

“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.

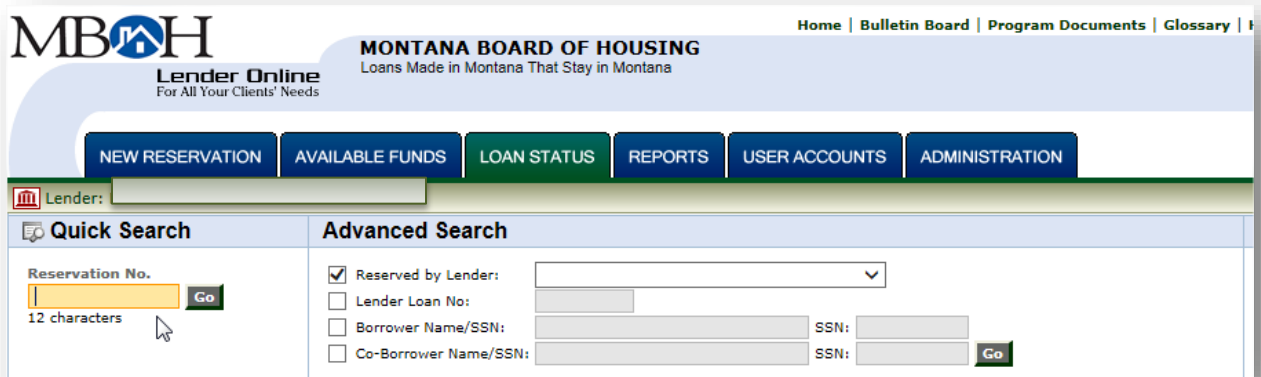
Here’s how:

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 table with columns for 'Reservation/Loan No.' and 'Document Name'. The table lists several documents, each with a checked checkbox in the first column. Below the table, there are 'Generate Documents' and 'Cancel' buttons. A note on the left side of the screen provides instructions on how to generate documents and mentions the need for Adobe Acrobat Reader. The page also indicates 'Showing 1-6 of 6'.

Reservation/Loan No.	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

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' and '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, there is a 'Lender:' field and a 'Loan Status' section with a '\$?' icon. To the right of the 'Loan Status' section is a 'Select Documents' section. It contains a table with columns 'Reservation/Loan No.' and 'Document Name'. The table lists six documents, each with a checked checkbox: 'ACH Form', 'MBOH Uniform Rider', 'Mortgagor's Affidavit', 'Recapture Tax Fill in', 'Reg Bond Sub Voucher', and 'Sellers Affidavit'. Below the table are two buttons: 'Generate Documents' and 'Cancel'. A mouse cursor is pointing at the 'Generate Documents' button. At the bottom right of the table area, it says 'Showing 1-6 of 6'. On the left side of the page, there is a 'Loan Status' section with 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.' There is also an 'Adobe Reader' logo.

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' and '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, there is a 'Lender:' field and a 'Loan Status' section with a '\$?' icon. To the right of the 'Loan Status' section is a 'Generated Documents' section. It contains a list of six documents, each with a PDF icon: 'ACH Form', 'MBOH Uniform Rider', 'Mortgagor's Affidavit', 'Recapture Tax Fill in', 'Reg Bond Sub Voucher', and 'Sellers Affidavit'. Below the list is a 'Print ALL Documents' button. At the bottom of the list area, there is a navigation bar with left and right arrows. On the left side of the page, there is a 'Loan Status' section with 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.' There is also an 'Adobe Reader' logo.

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

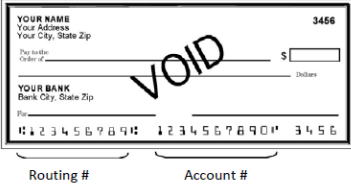
Beginning Date: _____

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.



The diagram shows a check with a large 'VOID' watermark. Labels indicate the routing number (1234567890) and account number (1234567890123456).

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.