

## “How to” Generate Documents in Lender Online

All program documents have been placed in Lender Online for your convenience. They will always be the most current and up-to-date documents for each program.

All documents needed for each program will generate based on the program reserved in so there is no worry of missing or overlooked documents.

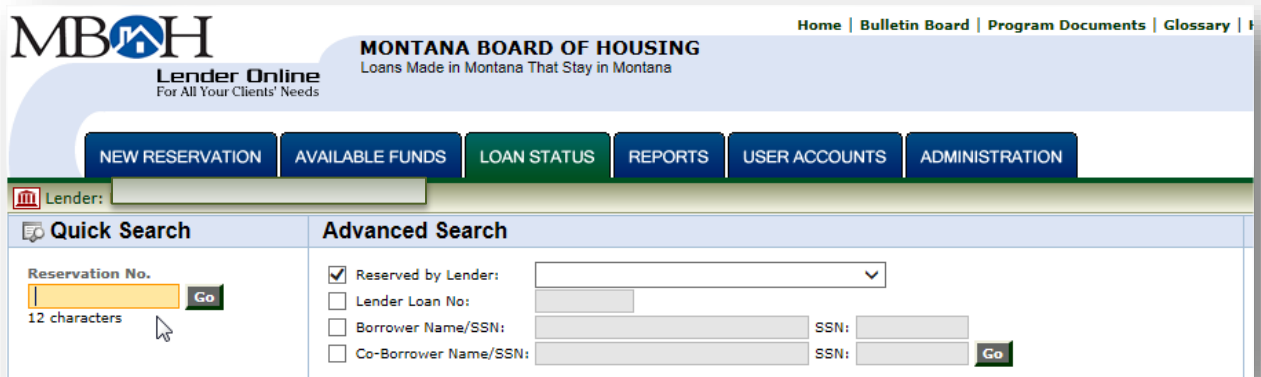
Here's how:

Log into Lender Online: <https://lenderonline.mt.gov/Bin/Display.exe/ShowSection>

Choose the LOAN STATUS tab



Enter the 12-digit MBOH reservation number under **Quick Search** and click **Go**



Under **Actions**, choose **PDF Docs**

The screenshot shows the MBOH Lender Online interface. At the top, there are navigation buttons: NEW RESERVATION, AVAILABLE FUNDS, LOAN STATUS, REPORTS, USER ACCOUNTS, and ADMINISTRATION. Below these is a search bar for the lender. The main content area is divided into 'Quick Search' and 'Advanced Search'. The 'Loans' section is active, showing 'Show Active Loans' selected. Below this, there are search results for a lender, including a 'Reset Search' button and a table with columns: Actions, Reservation, Lender Loan No., Borrower Name, Co-Borrower Name, and Status. The 'Actions' column contains icons for View, Reprint, PDF Docs, eDocs, and Delete.

Either check the top box, which puts a check mark in all the boxes in front of the documents, or put a check in the box by the document you need.

The screenshot shows the 'Select Documents' screen in the MBOH Lender Online interface. It features a 'Loan Status' sidebar with instructions and a note about Adobe Acrobat Reader. The main area is titled 'Select Documents' and contains a table with columns for 'Reservation/Loan No.' and 'Document Name'. A list of documents is shown, each with a checked checkbox: ACH Form, MBOH Uniform Rider, Mortgagor's Affidavit, Recapture Tax Fill in, Reg Bond Sub Voucher, and Sellers Affidavit. At the bottom, there are 'Generate Documents' and 'Cancel' buttons, and a page indicator 'Showing 1-6 of 6'.

