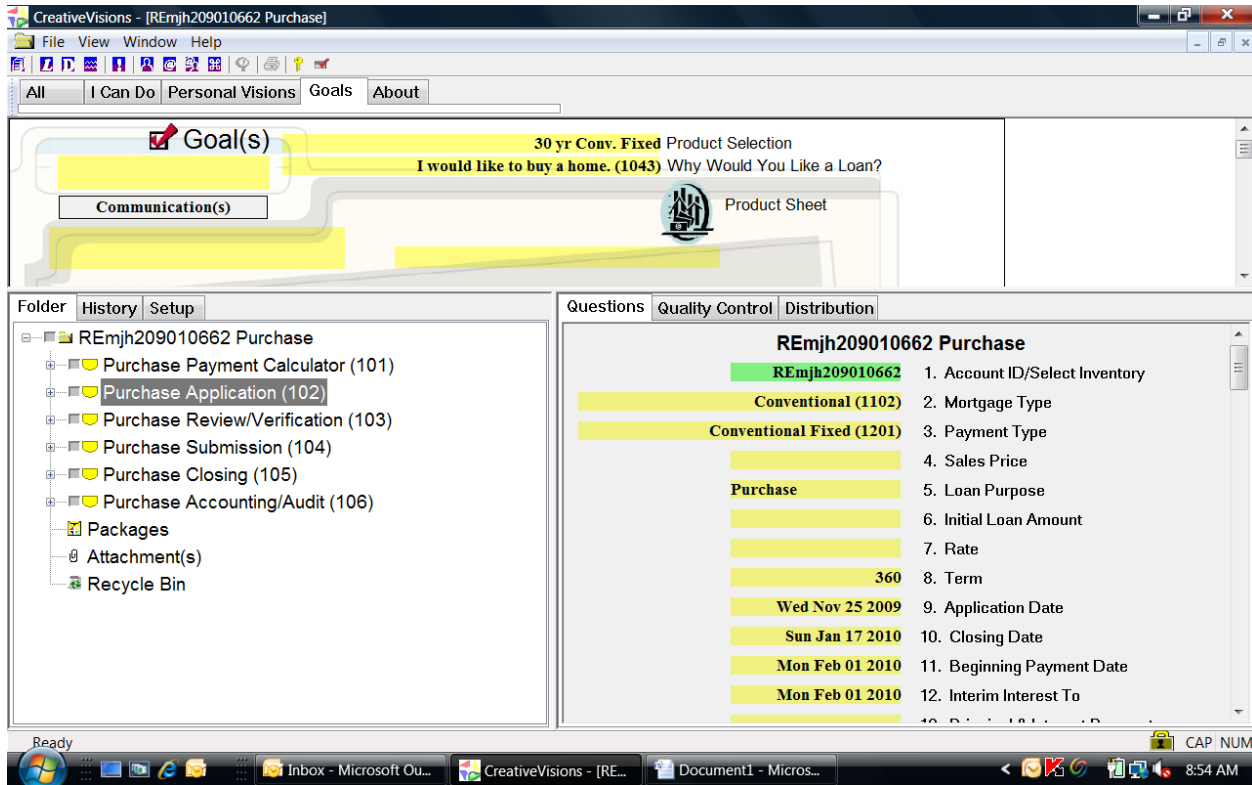
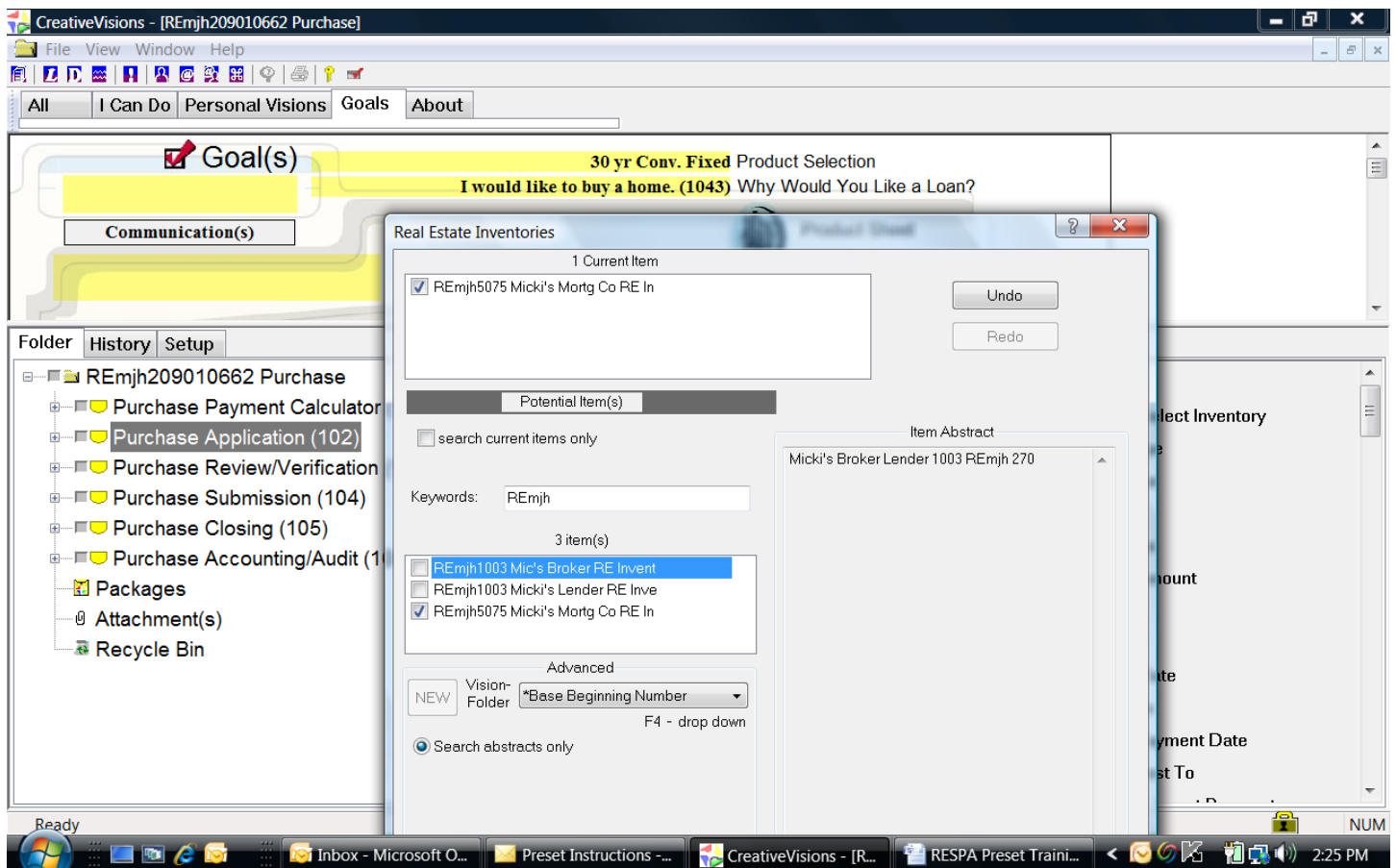


