
Printing Electronic Loan Forms

INTRODUCTION

Using electronic loan forms, a loan officer can generate a loan form in an electronic format, have the member sign with a signature pad, print the loan form if needed, and archive the loan form in the secure managed server.

This booklet will cover the screens from which you can print the forms.

CONTENTS

OVERVIEW OF TERMINOLOGY	2
CHECK OUT THIS BROCHURE!	3
DAILY ROUTINE FOR ELOAN FORM PRINTING	4
AUTOMATED LOGIN TO PRODOC – SINGLE SIGN ON	4
SELECTING THE ELOAN FORMS	6
PRINTING AND AUTHORIZING ELOAN FORMS	9
ARCHIVING THE ELOAN FORM	10
ADDITIONAL INFORMATION NEEDED TO COMPLETE FORM	11

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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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OVERVIEW OF TERMINOLOGY

The following terms are used in this booklet (listed alphabetically):

<i>Term</i>	<i>Description</i>
Custom eLoan Forms	These are eLoan forms that are specific to the credit unions and require custom programming.
ePrinter	This is a printer that is specially configured in CU*BASE by a CU*Answers Systems Team member to handle eLoan form printing.
Generic eLoan Forms	These are CU*BASE eLoan forms that are automatically available to all CU*BASE clients—no custom programming is needed.
Gweep appliance	This is the device that is housed at the Credit Union branch that provides the transfer point of the eLoan form from the loan officer work station and the archive database. This appliance is also used to distribute updates to electronic loan forms or new electronic loan forms.
Pending button	This button allows eLoan forms to be saved in Pending folder. This allows co-signers to sign loan documents at different times and locations than the initial signer.
Pending folder	This folder is a temporary holding location for documents that require additional action prior to printing and final saving. Credit union employees use ProDOC to access this folder and its contents.
ProDOC	Once an eLoan form is printed through CU*BASE, this software creates the eLoan form and displays it on the screen, allowing the member to enter electronic signatures in the appropriate locations.
Signature box	This is the field on the computer screen where the credit union employee can view the signature.
Signature pad	This device is connected to the computer via a USB connection. This device has a stylus which is used by the member to write his or her signature. The electronic signature software collects the imprint of the stylus on the pad and this imprint is then viewable by a credit union employee in the signature box of the eLoan.
SwiftView	Third-party software that converts the CU*BASE print stream to an image, allowing you to capture electronic loan forms in ProDOC.

CHECK OUT THIS BROCHURE!



Check out **eForms: Programming Your Forms in CU*BASE**, the third in a three part series on developing and implementing an eDocument solution. Find all three brochures in the *eDocuments: Electronic Documents Strategies and Solution* section of the Special Interest Docs page: http://www.cuanswers.com/client_special_interest.php#e

Go directly to the brochure shown to the left using this website address:

http://lendervp.com/wp-content/uploads/ProgrammingYourForms_book3.pdf

Included in this brochure:

This document explains how Lender*VP can take your credit union's forms (the ones you purchase from a forms provider like Oak Tree or CUNA) and do the programming work needed so that data from CU*BASE® can be placed onto the form and a completed form produced for printing and archiving in the CU*Spy electronic documents vault.

If you use the CU*Spy vault, forms you can have programmed for archival include:

- Generic CU*BASE Loan Forms
- Custom Loan and Application Forms
- Membership Agreement (the "Signature Card")

If the data needed on the form isn't already part of the CU*BASE database, then special screens will be developed so that your staff can fill in that additional data at the time the form is generated. If a member signature is needed on a form, then we'll put in the proper hooks so that the ProDOC FORMS™ tool stops to allow a signature to be captured and stored with the form. And if you need to produce a certain group of forms at the same time, every time, we can even set up forms bundles to make the process easy and smooth for your loan staff.

Since there are several places in CU*BASE where forms might be needed, this document helps you decide how each form will be used, where you might need to be able to access it, and how much it will cost and how long it will take to get the form ready to go.

