Debt Protection Election Wizard

Select one of the following:
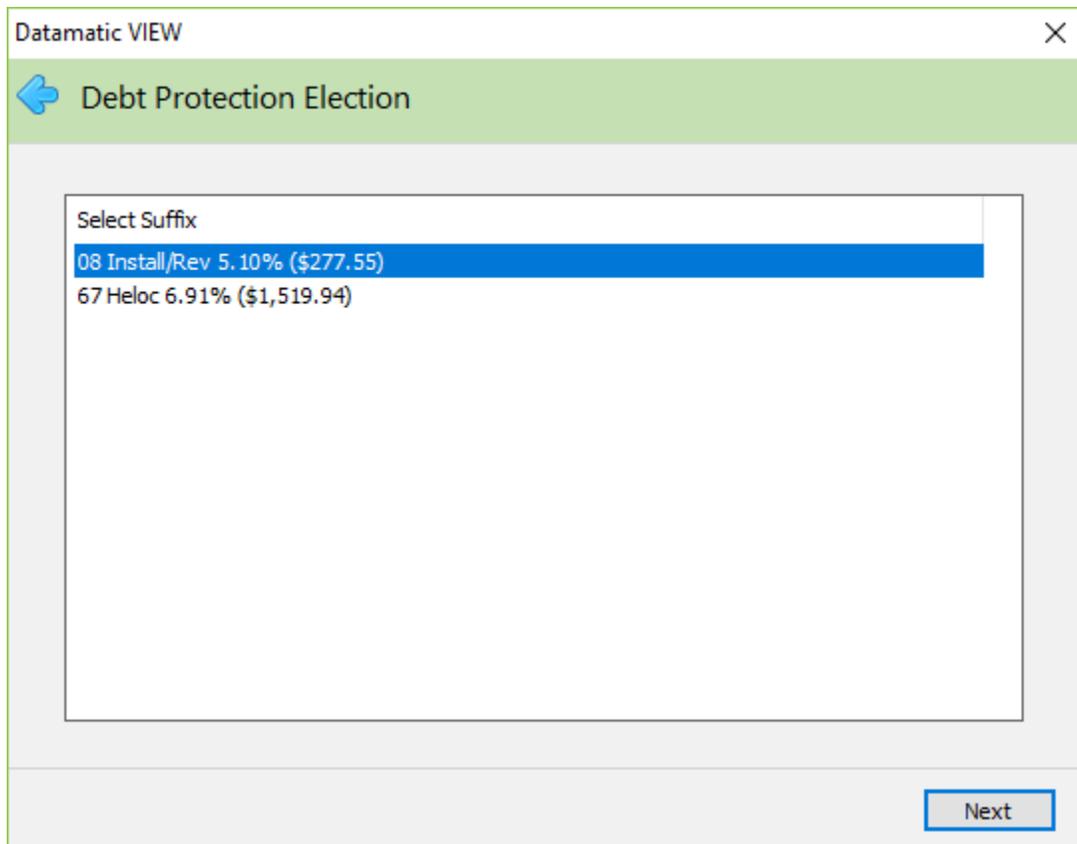- [Member Ribbon > Lending > Debt Protection Election].
- Alt + L > Debt Protection Election.

The Debt Protection Election Wizard is displayed. The Debt Protection Election Wizard will help you process a debt protection form with subsequent election information quickly and easily. Continue to the next window.

Prior to printing a Debt Protection Election document, the PDF must be setup in PDFs. See PDFs in the System Settings Manual.

