



VA MATRIX

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Package Type	Document Name	CX Number	Loan Type	Property Type	Citation	Required Language
Initial Disclosures	Warranty of Completion of Construction	47	New construction	Property fully completed except for customer preference items and those improvements for which escrows are permitted ¹	VA Lender's Handbook, Ch. 10, 10.08 and 10.09; 38 C.F.R. §§ 36.4367 & 36.4525 (2013)	VA Form 26-1859
	Nearest Living Relative	54	Any ²	Any ³	VA Circ. 26-88-32	None
	Federal Collection Policy Notice	55	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ⁴	VA Lender's Handbook, Ch. 6, 1-q and 2-c	VA Form 26-0503
	Counseling Checklist for Military Homebuyers	3521	Any	Any	VA Lender's Handbook, Ch. 5, 2-f; 38 C.F.R. § 36.4340(f)(2)(iii) (2013)	VA Form 26-0592
	Verification of VA Benefit-Related Indebtedness	3952	Any ⁵	Any	VA Lender's Handbook, Ch. 4, 6-b	VA Form 26-8937
	Request for Certificate of Veteran Status	3953	FHA	Any	VA Lender's Handbook, Ch. 2, 8-b	VA Form 26-8261a
	Request for a Certificate of Eligibility for VA Home Loan Benefits	3957	Any	Any	VA Lender's Handbook, Ch. 2, 1-b; 38 C.F.R. § 36.4514(a) (2013)	VA Form 26-1880
	Debt Questionnaire	3963	Any	Any	VA Circ. 26-89-13	VA Form 26-0551

¹ VA Lender's Handbook [Ch. 10, 10.8 and Ch. 9, 9.9](#).

² This was originally part of VA Form 26-1802a and has the same loan and property requirements.

³ This was originally part of VA Form 26-1802a and has the same loan and property requirements.

⁴ VA Lender's Handbook, [Ch. 6, 1-m](#).

⁵ VA Lender's Handbook, [Ch. 5, 6-a](#).

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	New Construction Subterranean Termite Soil Treatment Record	3969	New Construction	New Construction	VA Circ. 26-05-3; 38 C.F.R. § 36.4333(b) (2013)	Form NPCA-99b
	Subterranean Termite Soil Treatment Builder's Guarantee	3970	New Construction	New Construction	VA Circ. 26-05-3	Form NPCA-99a
	VA Amendment to Sales Contract (VA Amendatory Clause/Escape Clause)	14284	Any	Purchase	VA Circ. 26-03-4	VA Form 26-0286
	VA IRRRL Loan Comparison and Lender Certification	14501	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ⁶	VA Lender's Handbook, Ch. 6, 1-q (5); 38 C.F.R. § 36.4340(k) (2013)	VA Lender's Handbook, Ch. 6, 1-q (5)
	Application in Acquiring Specially Adapted Housing or Special Home Adaptation Grant	TBD	Any	Specially Adapted Housing	VA Circ. 26-06-2	VA Form 26-4555
Processing	Report and Certification of Loan Disbursement	52	Any	Any	VA Lender's Handbook, Ch. 3, 5-i, Ch. 5, 4-j and 5-a, and Ch. 6, 2-c; 38 C.F.R. § 36.4303 (2013)	VA Form 26-1820
	VA Loan Summary Sheet	57	Any	Any	VA Lender's Handbook, Ch. 5, 4-j and 5-a, and Ch. 6, 2-c	VA Form 26-0286

⁶ VA Lender's Handbook, Ch. 6. 1-m.

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	Request for Verification of Employment	17513 (<i>upon request</i>)	Any	Any	38 CFR §§ 36.4215(b) & 36.4340(f) (2013) VA Lender's Handbook, Ch. 4, 2-e and Ch. 5, 4-c and VA Circ. 26-12-6	VA Form 26-8497
	HUD/VA Addendum to Uniform Residential Loan Application	3981	Any	Any	VA Lender's Handbook, Ch. 3, 5-i, and Ch. 5, 4-c and 5-b	VA Form 26-1802a
Underwriting	Interest Rate Reduction Refinancing Worksheet	5535	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ⁷	VA Lender's Handbook, Ch. 3, 3-a	VA Form 26-8923
Closing	Escrow Waiver	28	Any	Any	38 C.F.R. § 36.4350(e); VA Servicing Guide Ch. 1.10	None
	Warranty of Completion of Construction	47	New Construction	New Construction	VA Lender's Handbook, Ch.10, 10.08 and 10.09; 38 C.F.R. §§ 36.4367 & 36.4525 (2013)	VA Form 26-1859
	Report and Certification of Loan Disbursement	52	Any	Any	VA Lender's Handbook, Ch. 3, 5-i, Ch. 5, 4-j, Ch. 5, 5-a, and Ch. 6, 2-c; 38 C.F.R. § 36.4303 (2013)	VA Form 26-1820
	Nearest Living Relative	54	Any ⁸	Any ⁹	VA Circ. 26-88-32	VA Circ. 26-88-32

⁷ VA Lender's Handbook, Ch. 6. 1-m.

