

“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 Montana Board of Housing Lender Online interface. At the top, there is a navigation bar with links for Home, Bulletin Board, Program Documents, and Glossary. Below this is a header with the Montana Housing logo and the text "MONTANA BOARD OF HOUSING - Loans Made in Montana That Stay in Montana". A secondary navigation bar contains buttons for NEW RESERVATION, AVAILABLE FUNDS, LOAN STATUS, REPORTS, USER ACCOUNTS, and ADMINISTRATION. The main content area is divided into two sections: "Quick Search" and "Advanced Search". The "Quick Search" section is highlighted with a red box and contains a text input field for "Reservation No." with a "Go" button. 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 the previous one, but with the search results displayed. The "Quick Search" section now shows a reservation number of "f 601". The "Advanced Search" section has the "Reserved by Lend" checkbox checked and the dropdown menu set to "f 601". Below the search sections, there are radio buttons for "Show Active Loans" (checked) and "Show Archived Loans". The results section shows "Results for f 601" and a "Reset Search" button. At the bottom, there is an "Actions" menu with icons for View, Reprint, PDF Docs, and eDocs. The "PDF Docs" icon is circled in red.

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 Docum

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

01

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.

Select Documents

Reservation/L: MEGAN

<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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WY 601

Loan Status ?

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Note:
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Select Documents

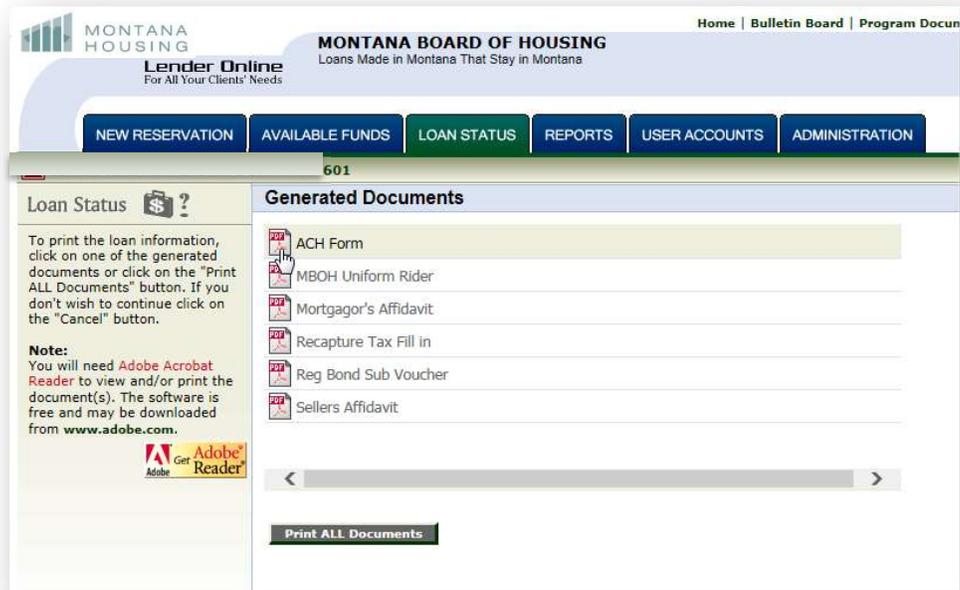
Reservation/L: MSON, MEGAN

<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)

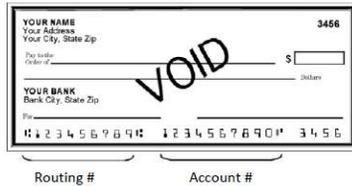
Beginning Date: _____

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.