INSTRUCTIONS FOR PRESETTING NEW RESPA DATA -

Create a Test Loan for each type of loan offered, such as Conventional, FHA, VA and USDA.



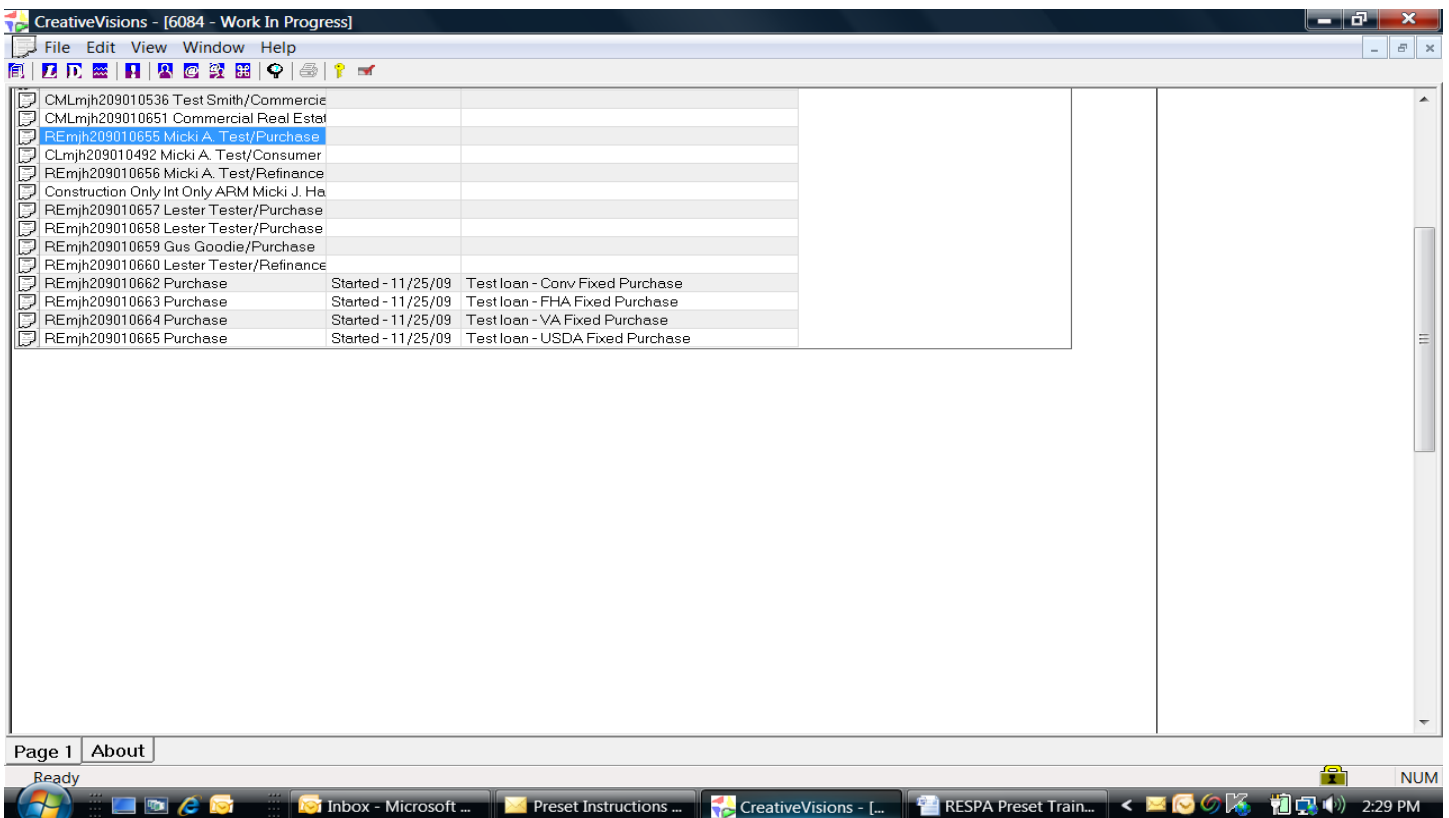
Once a loan is created, select a Training Inventory so an Account ID is assigned to the loan.



