Steps for Calyx: TPO (Third Party Originator) and TPOA File Submission

1. **Sign In:** https://privatemortgagegroup.calyxpath.com/Account/LogOn

Username: First Initial -Last Name (i.e., JDoe)

Temp Password: Pmg123!# (upon initial login a new password and recovery questions will need to be selected)

2. **Import:** FNM 3.2 or ULAD 3.4 File 1. (Remember to select which type so it loads properly)

3. **Production>Borrower** (If married both MUST be even if spouse will not be on the loan)

   Personal Information

       SSN/ITIN or 111-11-1111

       DOB

       Phone

       Email

       Citizenship

       Other Information
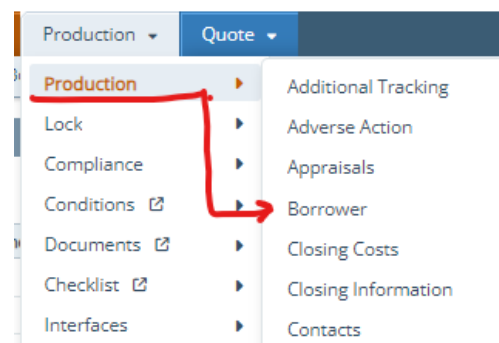
       Address

       Present Housing Expenses

       Income

       Assets

       Liabilities

       Property You Own

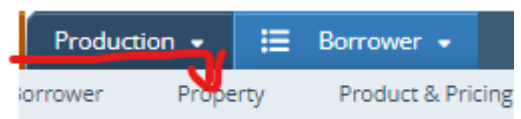   Declarations and Demographics

       Etc.

4. **Production>Property**

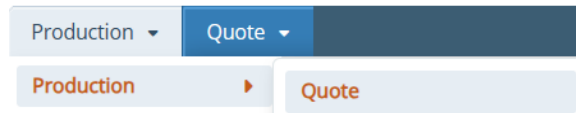   Subject Property information

       Contract information:

       Escrow Close Date

       Contract Date

       Seller (Click Dark Blue +)

5. Production>Quote Screen

Production ▾ | Quote ▾

Production ▸ | Quote

CREDIT: Reissue The Credit Report Credit

Check the boxes of the borrower, upper left
Select the credit vendor name
Credit Type
Request type i.e., new order or reissue
Select 3 box on the right (Equifax, Experian, and TransUnion)

Click Order

When the Credit Report Request screen pops up, verify the information and

Click Submit

When the report populates hit IMPORT ALL

6. Pick the Programs **Program**

Run Pricing **Pricing**
Fill in all RED boxes.
1. Lock Period: only option is 30
   Base Loan Amount
   Loan Type: Conventional
   Loan Purpose
   Total Loan Amount
   Desires Note Rate
   Appraised Value (If missing go to Production>Appraisal to enter)
   Property Occupancy
   Documentation Program Type (If P&L Select: GenericDocType11)
   Amortization Type

CREDIT SCORE
Citizenship (MUST Select NPRA (ITIN))
State
Zip
Property Type

2. Click **Search** **Search** Eligible Products will appear on top and ineligible products at the bottom with findings.
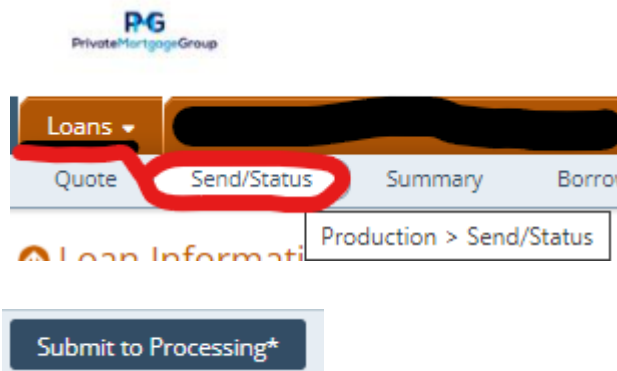
3. Select **Product** Select Product

4. Select **Price** Select Price

Production> Send/Status

PG
PrivateMortgageGroup

Loans ▾

Quote   Send/Status   Summary   Borro

Production > Send/Status

Loan Informati

Submit to Processing*

Our Team will Call the LO and Confirm LO Selected Compensation

Our team will review the entries and send out disclosures for you.
    Processor will ask for all the documents you already have
    Income
    ID
    ITIN or SSN
    Credit Report
    Purchase Agreement
    Contact information for Title
==NOTE: We must have an email address and phone number for the borrower and co borrower OR Non-Borrowing Spouse as all are required to sign some documents==