The Debt Protection Election Wizard is used to enter the information to be used to print the Debt Protection Election form only. Any changes that need to be made to the loan will need to be done with file maintenance.
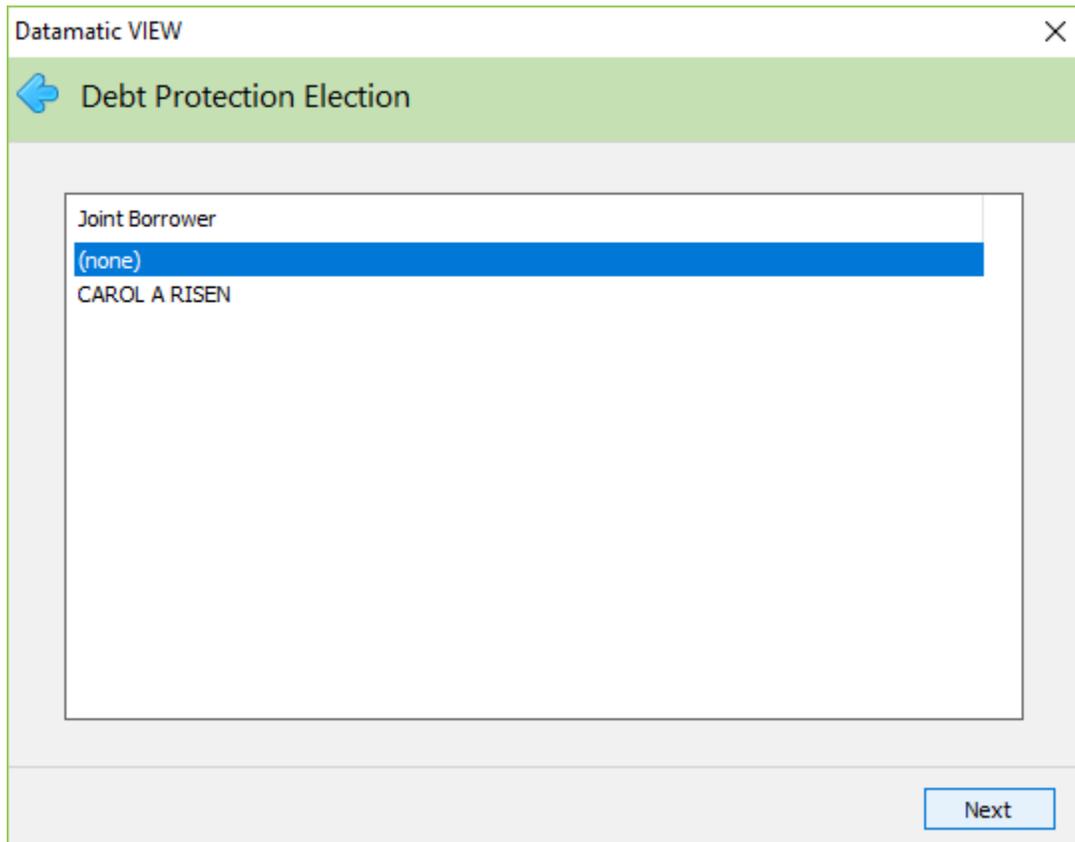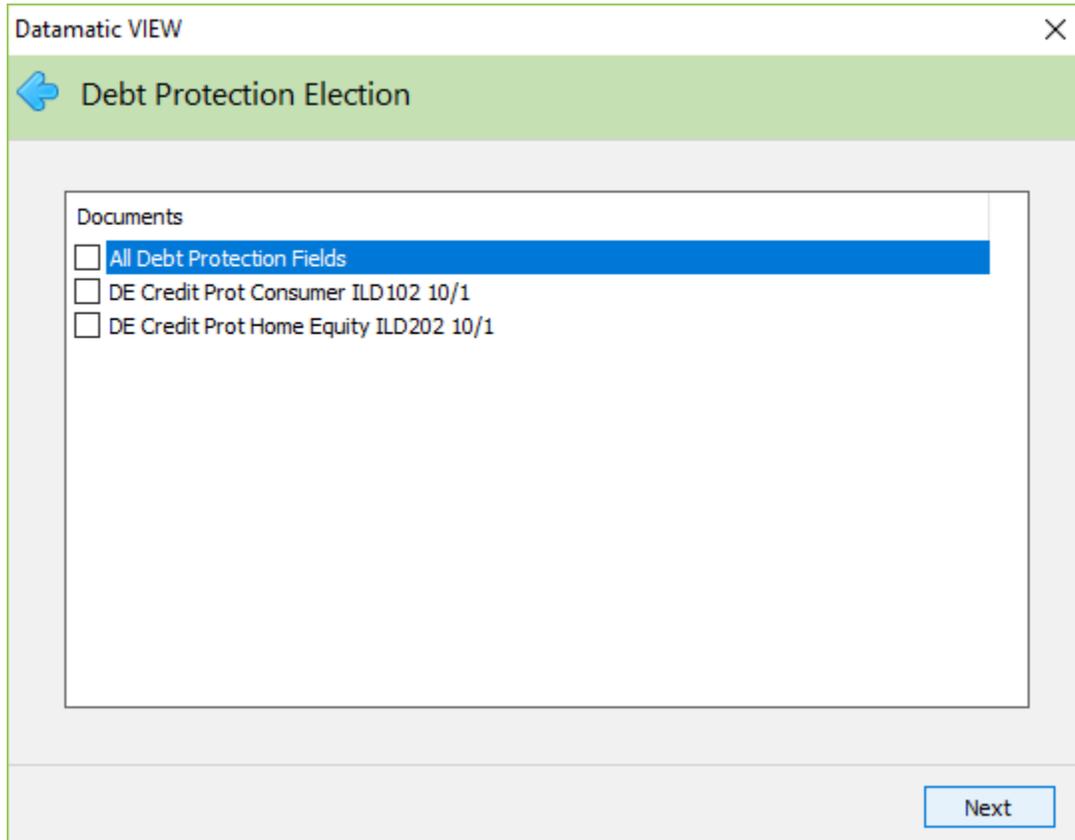