DAILY ROUTINE FOR ELOAN FORM PRINTING

In order to print these eLoan forms, you must first log into both ProDOC and your printer session for the e-Printer.

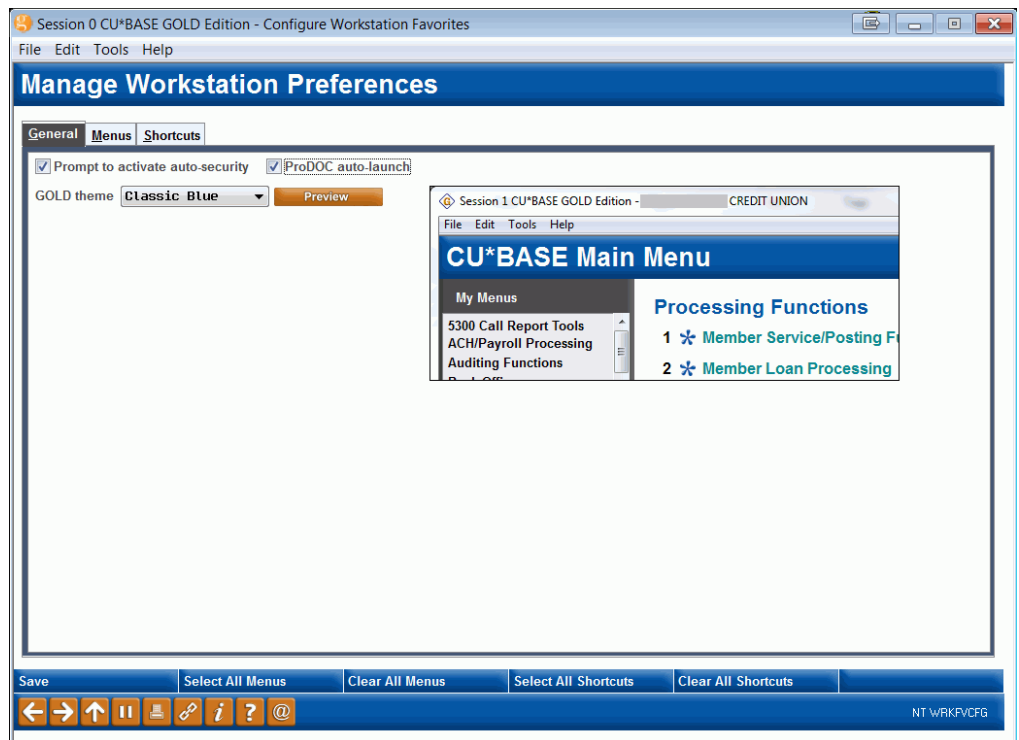
AUTOMATED LOGIN TO PRODOC – SINGLE SIGN ON

If you check *ProDOC auto-launch* in your Workstation Favorites in CU*BASE, you will automatically be logged into ProDOC when you sign into CU*BASE in the morning. You will not need to log in separately to ProDOC.