After you exit the Test Loan, it can be accessed again by entering on the 'Loans' icon and searching by the Account Number. Or, the file can also be found from 'My Files'.

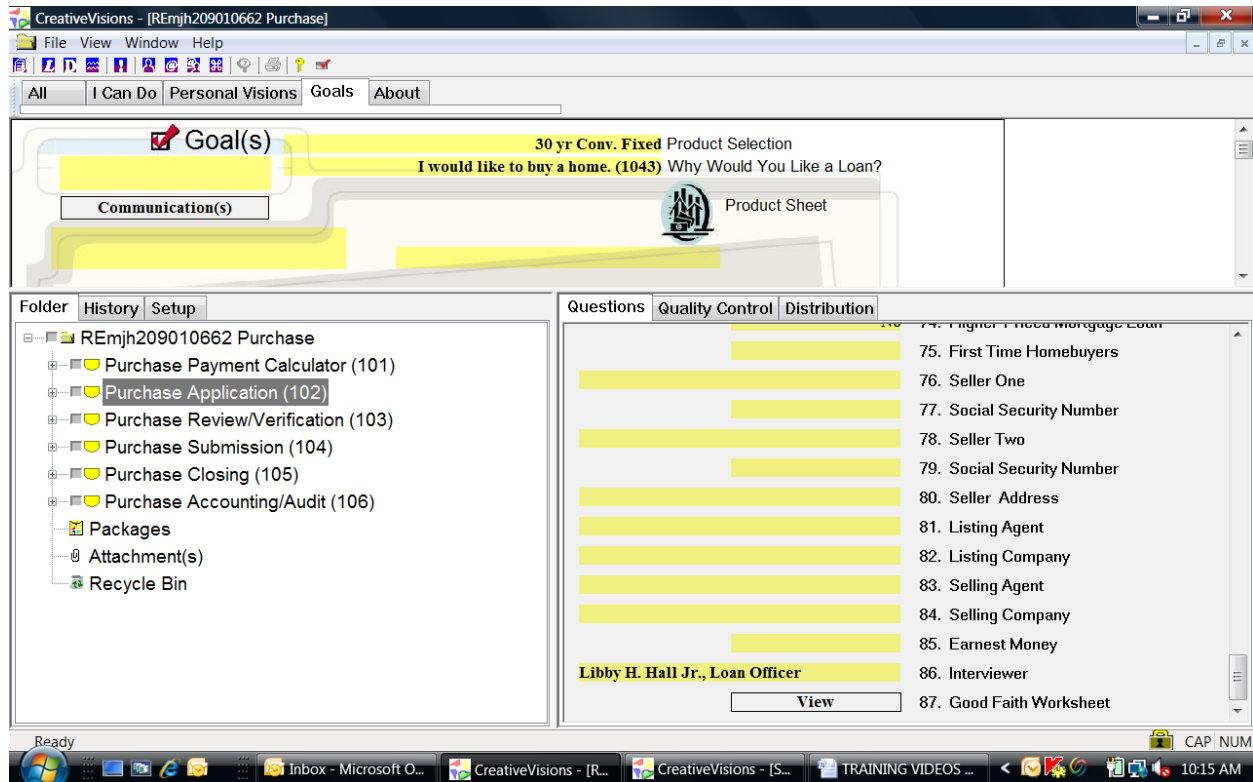


All loans created by you will be listed at the bottom of the loans located in 'My Files'. Comments can be entered for each Test Loan to describe the file for future reference.



