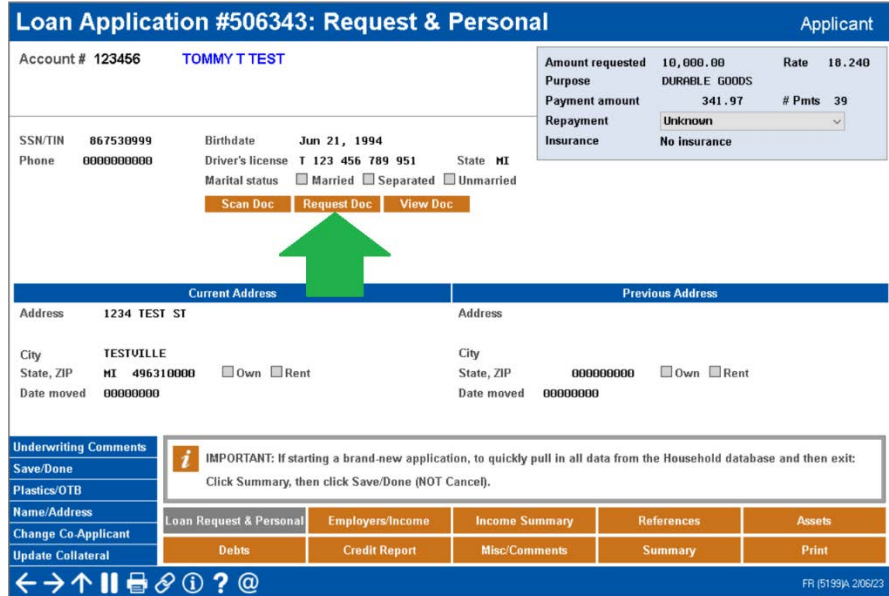


How to use Request a Document from CU* BASE

1. User selects “Request Doc” on the “Loan Request & Personal” screen. It will proceed with the member or co-applicant’s information based on who is represented on the screen when clicked.
 - a. These buttons are also on the “Employers/Income” screen.



Loan Application #506343: Request & Personal Applicant

Account # 123456 **TOMMY T TEST**

Amount requested	10,000.00	Rate	18.240
Purpose	DURABLE GOODS		
Payment amount	341.97	# Pmts	39
Repayment	Unknown		
Insurance	No insurance		

SSN/TIN 867530999 Birthdate Jun 21, 1994
 Phone 000000000 Driver's license T 123 456 789 951 State MI
 Marital status Married Separated Unmarried

[Scan Doc](#) [Request Doc](#) [View Doc](#)



Current Address		Previous Address	
Address	1234 TEST ST	Address	
City	TESTVILLE	City	
State, ZIP	MI 496310000 <input type="checkbox"/> Own <input type="checkbox"/> Rent	State, ZIP	000000000 <input type="checkbox"/> Own <input type="checkbox"/> Rent
Date moved	00000000	Date moved	00000000

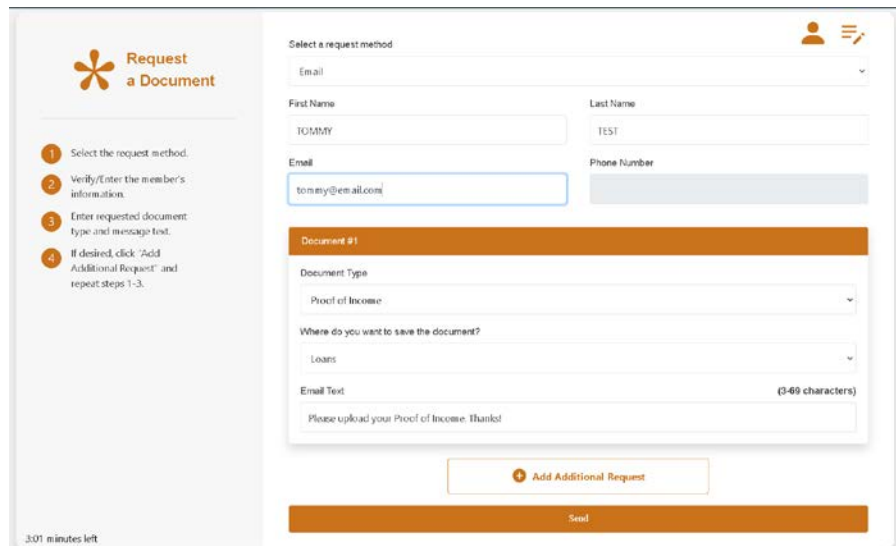
Underwriting Comments
 Save/Done
 Plastics/OTB
 Name/Address
 Change Co-Applicant
 Update Collateral

IMPORTANT: If starting a brand-new application, to quickly pull in all data from the Household database and then exit: Click Summary, then click Save/Done (NOT Cancel).

Loan Request & Personal	Employers/Income	Income Summary	References	Assets
Debits	Credit Report	Misc/Comments	Summary	Print

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2. User is displayed the “Request a Document” website where they can send the member a request to upload documents back to the credit union.
 - a. Name and email will automatically fill if information is available in CU*BASE
 - b. When selecting “Online Banking” as the request method, it will send to the account number displayed in 
 - c. Multiple requests can be made at the same type by selecting “Add Additional Request”
 - d. Archived documents will be indexed using the information in 



Request a Document

- 1 Select the request method.
- 2 Verify/Enter the member's information.
- 3 Enter requested document type and message text.
- 4 If desired, click "Add Additional Request" and repeat steps 1-3.

3:01 minutes left

Select a request method

Email

First Name Last Name

Email Phone Number

Document #1


Document Type

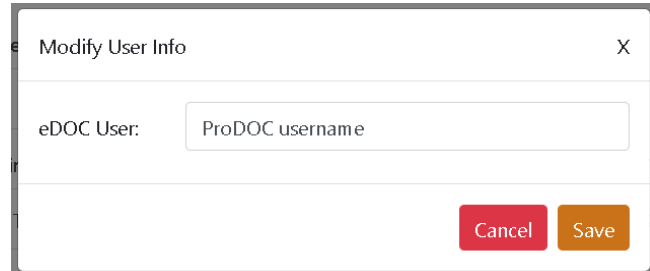
Where do you want to save the document?

Email Text (3-69 characters)

[Add Additional Request](#)

[Send](#)

3. Clients with Inhouse Imaging Servers using will need to specify their eDOCSignature username information to correctly associate their users with the eSign package.
 - a. Click on  and type your ProDOC username.
 - i. If using active directory, this could possibly be your windows username.



Modify User Info X

eDOC User: ProDOC username

Cancel Save