBA Name

Company Status Active

Federal Tax ID

Phone (555) 867-5309

Lender ID

Email luna@fake.com

Fiscal Year End Date (Month/Day) 08/31

Website www.fha203k.com

Lender Authority Non-Supervised with Auto Authority

Mailing Address 46175 RVNCLAW BYWY BALTIMORE, MD 21236-0000 United States

Auto Approval Begin Date 5/3/1995

Financial Statement Received 11/30/2021

Auto Approval End Date

NMLS Number

State Level Lender Authority

Unique Entity Identifier (UEI)

State Level Authority Begin Date

Renewal/Validation Due Date 12/29/2023

State Level Authority End Date

Renewal/Validation Complete

Global Search Bar

- ▶ The Global Search Bar (Icon 1) allows you to look up records, files, and other items within your PPM Profile.
- ▶ Search for Agents, SARs, Underwriters, or Banks by entering related keywords.
- ▶ The Global Search Bar can be found at the top of any PPM page.
- ▶ Search results are organized by category. (Icons 2 and 3)
- ▶ Results can be narrowed with the Search Results Panel. (Icon 4)

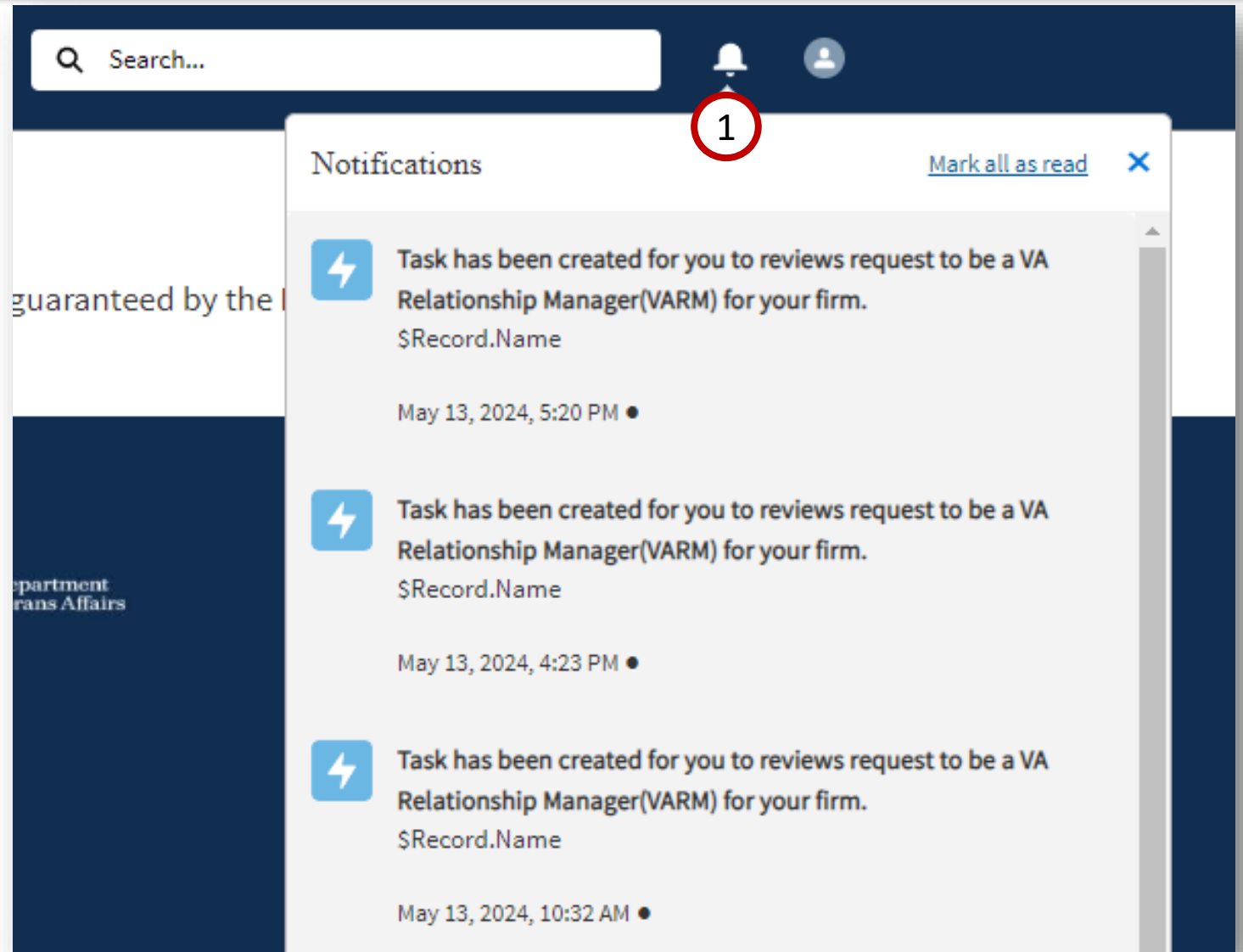
The screenshot displays the VA PPM Global Search interface. At the top, the VA logo and 'U.S. Department of Veterans Affairs' are visible. A search bar at the top right contains the text 'va' and is marked with a red circle containing the number 1. Below the search bar, the results are organized into categories. The 'Contacts' category is selected and marked with a red circle containing the number 2. It shows 5+ results sorted by Relevance. The results are displayed in a table with columns: CONTACT NAME, NAME, PHONE, PHONE EXT, DIRECT EMAIL, VARM, SAR, UW, SAR/UW ID, and UW APPRENTICE INDICATOR. The 'Applications' category is also visible, marked with a red circle containing the number 3, showing 5 results sorted by Relevance. The results are displayed in a table with columns: APPLICATION ID, NAME, CONTACT NAME, APPLICATION TYPE, STATUS, STATUS REASON, STATUS DATE, and SUBMITTED DATE. The 'Search Results' panel on the left is marked with a red circle containing the number 4, showing a list of categories: All, Accounts, Contacts, Applications, Relationship Record, Payment Accounts, and Files. A 'Collapse List' link is also present.

