
Printing Generic e-Loan Forms

INTRODUCTION

You can now print several generic loan forms electronically using ProDOC, the eDOC Solutions eDocument printing software. You can access these generic eLoan documents from the Print Loan Forms screen (MNLOAN #20), the Loan Application screen, and the Print Loan screen. You can also print the blank loan forms via an electronic printer. The loan generic loan forms currently available include: the generic 5-page Loan Application, the Short Form loan application, the Loan Officer Worksheet, and the Loan Denial Notice.

This booklet will cover the configuration for using e-Loan forms, as well as the screens from which you can print the forms.

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Revision date: August 6, 2009

For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php
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CONFIGURING THE EDOC PRINTER AND TERMINAL

In order to print the new generic e-Loan forms, you first need to have ProDOC installed on your computer, a printer configured to handle e-Forms, and a print session for this printer pointing to the iSweep appliance housing the eForms. Additionally your workstation must be set to use this printer as its default printer. Each workstation will need its own configured printer and print session.

- **Contact a CU*Answers technical Systems Team employee to assist you with this setup, including configuring the printer, the print session and the terminal configuration for your computer.**

An eDOC printer must have a Type of E = eDOC.

This printer has a Type of E = eDOC.



PRINTING LOAN FORMS

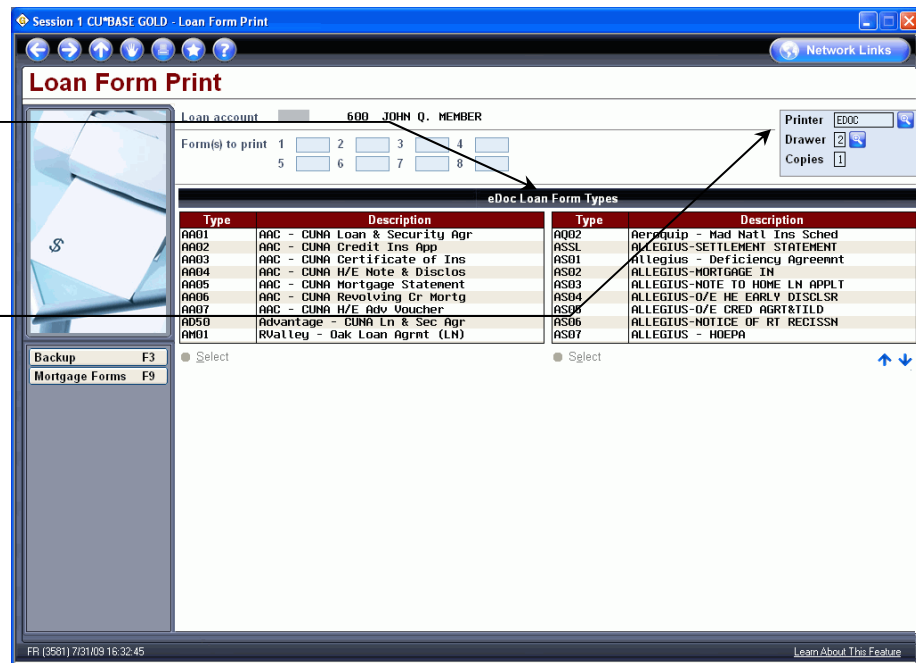
The rest of this manual will assume that the eDOC printer has been set as the default printer. With this configuration in place, your computer will default to show the loan forms that are e-Loan forms. Only e-Loans will show on the screen initially. You will then be able to select a standard printer to show a comprehensive listing of all CU*BASE standard loan forms (as opposed to e-Loans printed by the eDOC printer).

You can access e-Loan forms from three different CU*BASE Screens: Print Loan Forms, Print Loan Form Application and Loan Creation.