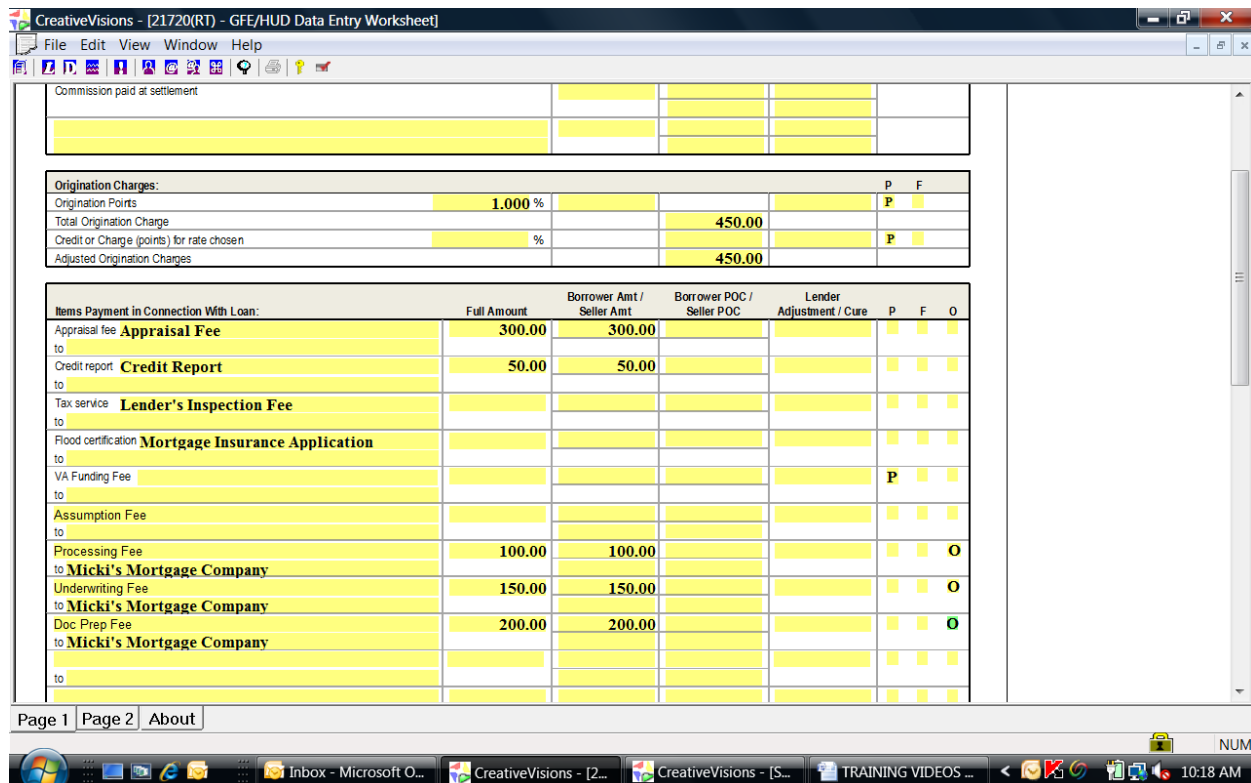
Load the first test loan from 'My Files' by double clicking on the Loan Number or Borrower Name.

Highlight the Application Stage to access the Application Stage questions and use the scroll bar to go to the bottom of the list of questions to locate the 'View' button for access to the new Good Faith Worksheet.



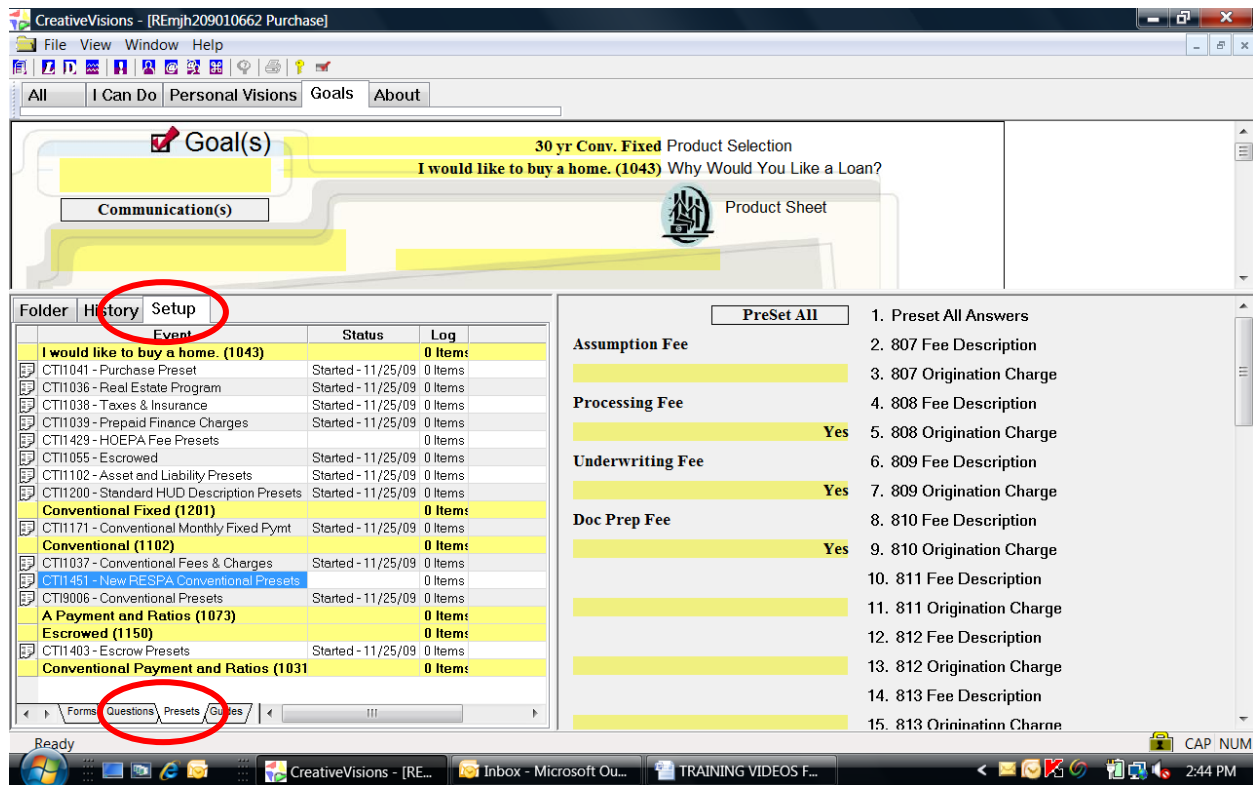
Enter on the 'View' button to load the Worksheet. The Worksheet will reflect the fees which are currently preset for this product. Edit the fees and their descriptions as needed so the answers in this Test Loan will be available for presetting.