CONTACT NAME	NAME	PHONE	PHONE EXT	DIRECT EMAIL	VARM	SAR	UW	SAR/UW ID	UW APPRENTICE INDICATOR
Davi	Bank	(910) 901-5817	123	ia@va.gov	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0000001	No
Vinc	Bank	1940591756	841	ia@va.gov	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		No
Vincent	Bank	1940591756	841	ia@va.gov	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		No
Chin	Bank			13@va.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
Vin	Bank	1940591756	841	ia@va.gov	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0000013	No

APPLICATION ID	NAME	CONTACT NAME	APPLICATION TYPE	STATUS	STATUS REASON	STATUS DATE	SUBMITTED DATE
ID-00000183	Bank		SAR	Pending	Preliminary Approval	5/21/2024	5/21/2024
ID-00000011	Bank		SAR	Returned to Submitter	Payment Failed	5/3/2024	4/4/2024
ID-00000047	Bank		Agent Recognition	Expired	No Lender Action Taken	5/15/2024	
ID-00000443	Bank		Auto Authority Request	Draft		5/29/2024	
ID-00000001	Bank		VARM	Approved	RLC Approval	5/15/2024	4/3/2024

Notifications Icon/Bell

- ▶ Used to alert the VARM to any messaging or actionable items.
- ▶ Selecting the Notifications Bell (Icon 1) will open a window to display any current messages or alerts sent to your account by the portal. This can include specific task reminders or messages generated by the portal.
- ▶ Users can select notifications that require action and will be directed to the location of that item.



The screenshot shows a web portal interface. At the top, there is a search bar with the text "Search...". To the right of the search bar are two icons: a bell icon (notifications) and a user profile icon. The bell icon is circled in red with the number "1" inside. Below the bell icon, a notifications dropdown menu is open. The menu has a title "Notifications" and a link "Mark all as read" with a close button "X". The menu contains three notifications, each with a lightning bolt icon and the text "Task has been created for you to reviews request to be a VA Relationship Manager(VARM) for your firm." followed by "\$Record.Name". The timestamps for the notifications are "May 13, 2024, 5:20 PM", "May 13, 2024, 4:23 PM", and "May 13, 2024, 10:32 AM".