⁸ This was originally part of VA Form 26-1802a and has the same loan and property requirements.

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	Federal Collection Policy Notice	55	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ¹⁰	VA Lender's Handbook, Ch.6, 1-q and 2-c	VA Form 26-0503
	Lender Loan Quality Certification	56	Any	Any	VA Lender's Handbook, Ch. 4, 1-d; 38 C.F.R. 36.4340(k)(2)(i)	VA Lender's Handbook, Ch. 4, 1-d(7)
	VA Loan Summary Sheet	57	Any	Any	VA Lender's Handbook, Ch. 5, 4-j, Ch. 5, 5-a, and Ch. 6, 2-c	VA Form 26-0286
	HUD/VA Addendum to Uniform Residential Loan Application	3981	Any	Veteran's home ¹¹	VA Lender's Handbook, Ch. 3, 5-i, and Ch. 5, 4-c and 5-b	VA Form 26-1802a
	CABO Statement, Lead-Free Water Piping	4390	New Construction	New Construction	VA Lender's Handbook, Ch. 10, Ch. 10.10	VA Lender's Handbook, Ch. 10, Ch. 10.10
	VA IRRRL Lender Certification	14500	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ¹²	VA Lender's Handbook, Ch. 6, 1-q (11)	VA Lender's Handbook, Ch. 6, 1-q (11)
	VA IRRRL Loan Comparison and Lender Certification	14501	IRRRL	Previously occupied by veteran or spouse of an active service member as his/her home ¹³	VA Lender's Handbook, Ch. 6, 1-q (5)	VA Lender's Handbook, Ch. 6, 1-q (5)

¹⁰ VA Lender's Handbook, Ch. 6. 1-m.

¹¹ VA Lender's Handbook, Ch. 5, 5-a.

¹² VA Lender's Handbook, Ch. 6. 1-m.

¹³ VA Lender's Handbook, Ch. 6. 1-m.

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	Origination Statement Itemizing 801, 1101, and Borrower Credits	14692	Any	Any	VA Circ. 26-10-1 and VA Circ. 26-10-9	VA Circ. 26-10-1 and VA Circ. 26-10-9
	VA "Not Inspected" Acknowledgment	17723	Purchase	New Construction	VA Lender's Handbook, Ch. 10.08	VA Lender's Handbook, Ch. 10.08
Upon Request	VA Compliance Inspection Report	5402	Any	New Construction or Existing Construction with major alterations, improvements, or repairs ¹⁴	VA Lender's Handbook Ch. 14, 14.01	VA Form 26-1839
	VA Loan Analysis	5533	Any	Any	VA Lender's Handbook, Ch. 1, 6-a; see 38 C.F.R. § 36.4340(f)(8) & (12) (2013)	VA Form 26-6393
	Escrow Agreement for Postponed Improvements	9256	Any	Property with Exterior Onsite Improvements	VA Lender's Handbook, Ch. 5, 6-b	VA Form 26-1849
	Manufactured Home Warranty (Limited Warranty)	13353	Any ¹⁵	New Manufactured Home	VA Lender's Handbook Ch. 13, 13.06; 38 C.F.R. § 36.4231 (2013); VA Circ. 26-95-9	VA Form 26-8599
	VA Request for Determination of Loan Guaranty Eligibility	14056	Any	Any	VA Lender's Handbook, Ch. 2, 3.b; 38 C.F.R. § 36.4302(l)(1) (2013)	VA Form 26-1817
	Request for Determination of Reasonable Value	14216	Any	Any	VA Lender's Handbook, Ch. 10, 10.11; 38 C.F.R. § 36.4339 (2013)	VA Form 26-1805

¹⁴ VA Lender's Handbook, Ch. 14, Overview.

¹⁵ 38 C.F.R. § 36.4231 (2013); VA Circ. 26-95-9.

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	Nonsupervised Lender's Nomination and Recommendation of Credit Underwriter	14217	Any	Any	VA Lender's Handbook, Ch. 1, 4-a	VA Form 26-8736a
	VA Equal Opportunity Lender Certification	14218	Any	Any	VA Lender's Handbook, Ch. 1, 2-a; 38 C.F.R. § 36.4340 (2013)	VA Form 26-8812
	Request for Acceptance of Changes in Approved Drawings and Specifications	14872	Construction	Condo	VA Lender's Handbook Ch. 14, 14.07; 38 C.F.R. §§ 4303 & 4367 (2013)	VA Form 26-1844