MNLOAN #20 Print Loan Forms (eDOC Printer Selected)

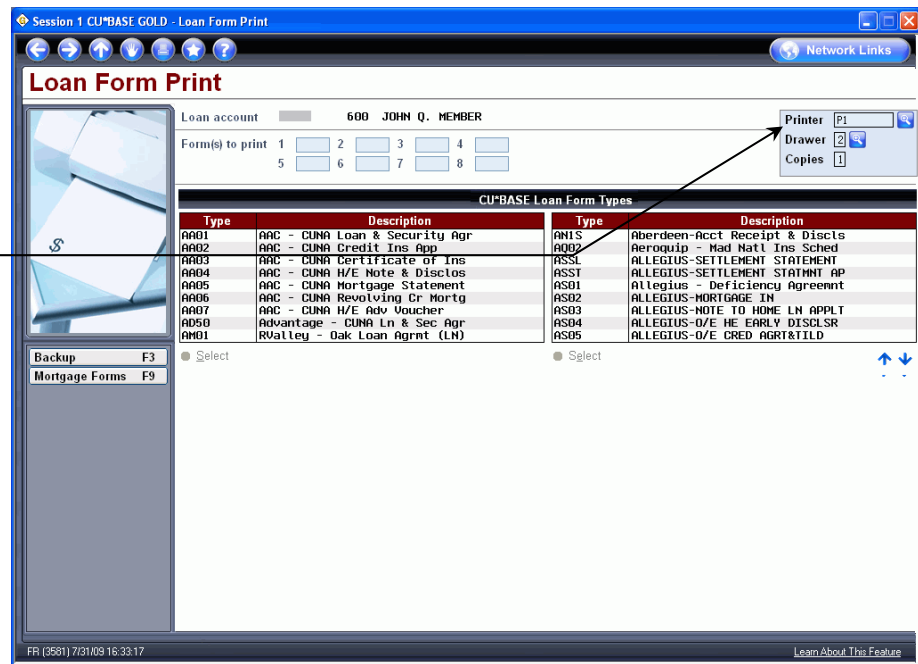
This label indicates that eDOC loan forms have been selected. Note how this changes with the next image.

Here the eDOC printer is selected so the e-Loan forms are listed on the screen. This would be the default with the previously shown configuration.



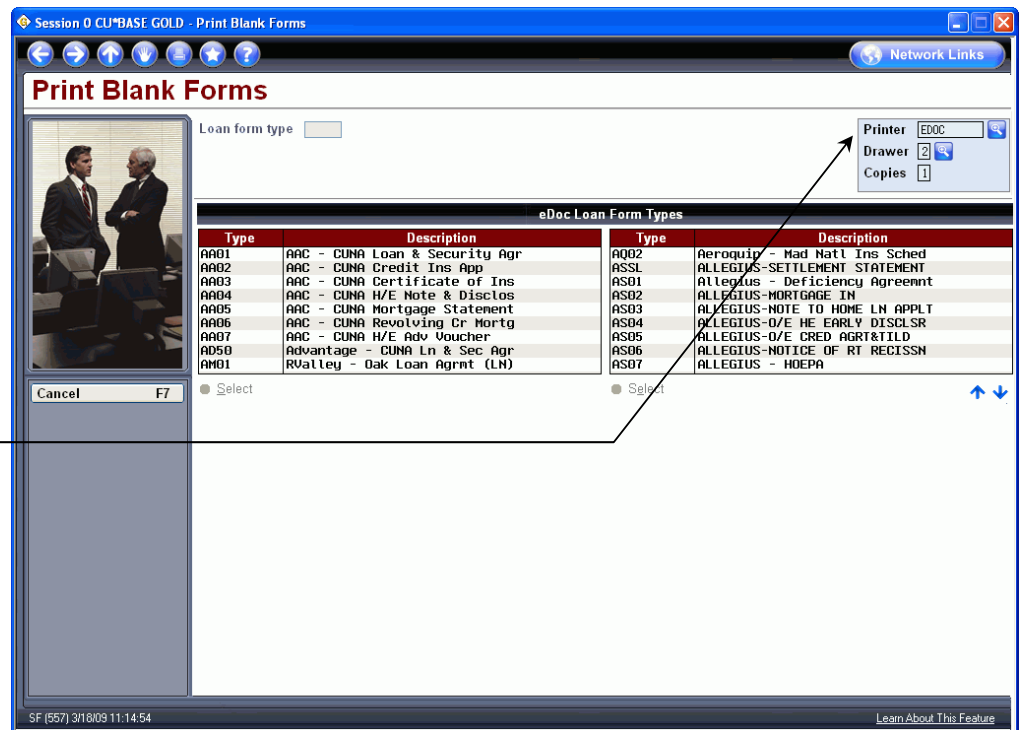
Same Screen (Laser Printer Selected)

If you change to a laser printer, all the standard CU*BASE loan forms will show on the screen. The label above the loans also indicates that we are currently viewing CU*BASE loan forms.