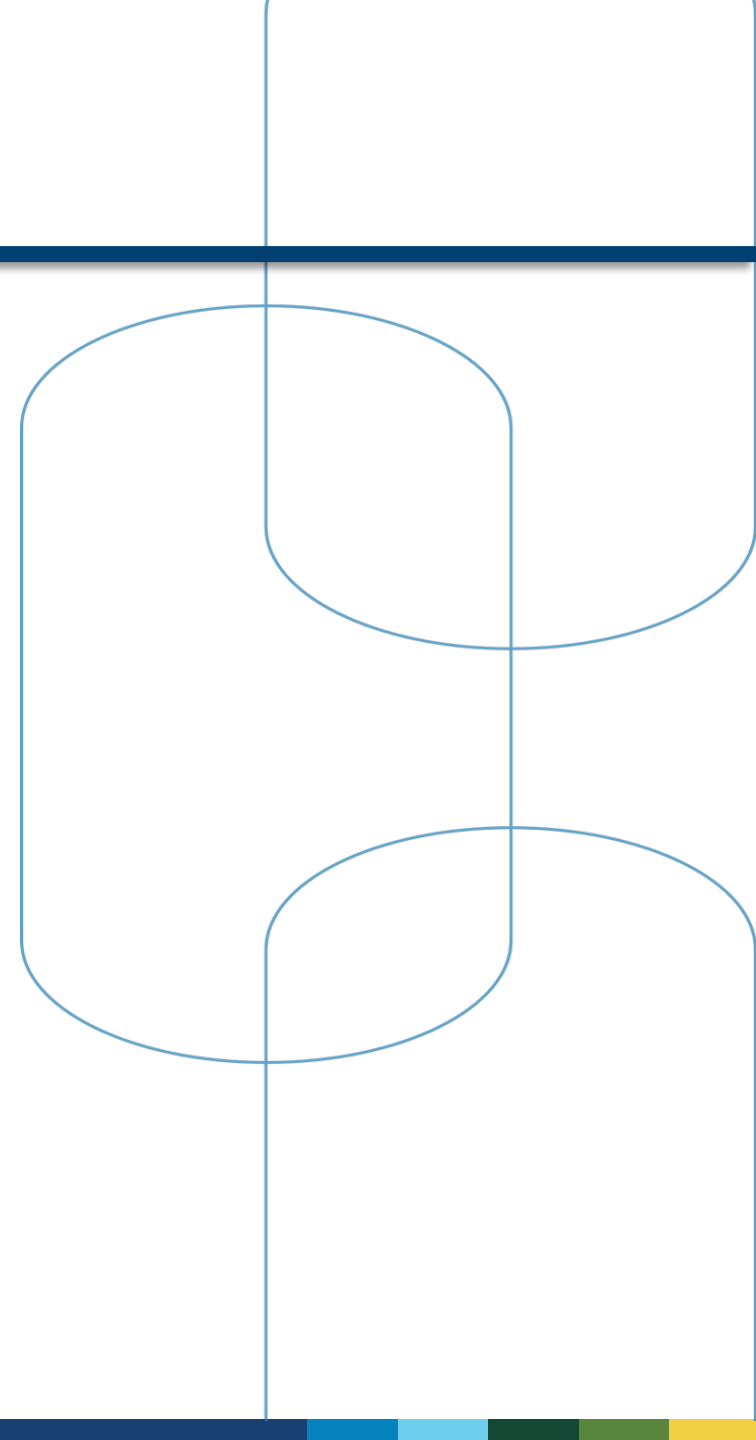
User Icon

- ▶ Selecting the 'User Icon' (Icon 1) will open a menu that allows you to log out of the PPM Portal.