1. To access the Workstation Favorites screen, click this button from any CU*BASE screen.



2. Then on the Workstation Favorites screen (shown below), check *ProDOC auto-launch*.



3. Press Enter.
4. The next time you log into CU*BASE, you will automatically also be logged into ProDOC.

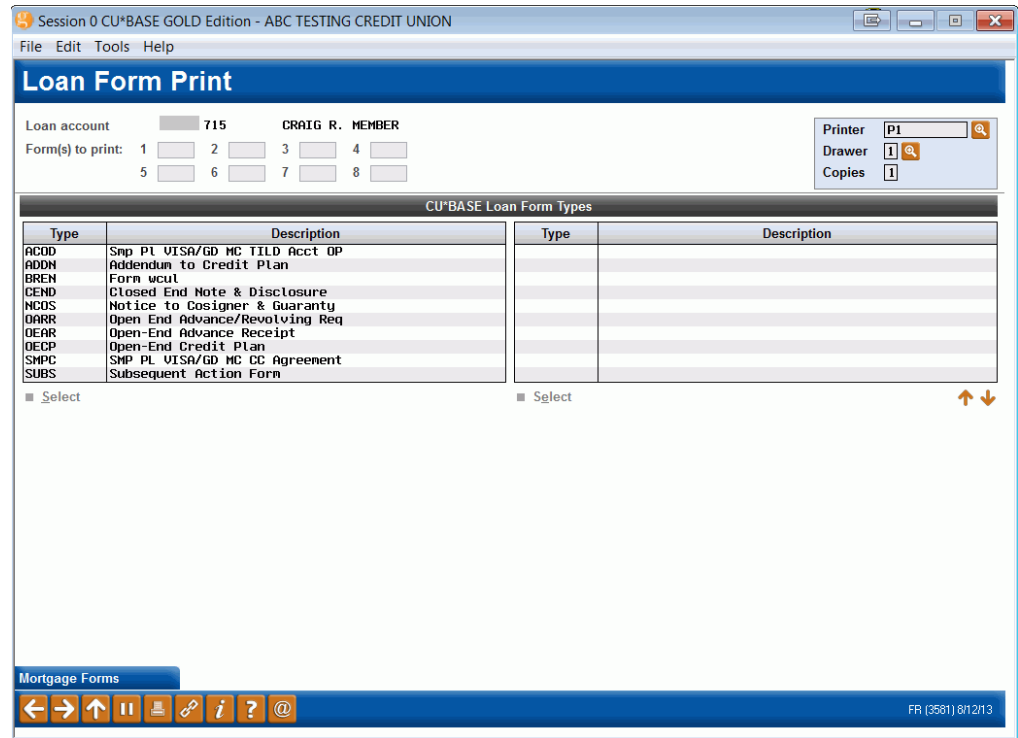
Always remember to log into your thermal printer sessions. You may need to log into more than one thermal printer session (for multiple printers).

Once you have logged into both your printer session and ProDOC, you are ready to print your electronic loan forms.

SELECTING THE ELOAN FORMS

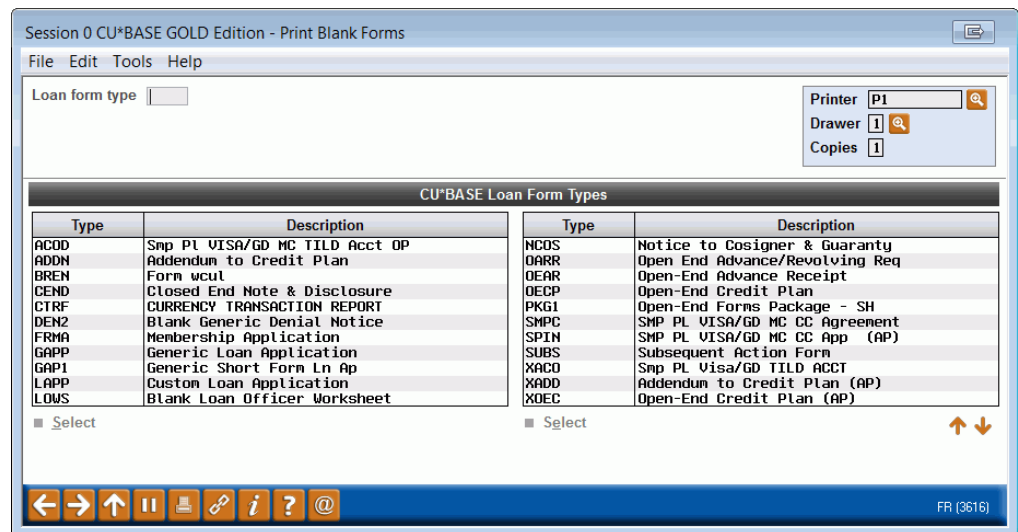
You can access eLoan forms from three different CU*BASE Screens: Print Loan Forms, Print Loan Form Application and Loan Creation.