Preset changes will not be utilized until your firm has started to use the new Good Faith and HUD Settlement Statement.

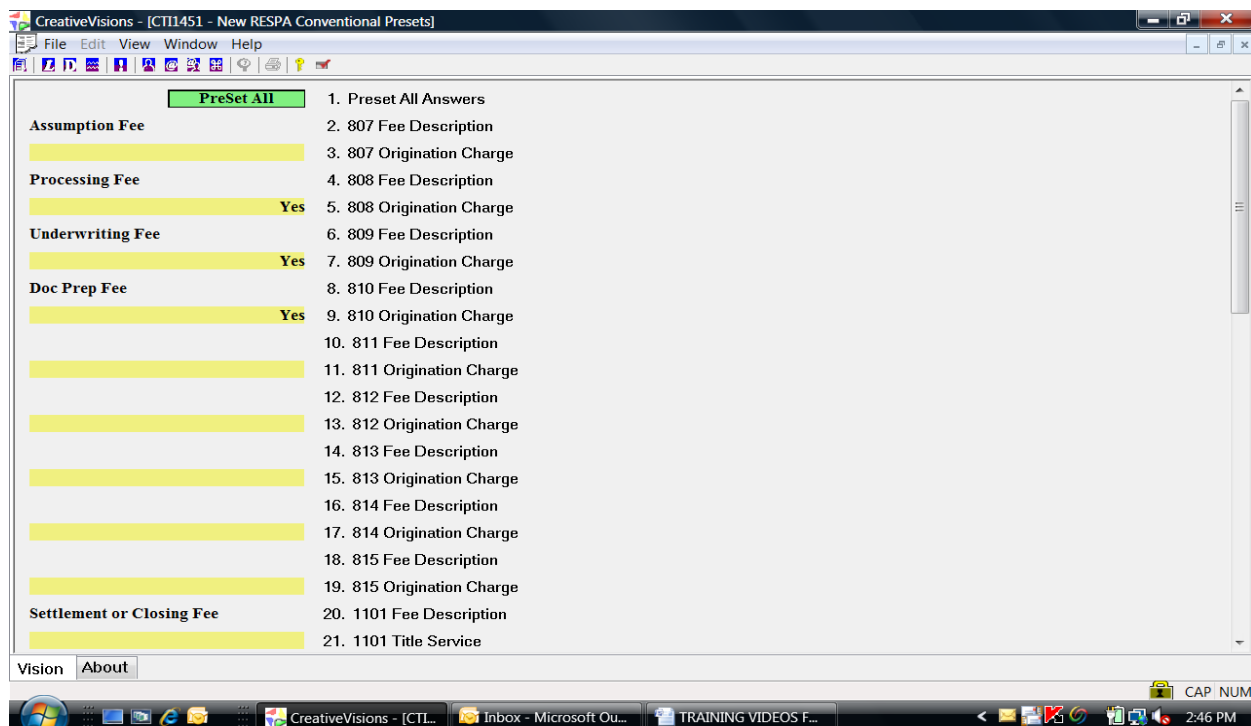


From the Goals page in the Test Loan, click on the Set-Up tab, followed by the Presets tab to load the list of preset visions. This view will display all of your existing preset visions. A new RESPA preset vision has been provided for each type of loan. The example below shows the new RESPA Conventional Presets vision. This preset vision provides presets to allow you to preset fees as an Origination Charge, Title Service or as Itemized.