Demo

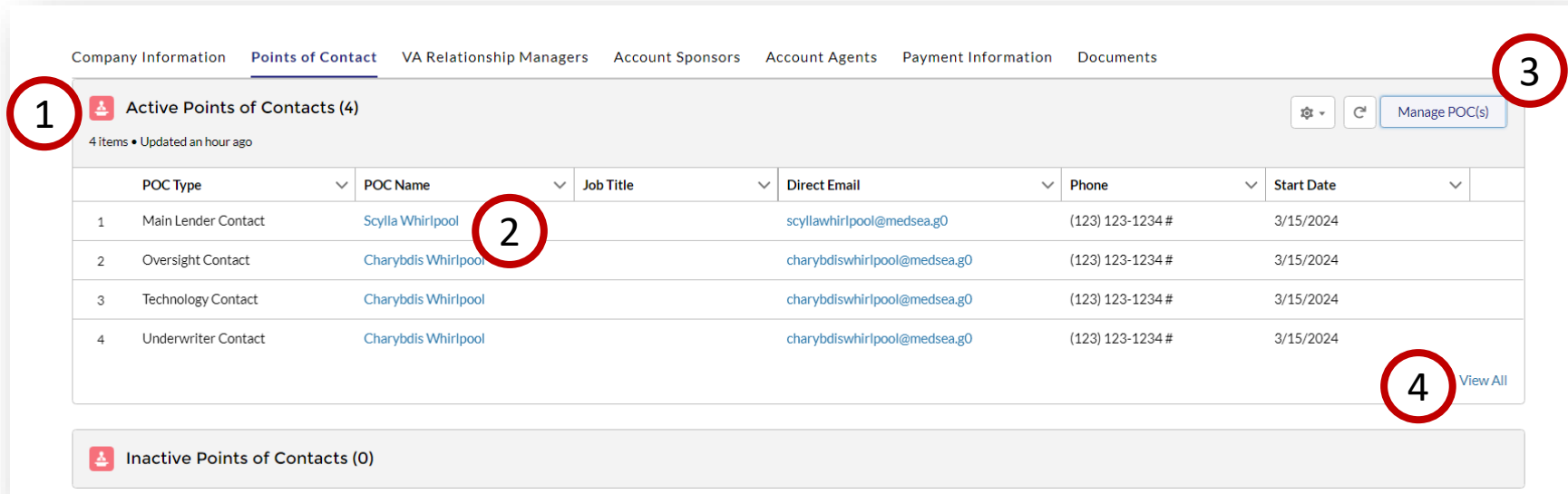
- ▶ VARM Registration
- ▶ Home Screen
 - Notifications
 - Actionable Items: VARM Review
 - Actionable Items
 - Application Statuses



Lender Profile Tabs – Points of Contact Tab

► The Points of Contact tab shows:

- Active (and Inactive) Points of Contact (POCs) for the Lender. (Icon 1)
- POC Name: Select to open records for the POC. (Icon 2)
- 'Manage POCs' button: Used to add, edit, or deactivate POCs. (Icon 3)
- 'View All': Used to expand the list if all POCs are not visible. (Icon 4)



POC Type	POC Name	Job Title	Direct Email	Phone	Start Date
1 Main Lender Contact	Scylla Whirlpool		scyllawhirpool@medsea.g0	(123) 123-1234 #	3/15/2024
2 Oversight Contact	Charybdis Whirlpool		charybdiswhirlpool@medsea.g0	(123) 123-1234 #	3/15/2024
3 Technology Contact	Charybdis Whirlpool		charybdiswhirlpool@medsea.g0	(123) 123-1234 #	3/15/2024
4 Underwriter Contact	Charybdis Whirlpool		charybdiswhirlpool@medsea.g0	(123) 123-1234 #	3/15/2024

Inactive POCs will be displayed in the same manner in the Inactive Points of Contacts field.

POC Requirements

- ▶ The VARM(s) assigned by the Lender is responsible for adding and maintaining POCs in PPM.
- ▶ Lenders are required to have at least one active POC for each POC type (one person can be listed for more than one POC type).
- ▶ There is a maximum of three (3) POCs per POC type.

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

Active Points of Contacts (10+) Settings Refresh [Manage POC\(s\)](#)

10+ items • Sorted by POC Type • Updated 3 minutes ago

	POC Type ↑	POC Name	Job Title	Direct Email	Phone	Start Date
1	Assumptions/ROL Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
2	File Request	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
3	Funding Fee & Payment Issues	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
4	Loan/Quality Review	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
5	Main Lender Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
6	Management Liaison	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
7	Oversight Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
8	Report Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
9	SAR Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024
10	SAR Quality Review Contact	Ent Test TreePerson		ent@tree.person	(789) 894 - 6123#	5/17/2024

[View All](#)

Inactive Points of Contacts (0)

POC Types

- ▶ Main Lender Contact
- ▶ Management Liaison
 - ▶ File Request
- ▶ Loan/Quality Review
- ▶ Underwriter Contact
 - ▶ SAR Contact **
- ▶ SAR Quality Review Contact**
- ▶ Funding Fee & Payment Issues*
- ▶ Assumptions/Release of Liability (ROL) Contact*
 - ▶ Report Contact*
- ▶ Technology Contact*
- ▶ Oversight Contact*

*New POC Types

**SAR POCs are only required for Lenders with Lender Appraisal Processing Program authority.

Lender Profile – VA Relationship Managers Tab

The VA Relationship Managers tab shows:

1. Active and Inactive VARMs related to the Lender. (Icon 1)
2. Select the VARM Name to open the contact record. (Icon 2)
3. The 'Update Relationship' button is used to either deactivate an active VARM or activate an inactive VARM. (Icon 3)

Account PLACE LLC

+ Follow Edit

Company Information Points of Contact **VA Relationship Managers** Account Sponsors Account Agents Payment Information Documents

1 Active VA Relationship Managers (1) Update Relationship

1 Item • Updated a few seconds ago

	Contact Name	Start Date	Phone	Direct Email
1	Poseidon Olympian	3/1/2024	(123) 123-1234 #	poseidon@olympus.321

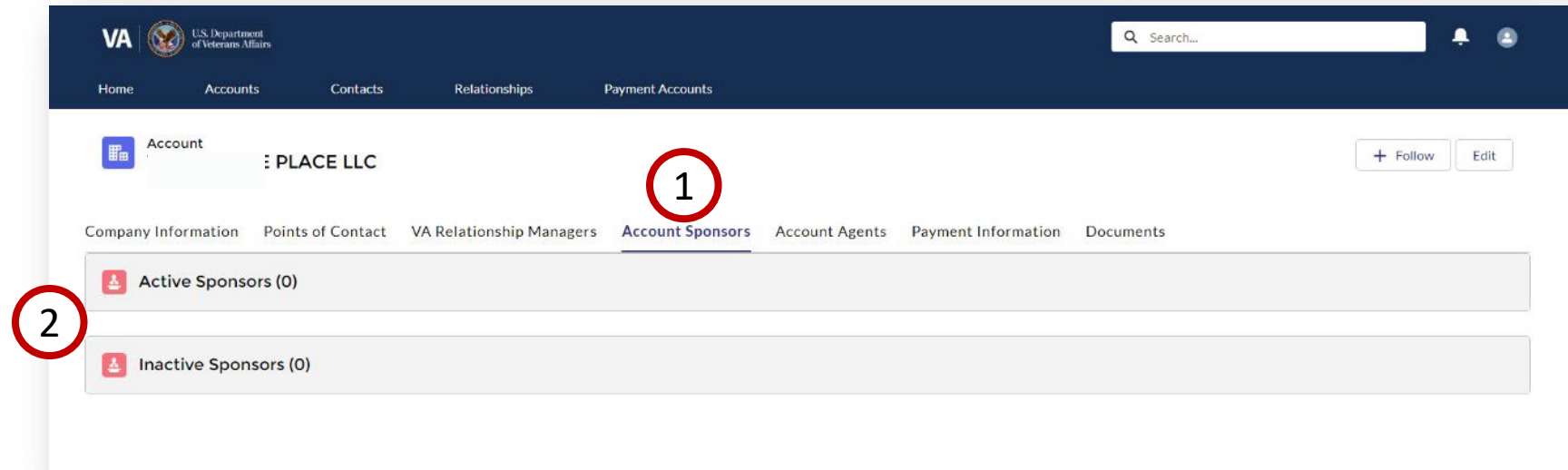
View All

0 Inactive VA Relationship Managers (0) Update Relationship

NOTE: VARMs should log in every 45 days to maintain access. (Reactivation process is included in the PPM Portal user guide.)

Lender Profile – Account Sponsors Tab

- ▶ Lenders who act as Agents for other sponsoring Lenders will see those relationships listed on this page.
- ▶ The Account Sponsors Tab will be visible in Lender Profiles for Lenders who function as Agents. (Icon 1)
- ▶ Both Active and Inactive Sponsors will appear in separate lists. (Icon 2)
- ▶ Note: Relationships must be established through a request from the sponsoring Lender.






Lender Profile – Account Agents Tab


- ▶ Lender Agents who have been approved by VA will be listed on the Lender's Agents tab. (Icon 1)
- ▶ The Agents Tab will be visible in Lender Profiles for Lenders who function as sponsors.
- ▶ Active and inactive Agents and submitted Agent applications will appear in separate lists. (Icon 2)
- ▶ Note: Lenders can establish a new Agent Relationship through the 'Add Relationship' button. (Icon 3) The 'End Relationship' button will remove a relationship. (Icon 4)


Account MORTGAGE

DBA Name Lender ID Company Status Lender Authority LAPP Indicator Probation
Active Non-Supervised without Auto Authority Yes No

Home Company Information Points of Contact VA Relationship Managers **Lender's Agents** More ▾