Click the **Generate Documents** button

The screenshot shows the MBOH Lender Online interface. At the top, there is a navigation bar with the MBOH logo and the text "MONTANA BOARD OF HOUSING Loans Made in Montana That Stay in Montana". Below this is a menu with buttons for "NEW RESERVATION", "AVAILABLE FUNDS", "LOAN STATUS", "REPORTS", "USER ACCOUNTS", and "ADMINISTRATION". The "LOAN STATUS" button is highlighted in green. Below the menu is a "Lender:" dropdown menu. The main content area is titled "Loan Status" and contains a "Select Documents" section. On the left, there is a "Loan Status" sidebar with a "\$ ?" icon and instructions: "To generate a document with the corresponding loan information, select at least one document from the list and then click on the 'Generate Documents' button. If you don't wish to continue click on the 'Cancel' button." Below this is a "Note:" section: "You will need Adobe Acrobat Reader to view and/or print the document(s). The software is free and may be downloaded from www.adobe.com." and the Adobe Reader logo. The "Select Documents" section has a "Reservation/Loan No:" field and a table with columns "Document Name" and "Document Name". The table contains six rows, each with a checked checkbox and a document name: "ACH Form", "MBOH Uniform Rider", "Mortgagor's Affidavit", "Recapture Tax Fill in", "Reg Bond Sub Voucher", and "Sellers Affidavit". At the bottom right of the table, it says "Showing 1-6 of 6". At the bottom of the page, there are two buttons: "Generate Documents" and "Cancel". A mouse cursor is pointing at the "Generate Documents" button.

Click on the PDF for a Generated Document

The screenshot shows the MBOH Lender Online interface. At the top, there is a navigation bar with the MBOH logo and the text "MONTANA BOARD OF HOUSING Loans Made in Montana That Stay in Montana". Below this is a menu with buttons for "NEW RESERVATION", "AVAILABLE FUNDS", "LOAN STATUS", "REPORTS", "USER ACCOUNTS", and "ADMINISTRATION". The "LOAN STATUS" button is highlighted in green. Below the menu is a "Lender:" dropdown menu. The main content area is titled "Loan Status" and contains a "Generated Documents" section. On the left, there is a "Loan Status" sidebar with a "\$ ?" icon and instructions: "To print the loan information, click on one of the generated documents or click on the 'Print ALL Documents' button. If you don't wish to continue click on the 'Cancel' button." Below this is a "Note:" section: "You will need Adobe Acrobat Reader to view and/or print the document(s). The software is free and may be downloaded from www.adobe.com." and the Adobe Reader logo. The "Generated Documents" section has a list of six documents, each with a PDF icon and a document name: "ACH Form", "MBOH Uniform Rider", "Mortgagor's Affidavit", "Recapture Tax Fill in", "Reg Bond Sub Voucher", and "Sellers Affidavit". Below the list is a horizontal scrollbar. At the bottom of the page, there is a button: "Print ALL Documents".

All documents are either auto-populated with information pulled from the system or have a fill-in box for your convenience or BOTH.

Example: Some information auto-populated while other fields in blue are to be filled-in by the processor

**MBOH**  
Montana Board of Housing

**AUTOMATED CLEARING HOUSE (ACH) AUTHORIZATION FORM**

Borrower Name: **JANE DOE** MBOH Loan #: **03955505555**

Borrower Address: **123 Easy Street, Hometown, MT 59555**

Borrower Current Phone #: \_\_\_\_\_ Borrower Email: \_\_\_\_\_

Bank Name: \_\_\_\_\_

Bank Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Type: Checking \_\_\_\_\_ Savings \_\_\_\_\_

Payment Amount \_\_\_\_\_ + Extra Principal (optional) \_\_\_\_\_ = TOTAL Debit \_\_\_\_\_

Drawn on the: **5<sup>th</sup>** of the month OR **10<sup>th</sup>** of the month (please circle one option)

Beginning Date: \_\_\_\_\_

By submitting this application, you authorize Montana Board of Housing to withdraw from the account specified above for the amount due, shown as Total Debit above. In the event that your monthly payment increases when escrow analysis is run, you authorize us to increase the withdrawal amount by that amount.

By signing below I represent and warrant that I am legally authorized to access funds from the account specified.

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date

Attach a voided check from your bank.

YOUR NAME  
Your Address  
Your City, State Zip

Pay to the order of \$ \_\_\_\_\_ Dollars

YOUR BANK  
Bank City, State Zip

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

VOID

Credit Union Members: to ensure prompt processing of your ACH, please verify your account and routing/transit numbers with your Credit Union, since the correct numbers may be different than those appearing on your check.

Send the completed form to: Montana Board of Housing  
Mortgage Loan Servicing Department  
PO Box 200550  
Helena MT 59620-0550

Repeat the process for each document present for the loan.