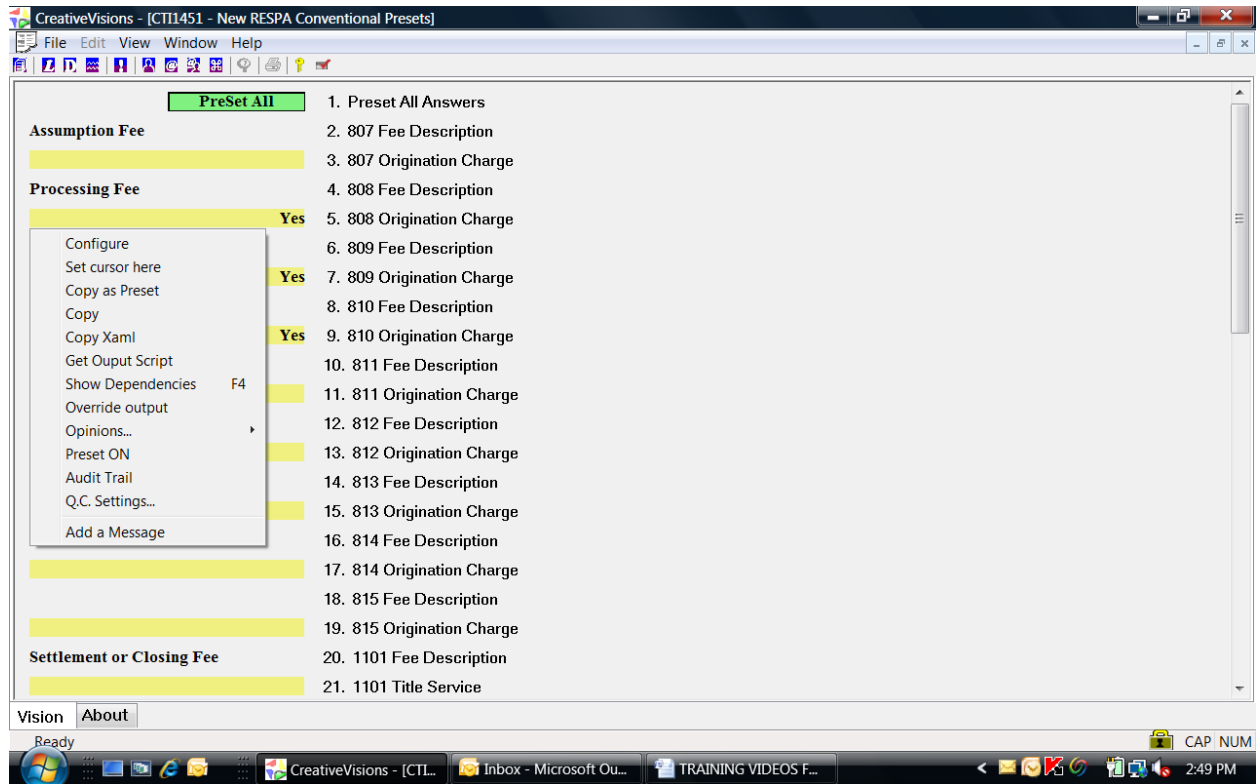
Preset changes will not be utilized until your firm has started to use the new Good Faith Estimate and HUD Settlement Statement.