 Active Agents (0)  Add Agent Relationship  End Relationship

 Inactive Agents (0)

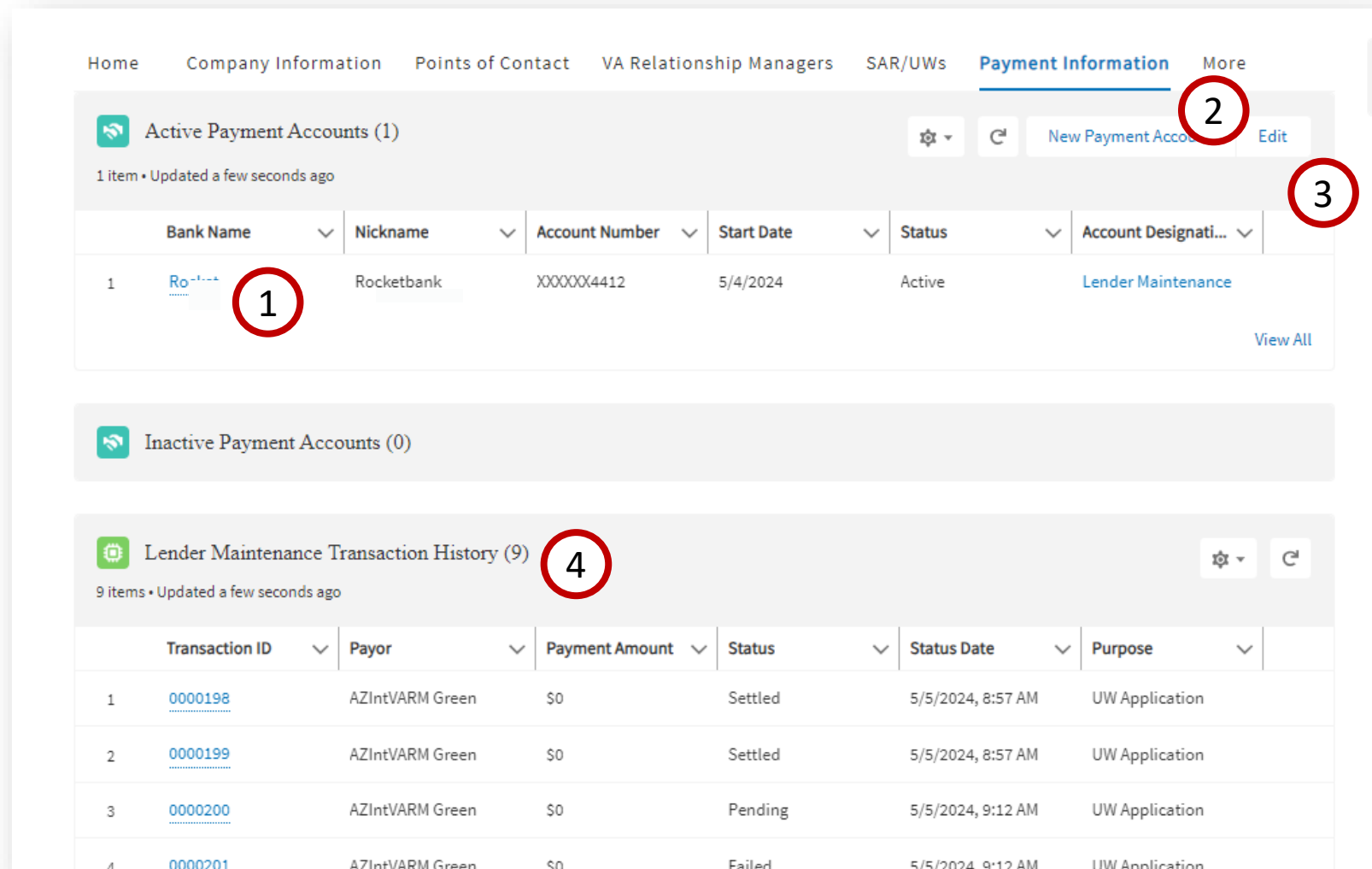
 Applications (1) 1 item • Updated a few seconds ago

Agent Company Name	Status	Created Date	Application ID
1 MORTGAGE CO	Pending	5/9/2024, 11:52 AM	ID-00000652




