

## “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**

The screenshot shows the top navigation bar with the Montana Housing logo and the text "MONTANA BOARD OF HOUSING Loans Made in Montana That Stay in Montana". Below this are several menu items: "NEW RESERVATION", "AVAILABLE FUNDS", "LOAN STATUS", "REPORTS", "USER ACCOUNTS", and "ADMINISTRATION". A search bar labeled "Lender:" is present. The main content area is divided into two sections: "Quick Search" and "Advanced Search". The "Quick Search" section has a text input field for "Reservation No." with a "Go" button and a note "12 characters". The "Advanced Search" section includes checkboxes for "Reserved by Lender:", "Lender Loan No:", "Borrower Name/SSN:", and "Co-Borrower Name/SSN:", along with corresponding input fields and a "Go" button.

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

This screenshot shows the same interface as above, but with search results displayed. The "Loans" section has checkboxes for "Show Active Loans" (checked) and "Show Archived Loans". Below this, it says "Results for Lender:" and includes a "Reset Search" button. A table header is visible with columns: "Actions", "Reservation", "Lender Loan No.", "Borrower Name", "Co-Borrower Name", and "Sta". Under the "Actions" column, there are 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.

**MONTANA HOUSING**  
Lender Online  
For All Your Clients' Needs

**MONTANA BOARD OF HOUSING**  
Loans Made in Montana That Stay in Montana

Home | Bulletin Board | Program Documents

NEW RESERVATION | AVAILABLE FUNDS | **LOAN STATUS** | REPORTS | USER ACCOUNTS | ADMINISTRATION

Lender: \_\_\_\_\_

**Loan Status**

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.

**Note:**  
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](http://www.adobe.com).

**Select Documents**

Reservation/Loan No: \_\_\_\_\_

<input checked="" type="checkbox"/>	Document Name
<input checked="" type="checkbox"/>	ACH Form
<input checked="" type="checkbox"/>	MBOH Uniform Rider
<input checked="" type="checkbox"/>	Mortgagor's Affidavit
<input checked="" type="checkbox"/>	Recapture Tax Fill in
<input checked="" type="checkbox"/>	Reg Bond Sub Voucher
<input checked="" type="checkbox"/>	Sellers Affidavit

Showing 1-6 of 6

**Generate Documents** **Cancel**

Click the **Generate Documents** button

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**Select Documents**

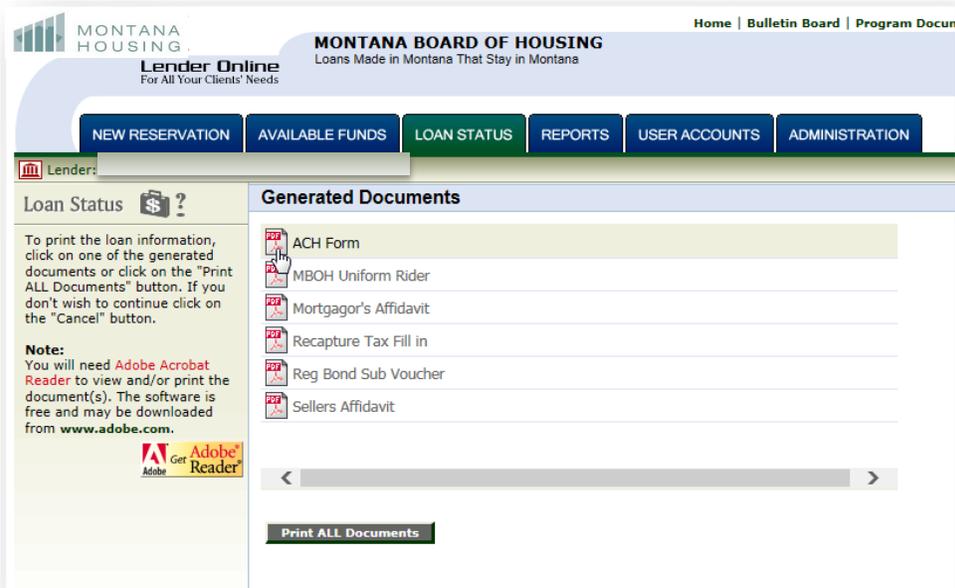
Reservation/Loan No: \_\_\_\_\_

<input checked="" type="checkbox"/>	Document Name
<input checked="" type="checkbox"/>	ACH Form
<input checked="" type="checkbox"/>	MBOH Uniform Rider
<input checked="" type="checkbox"/>	Mortgagor's Affidavit
<input checked="" type="checkbox"/>	Recapture Tax Fill in
<input checked="" type="checkbox"/>	Reg Bond Sub Voucher
<input checked="" type="checkbox"/>	Sellers Affidavit

Showing 1-6 of 6

**Generate Documents** **Cancel**

Click on the PDF for a Generated Document



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



AUTOMATED CLEARING HOUSE (ACH) AUTHORIZATION FORM

Borrower Name: JANE DOE MBOH Loan #: 039555055555

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: 5th of the month OR 10th of the month (please circle one option)

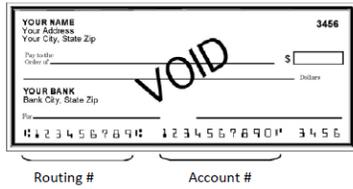
Beginning Date:

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.



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.