Print Blank Loan Forms (eDOC Printer Selected)

Here this screen defaults to show the e-Loan forms that can be printed with the selected eDOC printer. You can change this printer to view a listing of the CU*BASE loan forms.



The Print Blank Loan forms also defaults to the e-Loans (due to the configuration previously shown). By changing the printer, you can view a listing of the standard CU*BASE loan forms.

Printing a Loan Application (eDOC Printer Selected)

This screen also defaults to the e-Loan forms due to the configuration.

Printer ID: **EDOC** Drawer: **2** Copies: **1**

CU*BASE Standard Forms

Application type: **[Dropdown]** Forms to print: 1 2 3 4
 5 6 7 8

Include Applicant's comments
 Include Co-applicant's comments

Loan officer worksheet: **[Dropdown]**

| Type | Description | Type | Description |
|------|---------------------------------|------|--------------------------------|
| ASST | ALLEGIOUS-SETTLEMENT STATMNT AP | ELOW | GEN LOAN APP WORSHEET (EDOC) |
| AS1A | ALLEGIOUS-PRELIM TILD | FRTA | Frankenmuth - Addendum |
| AS3A | ALLEGIOUS-NOTICE HM LN APPL | GFBA | Prospera - CUNA Good Faith Est |
| AS4A | Allegius-App revolv credit pln | GFCT | Svcs Ctr - Oak Tree Good Faith |
| BTHE | Berrien - CUNA H/E Application | GFHA | NOT USED - Hardin Good Faith |
| CV1A | Cumberland - CUNA Adverse AP | GFKV | TEST FOR BT |
| EAP1 | GENERIC SHORT APPLICATION-EDOC | HCSA | Harris - CUNA Adverse Act (AP) |
| EAPP | GENERIC LOAN APPLICATION(EDOC) | HRAP | Hometown - MM Master Applic |
| EAP1 | GENERIC SHORT APPLICATION-EDOC | HTAP | Heartland - Application |
| EDED | LOAN DENIAL NOTICE (EDOC) | HTCA | Heartland-MasterCard Applicatn |

Buttons: Loan Req/Personal, Employment, Income, References, Assets, Real Estate Loans, Loans/LOCs, Credit Cards/Debts, Misc/Comments, Summary, Print

Again, the Print Loan Application screen defaults to the e-Loan listing, but by changing the printer a listing of the standard CU*BASE loan forms is shown (see following image).

Printing a Loan Form Application (Laser Printer Selected)

Printer ID: **PI** Drawer: **2** Copies: **1**

CU*BASE Standard Forms

Application type: **[Dropdown]** Forms to print: 1 2 3 4
 5 6 7 8

Include Applicant's comments
 Include Co-applicant's comments

Loan officer worksheet: **[Dropdown]**

| Type | Description | Type | Description |
|------|---------------------------------|------|--------------------------------|
| ASST | ALLEGIOUS-SETTLEMENT STATMNT AP | ELOW | GEN LOAN APP WORSHEET (EDOC) |
| AS1A | ALLEGIOUS-PRELIM TILD | FRTA | Frankenmuth - Addendum |
| AS3A | ALLEGIOUS-NOTICE HM LN APPL | GFBA | Prospera - CUNA Good Faith Est |
| AS4A | Allegius-App revolv credit pln | GFCT | Svcs Ctr - Oak Tree Good Faith |
| BTHE | Berrien - CUNA H/E Application | GFHA | NOT USED - Hardin Good Faith |
| CV1A | Cumberland - CUNA Adverse AP | GFKV | TEST FOR BT |
| EAP1 | GENERIC SHORT APPLICATION-EDOC | HCSA | Harris - CUNA Adverse Act (AP) |
| EAPP | GENERIC LOAN APPLICATION(EDOC) | HRAP | Hometown - MM Master Applic |
| EAP1 | GENERIC SHORT APPLICATION-EDOC | HTAP | Heartland - Application |
| EDED | LOAN DENIAL NOTICE (EDOC) | HTCA | Heartland-MasterCard Applicatn |

Buttons: Loan Req/Personal, Employment, Income, References, Assets, Real Estate Loans, Loans/LOCs, Credit Cards/Debts, Misc/Comments, Summary, Print

Additionally when you create the loan, by using F10-Forms you can access a Form Window which allows you to select to print specific loan forms. If the default printer is an e-DOC printer, the e-Loan forms will appear in this listing. Change the printer on the following screen to view the listing of standard CU*BASE loan forms.