“Print Loan Forms” on the Lending Functions (MNLOAN) menu



- For systems converted prior to March 2012, you may need to enter the electronic loan printer to view your eForms.

“Print Blank Loan Forms” from entry screen



Printing a Loan Application

Additionally when you create the loan, by using *Form Window* (F10) you can access a Form Window which allows you to select to print specific loan forms.

Loan Creation Screen

You can also print several generic loan forms as well as your customized loan forms. Access these generic eLoan forms via **Print Loan Forms** accessed on the Lending Functions (MNLOAN) menu, the Loan Application screen, and the Print Loan screen. You can also print the blank loan forms via your e-document printer. The generic loan forms currently available include: the generic 5-page Loan Application, the Short Form loan application, the Loan Officer Worksheet, and the Denial Notice Form.

PRINTING AND AUTHORIZING ELOAN FORMS

Use CU*BASE to generate your electronic loan form the same way that you print your laser loan forms. An electronic copy of the loan form will appear on the screen pre-populated with the member data collected in CU*BASE. This electronic presentment is similar to the way an electronic receipt is presented in ProDOC, if you are currently using that system.

- Please allow for a brief delay before the form is presented.

Individual fields will appear at each location where you need the member to sign or initial the loan form. By pressing the Tab key you can advance through fields on the loan form, each time allowing the member to sign or write initials on the signature pad, thereby authorizing each section of the loan form. Once the member signs the signature pad and you tab to the next field, that field becomes the active field.

- To clear a field of its contents, right click on the field and select Retry. To clear the contents of all fields, use the Re-Sign button at the top of the ProDOC form.

Example of Electronic Loan Form with One Signature

This electronic loan form is presented on the loan officer's screen in the ProDOC software. Notice how the member data from CU*BASE is already populated.

Close Up of Signature Line of Electronic Loan Form

Before you press Tab, the signature may appear smaller, but once you press Tab, the signature will stretch and will appear as shown here.

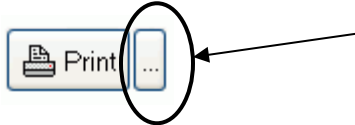
Once signatures or initials have been collected for all of the fields, a copy of the electronic loan form can be printed for the member by clicking the Print button. See image on previous page to view the entire ProDOC screen. Note

the buttons shown below are on the lower right hand corner.

Button Bar of ProDOC - Print



- **NOTE:** The Ellipsis next the Print button allows you to select whether to print the forms with or without signatures. Generally you would select to print the forms with signature, if no signatures exist, the forms will still print. **Do Not select *Print Original Files*.** This selection is used with e-Receipt printing. You have the option of changing this selection at a later time.



ARCHIVING THE ELOAN FORM

Once the form is printed, click the Save button to archive a copy of the electronic loan form. The electronic loan form will then be archived in the CU*Answers secure managed server.

- **WARNING!!** Once this button is clicked, you cannot alter the electronic loan form. See the next section “Additional information needed to complete form” for information on how to save a “pending” version of the form so that additional information can be added at a later date, such as a co-signer’s signature.

Button Bar of ProDOC - Save



ADDITIONAL INFORMATION NEEDED TO COMPLETE FORM

Sometimes you cannot complete the electronic loan form in one sitting. For example, you may need a parent to co-sign a loan for their child. This cosigner may not even want to come to the same branch where the loan was originated. ProDOC has an easy-to-use Pending option that allows for just this type of situation.

In this case, instead of clicking the *Save* button, you would click the *Pending* button. Clicking this option saves the loan form in a temporary location so that it can be accessed at a later date for future editing.