View All

Lender Profile – Payment Information Tab

- ▶ The Payment Information tab will list all active and inactive Payment Accounts associated with the Lender Profile.
 - ▶ Selecting the Bank Name allows users to view the record for that Payment Account. (Icon 1)
 - ▶ Select the 'New Payment Account' button to add a new Payment Account. (Icon 2)
 - ▶ Select the 'Edit' button to change which Payment Account is tied to the account designation. (Icon 3)
 - ▶ The Lender Maintenance Transaction History displays a record of payments submitted through the PPM Portal. (Icon 4)



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



Active Payment Accounts (1)   **New Payment Account** 

1 item • Updated a few seconds ago

	Bank Name	Nickname	Account Number	Start Date	Status	Account Designati...
1	Rocketbank	Rocketbank	XXXXXX4412	5/4/2024	Active	Lender Maintenance

[View All](#)

Inactive Payment Accounts (0)

Lender Maintenance Transaction History (9)  

9 items • Updated a few seconds ago

	Transaction ID	Payor	Payment Amount	Status	Status Date	Purpose
1	0000198	AZIntVARM Green	\$0	Settled	5/5/2024, 8:57 AM	UW Application
2	0000199	AZIntVARM Green	\$0	Settled	5/5/2024, 8:57 AM	UW Application
3	0000200	AZIntVARM Green	\$0	Pending	5/5/2024, 9:12 AM	UW Application
4	0000201	AZIntVARM Green	\$0	Failed	5/5/2024, 9:12 AM	UW Application

Lender Profile – Application Tab

- ▶ The Application tab will list all applications of any status that have been opened by the Lender.
 - ▶ Selecting the Application ID allows users to view the record for that Application. (Icon 1)
 - ▶ Select any of the column headings (Icon 2) to sort the list by that column type. (List will default to sorting by Application ID.)

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

Applications
All Application Statuses ▼

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

	Appl... ↑ ▼	Name ▼	Contact Name ▼	Application Type ▼	Status ▼	Stat... ▼	Sub... ▼	Created ... ▼	2
1	D-000010...	1ST		Agent Recognition	Expired	5/22/20...	5/16/20...	Lil	
2	ID-000010...	1ST	Gandalf Wizard	UW	Approved	6/3/2024	5/16/20...	Brad	
3	ID-000011...	1ST	brViolet varm	VARM	Approved	5/22/20...	5/22/20...	brViolet varm	
4	ID-000011...	1ST		Agent Recognition	Expired	5/24/20...	5/22/20...	brViolet varm	
5	ID-000011...	1ST		Agent Recognition	Expired	5/24/20...	5/22/20...	brViolet varm	
6	ID-000012...	1ST		Supervised Automatic ...	Pending	5/28/20...		brViolet varm	
7	ID-000012...	1ST		Agent Recognition	Pending	5/29/20...	5/29/20...	brViolet varm	
8	ID-000012...	1ST	Radegast TheBro...	UW	Approved	6/3/2024	5/29/20...	brViolet varm	
9	ID-000012...	1ST		Agent Recognition	Pending	5/30/20...	5/30/20...	brViolet varm	
10	ID-000012...	1ST		Agent Recognition	Approved	6/4/2024	5/30/20...	brViolet varm	
11	ID-000012...	1ST		Annual Renewal Requ...	Expired	6/5/2024		brViolet varm	

Lender Profile – Documents Tab

- ▶ Any documentation associated with the enrollment, validation, or other processes will appear here on the Documents tab, including communications from VA.
 - ▶ Existing documents can be opened by selecting the document name. (Icon 1)
 - ▶ New documents can be added by selecting 'Add Files.' (Icon 2)
 - ▶ Select 'View All' (appears at the bottom of the list) to view a complete list of the Lender Documents.
 - ▶ Documents can be sorted by selecting the column header. (Icon 3)