Loan Creation Screen

Loan Creation

Loan account # MARY MEMBER
 Loan category 14 NEW VEHICLES
 Application # 70811

Assign account type 605 Low 605 High 608

Approval ID Collector ID XXX Interviewer ID 92
 File verification date Aug 23, 2009 [MMDDYYYY]
 Credit report # (Primary borrower)
 CU risk level

Additional Information

Collateral Participation loan Variable rate loan
 Automatic transfer Additional signers Credit card maintenance
 Payroll deduction Payment matrix ACH maintenance
 Link to dealer Pledged shares

Disburse funds
 Form(s) to print 1 2 3 4 5 6 7 8

Warning: If a recent credit report exists for this member, the Credit rpt # and CU risk level fields will be filled in automatically, using the most recent report on file for the primary borrower. This links the report to this loan so that it will be archived and available for viewing throughout the life of the loan. Any additional signers on this loan will also be linked to the most recent credit report in their name, if one exists in the file.

FR (2346) 01/03/09 14:07:16 [Learn About This Feature](#)

Use F10-Forms to view the following screen which, due to the e-DOC printer configuration, shows only e-Loan Form Types:

Loan Form Types

| Type | Description |
|------|--------------------------------|
| AA01 | AAC - CUNA Loan & Security Agr |
| AA02 | AAC - CUNA Credit Ins App |
| AA03 | AAC - CUNA Certificate of Ins |
| AA04 | AAC - CUNA H/E Note & Disclos |
| AA05 | AAC - CUNA Mortgage Statement |
| AA06 | AAC - CUNA Revolving Cr Mortg |
| AA07 | AAC - CUNA H/E Adv Voucher |
| AD50 | Advantage - CUNA Ln & Sec Agr |

● Select

SF (2347) [Learn About This Feature](#)

Once you print the forms in CU*BASE it will appear in ProDOC. If a signature is needed, have the member sign on the signature pad. Then print the form by clicking the Print button. Follow this by selecting Save to archive the loan form.

ProDOC - Signature Capture (BBROWN)

Form Name: EAPP Page 1 of 5 Scan Page Scan Options...

*Account: 1107
 *Last Name: BROWN
 *First Name: [Redacted]
 Other: [Redacted]
 *Required

Application Number: 41791

Loan Application

Loan Information

| Applicant Name | Other Name |
|---------------------|-----------------|
| [Redacted] H. BROWN | WENDIE P. BROWN |

Amount Requested: \$ 1500.00 Purpose: AUTO LOAN Interest Rate: 12.000 %
 Payment: \$ 42.19 Number of Payments: 68
 Repayment Method: Payroll Deduction Cash Automatic Transfer from Account Automatic Payment
 Description of Collateral: Multiple Estimated Value of Collateral: \$ 400000.00

Personal Data

| Applicant | | Other (Co Applicant, Spouse, Guarantor) | |
|--|---|---|-------|
| State | State | State | State |
| MI | MI | MI | MI |
| 8125252525252525 | 8321232323232323 | | |
| 1107 | 111-22-3333 | | |
| 12-24-678 | 11-22-3333 | | |
| 07/01/1981 | 11/27/2001 | | |
| 616-784-1890 | 616-522-5525 | | |
| Married <input checked="" type="checkbox"/> Separated <input type="checkbox"/> Unmarried <input checked="" type="checkbox"/> | Married <input type="checkbox"/> Separated <input checked="" type="checkbox"/> Unmarried <input type="checkbox"/> | | |
| 123 ADDRESSXXXX ADDRESSXXXX CITYXXXXXXX MI 99999 | 123 FLORES HERNDAS LILLY MI 44444 | | |
| Old <input checked="" type="checkbox"/> New <input type="checkbox"/> Date Moved To This Address: 01/25/2007 333 OLD ADDRESS OLD CITY MI 49494 9999 | Old <input type="checkbox"/> New <input checked="" type="checkbox"/> Date Moved To This Address: 06/01/2005 123 MAIN ST KALAMAZOO MI 49024 0000 | | |
| Old <input type="checkbox"/> New <input checked="" type="checkbox"/> Date Moved To This Address: 01/25/2007 | Old <input type="checkbox"/> New <input type="checkbox"/> Date Moved To This Address: 01/01/1980 | | |

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User Print Pending Save Cancel