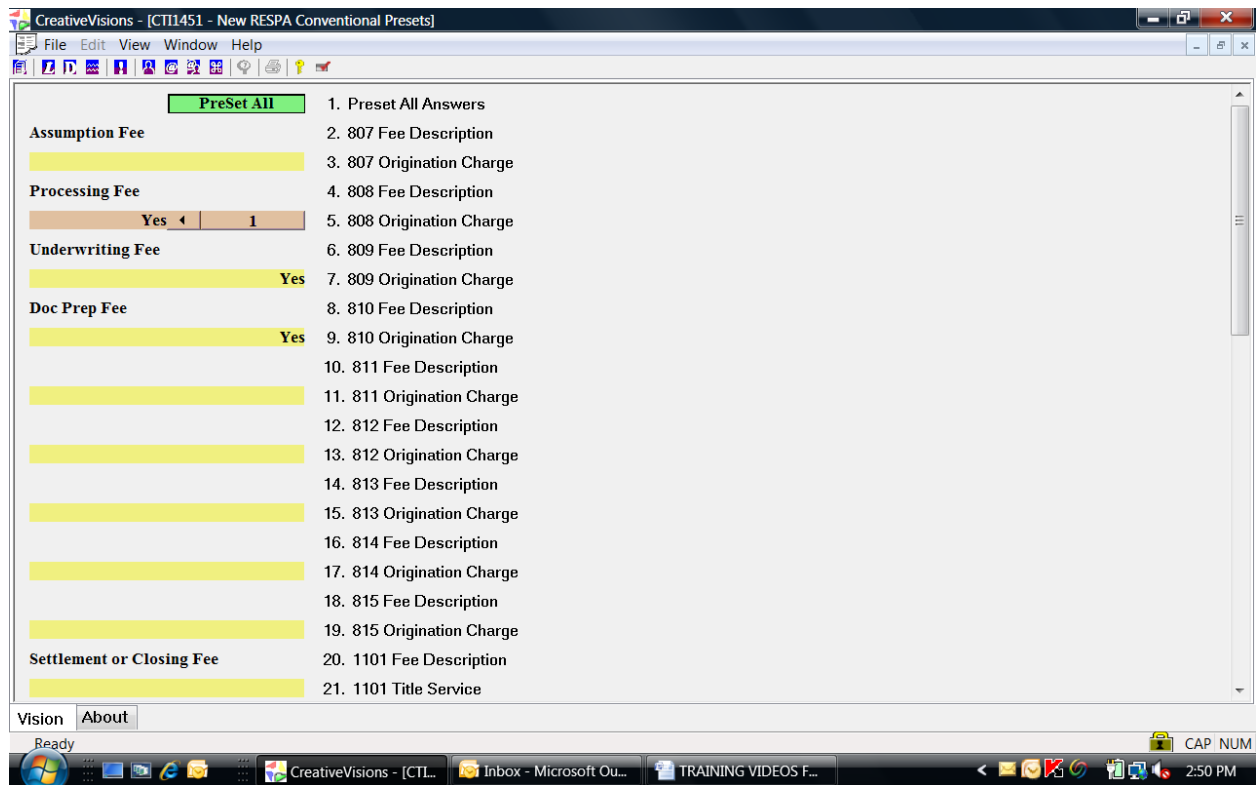
Load the preset vision full screen by double clicking on the icon to the left of the vision number. The example below shows CTI1451 – New RESPA Conventional Presets.



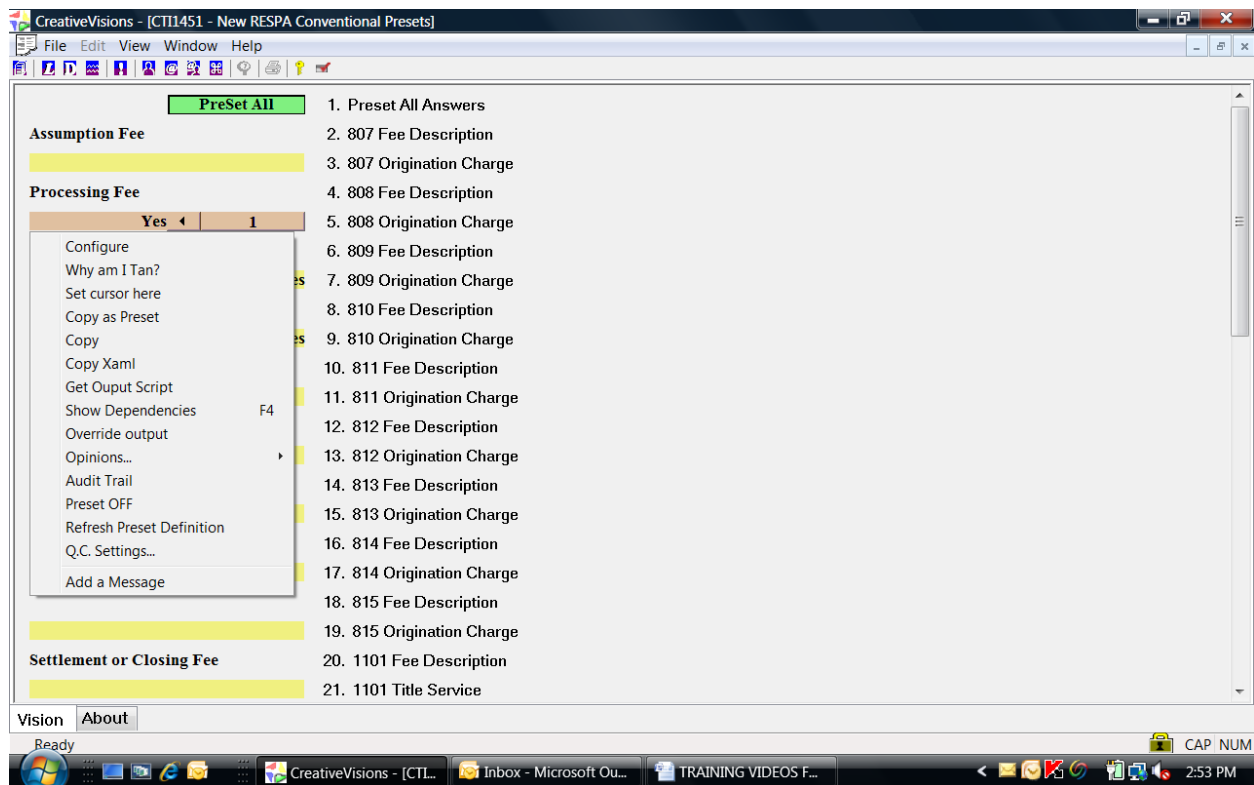
To turn a preset on, position your cursor on the control which displays the answer you would like to preset. Right click on the control to display a list of choices, then click on 'Preset ON' to set the preset.



