

Automatically fill out the "Prepared-By" type fields in a form

Lender's Office offers over 50 standard application, disclosure, and request forms for you to process and print. For your convenience, Lender's Office automatically populates many of the prepared-by/contact information form fields with the information found in the loan file's Official Contact List.

OFFICIAL CONTACT LIST FOR THIS LOAN						
<input type="button" value="Add People..."/>		<input type="button" value="Delete checked"/>				
Select	Type	Agent Name	Company Name	Phone	Email	
<input type="checkbox"/>	Underwriter	Ulysses Underwriter	Underwriter Company Name	(111) 111-1111	ulysses@underwriter.com	edit
<input type="checkbox"/>	Lender	Lenny Lenders	Lender Company Name	(222) 222-2222	lenny@lenders.com	edit
<input type="checkbox"/>	Processor	Pablo Processor	Processor Company Name	(333) 333-3333	pablo@processor.com	edit
<input type="checkbox"/>	Manager	Manny Manager	Manager Company Name	(444) 444-4444	manny@manager.com	edit
<input type="checkbox"/>	Loan Officer	Joan Loan	Loan Officer Company Name	(555) 555-5555	joan@loan.com	edit

The lists below reflect the forms that are linked to the Official Contact List records.

Forms affected by the *Official Appraiser* :

- FHA Request for Insurance Endorsement (HUD-54111)
- FHA DE Analysis Appraisal Report (HUD-54114)
- Request For Appraisal
- Uniform Loan Submission Sheet
- Uniform Underwriting and Transmittal Summary (1008)

Forms affected by the *Official ECOA* :

- Equal Credit Opportunity Act

Forms affected by the *Official Homeowner Insurance* :

- Request For Insurance

Forms affected by the *Official Escrow* :

- Request For Appraisal
- Uniform Loan Submission Sheet

Forms affected by the *Official Lender* :

- California Mortgage Loan Disclosure Statement (MLDS)
- Certification of Loan Disbursement (VA 26-1820)
- FHA Addendum (Sponsor section – Line 16)
- FHA HUD Appraised Value Disclosure
- VA Addendum (Sponsor section – Line 16)
- VA Verification of Benefit (VA 26-8937)
- Uniform Loan Submission Sheet

Forms affected by the *Official Listing Agent* :

- Request For Appraisal

Forms affected by the *Official Loan Officer* :

- Borrower Authorization
- Borrower Certification & Authorization
- California Impound Statement
- California Real Estate Agency Disclosure
- Credit Score Information Disclosure
- Statement of Credit Denial, Termination, or Change
- Equal Credit Opportunity Act
- Federal Truth-In-Lending Disclosure Statement (TIL)
- FHA Addendum (Lender section – Line 15)
- Flood Hazard Notice
- Georgia Disclosure
- Good Faith Estimate (GFE)
- Lock-in Confirmation
- Mortgage Brokerage Business Contract (Florida Only)
- Mortgage Loan Commitment
- Mortgage Loan Origination Agreement
- Privacy Policy Disclosure
- Right to Receive Copy of Appraisal Report
- Servicing Disclosure Statement
- Statement of Appraised Value (HUD-92800.5B)
- Texas Mortgage Broker/Loan Officer Disclosure
- Texas Disclosure of Multiple Roles
- Uniform Loan Submission Sheet
- Uniform Residential Loan Application (1003 – Interviewer section)¹
- VA Addendum (Lender section – Line 15)

¹ Only Applicable when using the **Populate from Official Contact** option.

Forms affected by the *Official Mortgagee* :

- Request For Insurance
- Request For Title Commitment

Forms affected by the *Official Processor* :

- Request For Appraisal
- Request For Insurance
- Request For Title Commitment
- Verification of Deposit (VOD)
- Verification of Employment (VOE)
- Verification of Loan (VOL)
- Verification of Land Contract
- Verification of Mortgage (VOM)
- Verification of Rent (VOR)

Forms affected by the *Official Seller* :

- Request For Title Commitment
- Survey Request

Forms affected by the *Official Selling Agent* :

- Request For Appraisal

Forms affected by the *Official Title* :

- Request For Title Commitment
- Survey Request
- Uniform Loan Submission Sheet

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Notes:

All of the prepared-by/contact fields in the forms above may be manually modified. Any prepared-by/contact form field that has been manually changed will no longer be linked to the loan file's Official Contact List and will not be updated with the corresponding Official Contact List records.

Another way to populate the information inside a single Official Contact record to the appropriate forms is by selecting the "Copy to Prepared-By Fields for Appropriate Forms Upon Save" check box (located just below the "Notes" box) and then saving the record.