The system displays.

Select the loan suffix to which the action will apply. If the account number is not known, click on the magnifying glass to the right of the Account field to search for the account number.

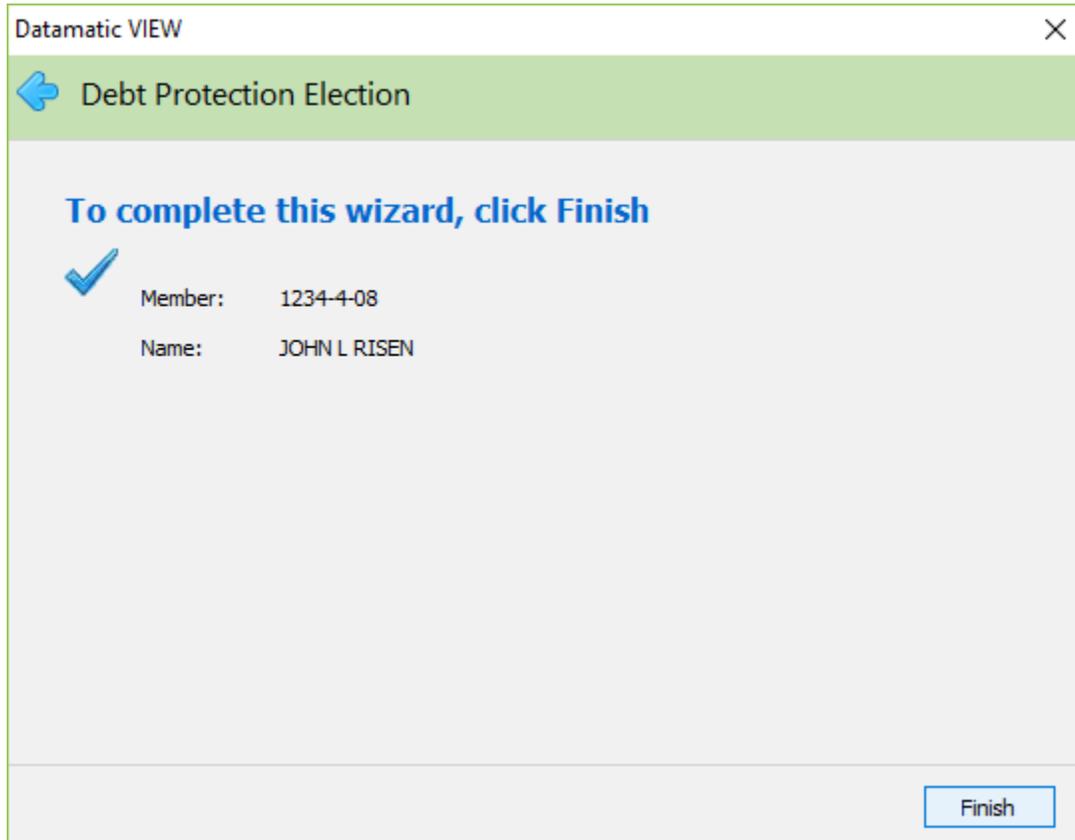Continue to the next window. The system displays.

If applicable, select a secondary name to be included on the document. Continue to the next window.

The system displays.

Select the document to be printed. Continue to the next window.

The system displays.

Select Finish and the PDF will be displayed. The data for the mapped fields will be filled in. Enter any missing information in the blank fields, if applicable. Select the printer icon on the PDF window to print the document, if needed.

If necessary, click on the arrow in the upper left corner of the window to return to any of the previous windows and make changes.