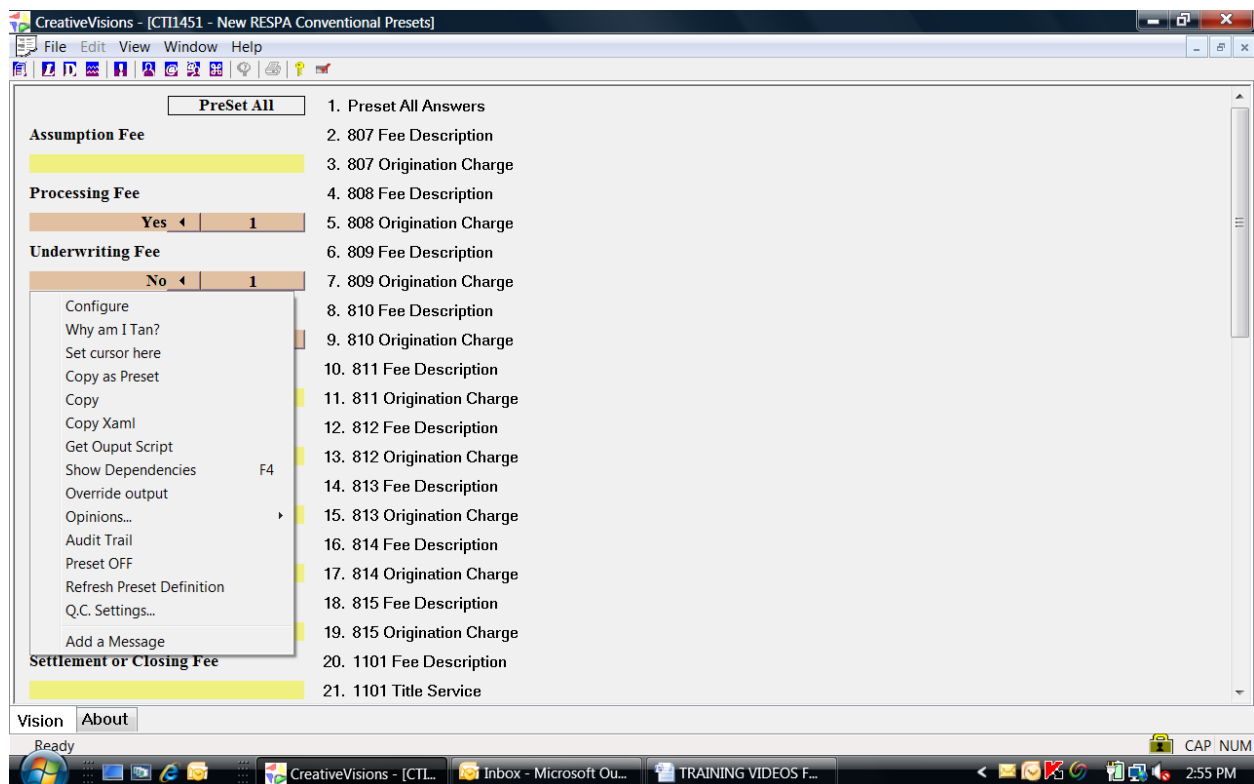
The preset displays as a preset bar with the answer, and an arrow points left to the answer in your Test Loan.



To turn a preset off, right click on a control to display a list of choices, then click on 'Preset OFF' to turn the preset off.



To change a preset answer to a different answer, click on the field to the left of the arrow to change the answer of the question in your loan. After tabbing to the next question, right click on the control to see the list of choices and click on 'Refresh Preset Definition'.



The preset answer will be refreshed to the new answer.

CreativeVisions - [CTI1451 - New RESPA Conventional Presets]

File Edit View Window Help

PreSet All

Assumption Fee		1. Preset All Answers
		2. 807 Fee Description
		3. 807 Origination Charge
Processing Fee		4. 808 Fee Description
Yes <input type="checkbox"/>	1	5. 808 Origination Charge
Underwriting Fee		6. 809 Fee Description
No <input type="checkbox"/>	0	7. 809 Origination Charge
Doc Prep Fee		8. 810 Fee Description
Yes <input type="checkbox"/>	1	9. 810 Origination Charge
		10. 811 Fee Description
		11. 811 Origination Charge
		12. 812 Fee Description
		13. 812 Origination Charge
		14. 813 Fee Description
		15. 813 Origination Charge
		16. 814 Fee Description
		17. 814 Origination Charge
		18. 815 Fee Description
		19. 815 Origination Charge
Settlement or Closing Fee		20. 1101 Fee Description
		21. 1101 Title Service

Vision About

Ready

CreativeVisions - [CTL... Inbox - Microsoft Ou... TRAINING VIDEOS f... CAP NUM

2:57 PM