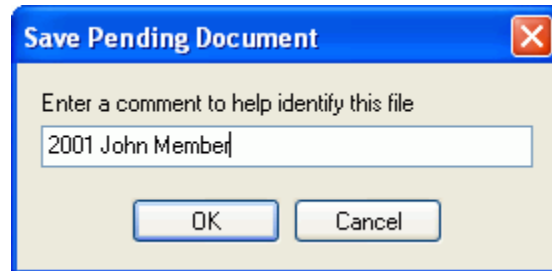
- **NOTE:** The Pending option locks any fields containing data. If a member has already entered a signature or initials in a field, you will not be able to change the information once the Pending option is used. At this point you will only be able to gather signatures and initials for empty fields (fields without data).

Button Bar of ProDOC - Pending



A dialog box will appear, allowing you to label the eLoan Form so that it is easy to identify at a later date. In the example below, the member's account number and name were included.

Identifying the Form for the Pending Folder

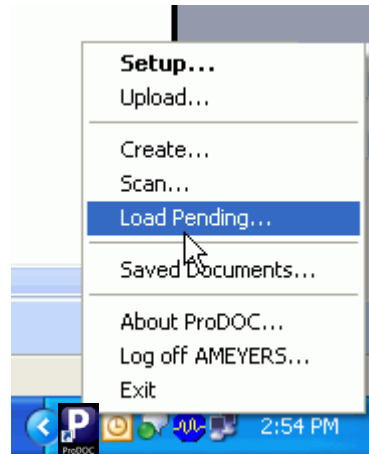


- Comments are lost if you load the document back from pending and wish to save it back to pending.

Click *OK*, and the form disappears from the screen.

When the parent, in this example, comes to the branch of his or her choice, the loan officer simply right clicks on the ProDOC icon in the Task Bar and chooses Load Pending.

Selecting the Pending Folder



The Pending folder will open allowing you to select the desired eLoan Form. This folder will list all the pending loan forms for the credit union. Some credit unions choose to have sub-folders by branch. Simply select the form and click the *Load* button.

The Pending Folder Selections

Form	Created On	Created By	Comment	Index...
EAP1	2012-02-15 07:10:24	SCOTTP_CUA860	SCOTTP_CUA860 02/15/2012 07:10	25397
EAP1	2012-02-15 07:12:14	SCOTTP_CUA860	SCOTTP_CUA860 02/15/2012 07:12	25397
EAP1	2012-02-15 08:21:20	SCOTTP_CUA860	SCOTTP_CUA860 02/15/2012 07:02	5883
EAPP	2012-02-01 10:37:20	JBEAUCHAMP	JBEAUCHAMP 02/01/2012 10:37	6738
EAPP	2012-02-17 11:28:00	JBEAUCHAMP	JBEAUCHAMP 02/17/2012 11:27	4174
EAP1	2012-02-14 15:44:06	SCOTTP_CUA860	SCOTTP_CUA860 02/14/2012 15:43	6767
EL0W	2012-04-24 10:27:26	MIKEG_CUA0860	1970 beth	1970
EAP1	2012-02-15 07:08:48	SCOTTP_CUA860	SCOTTP_CUA860 02/15/2012 07:08	25397
EAP1	2012-02-15 06:59:56	SCOTTP_CUA860	SCOTTP_CUA860 02/15/2012 06:59	5778
EAPP	2012-01-19 11:03:54	JBEAUCHAMP	JBEAUCHAMP 01/19/2012 11:02	6738

At the bottom of the window, there are four buttons: a green circular refresh icon, a 'Load' button, a 'Delete' button, and a 'Close' button with a red cross icon.

The eLoan form will open allowing you to collect the additional information. Collect the additional needed signatures. (Signatures collected prior to saving the electronic loan form in the Pending folder cannot be changed at this time.)

Collecting Final Signatures

Simply click the *Print* button to print the loan and then *Save* button to archive the loan to complete the process.