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

Documents (10+) Add Files

10+ items • Sorted by Document Type • Updated a few seconds ago

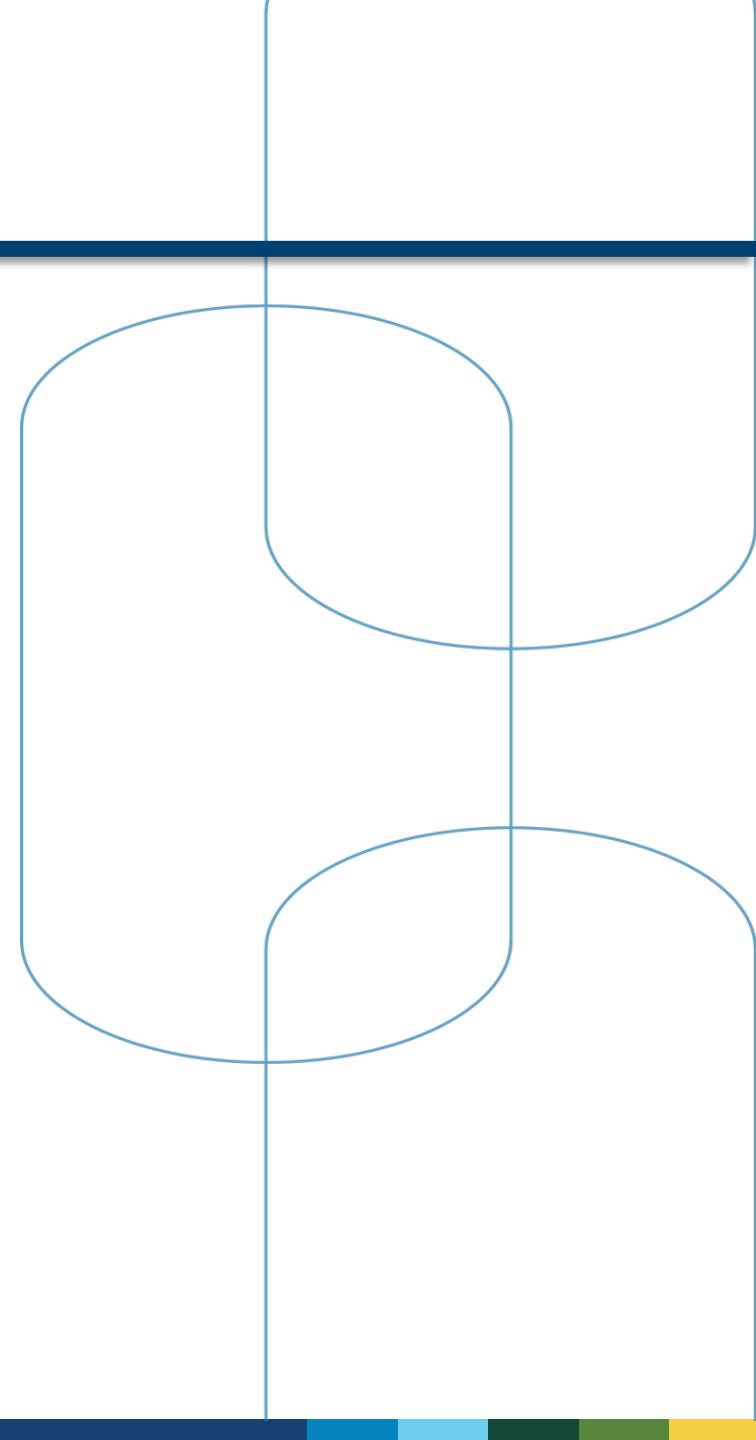
	Document Name	Document Type	Status	Created Date	Created By	Document Visi...
1	Blanket resolution file	Blanket Resolution	Ready for Download	5/7/2024, 11:28 AM	AsstOne LPOThirteen	Public
2	Resume	Corporate Resolution	Ready for Download	5/5/2024, 7:14 AM	LspOne SpecialistEleven	Public
3	ARU CRU Certificate	Corporate Resolution	Ready for Download	5/5/2024, 7:25 AM	LspOne SpecialistEleven	Public
4	Corporate resolution	Corporate Resolution	Ready to View	5/5/2024, 8:07 AM	LspOne SpecialistEleven	Public
5	Corporate resolution	Corporate Resolution	Ready for Download	5/8/2024, 6:00 AM	LPOne Policy	Public

Demo 2

▶ Lender Profile Tabs

- Editing Company Information
- POCs, VARMS, Agents, Sponsors, Payment Info, and Documents

▶ Manage POCs



What's Next?

- ▶ 1 Additional Training Session
 - PPM Processes (Such as Adding Agent Recognition Applications and Completing Renewals).

- ▶ User Guide
 - Will include step-by-step instructions and screenshots for Lender processes and screens.

Contact Us

LGY Policy and Program Questions

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LGY Technology Help

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Phone help

(877) 827-3702

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

VA



U.S. Department
of Veterans Affairs