

Create a case guide



My Home

Welcome Biju, have you seen our latest news...

A new case must be created first, even to generate a KFI.

These are the last 10 cases you have worked on. If the case you require is here, select the appropriate 'Action' or 'Search for a case'.

Case Id	Created On	Status	Applicant(s)	Intermediary	Action
M650108863	07-03-2018	Application Submitted	Attfield L; Khan S;	Chacko, Biju	Open
M650108726	07-03-2018	Closed	Attfield L; Khan S;	Chacko, Biju	Open
M650108828	07-03-2018	Application Submitted	Coghlan S;	Chacko, Biju	Open
M650108624	06-03-2018	DIP	Collins S; Collins A;	Chacko, Biju	Open Cancel
M650108892	07-03-2018	Application Submitted	Dickey K; Dickey L;	Chacko, Biju	Open
M650108837	07-03-2018	DIP	Howard T;	Chacko, Biju	Open Cancel
M650108761	07-03-2018	Application Submitted	Kearney J; Kearney J;	Chacko, Biju	Open
M650108742	07-03-2018	Uploading	Mdteesthree S;	Chacko, Biju	Open
M650108871	07-03-2018	Application Submitted	Milne I; Henthorn K;	Chacko, Biju	Open
M650108757	07-03-2018	Case Created	Milne I; Henthorn K;	Chacko, Biju	Open Cancel

- 1 In NFI Online you need to 'Create a case' to do anything, even just to get a Key Facts Illustration (KFI).

To create a new case to get a KFI or Decision in Principle (DIP), click 'Create new case'.

System Information

Supported Lending Types

Ownership type	New purchase	Remortgage
Rate Switch		
Full purchase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Full purchase with porting	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Remortgage unencumbered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Shared ownership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Right to buy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Second property	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equity share	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Genuine Bargain Price	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Restricted Resale Price	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Please note

- This system will currently accept submissions for the lending types shown
- Any other lending type will not be accepted
- All fields are mandatory where they are relevant to the applicant
- Use only accept payments of fees by Visa and Mastercard
- All mortgage repayments must be paid by direct debit
- All applications must be on an advised basis

Before you proceed, please confirm

- There are no more than 2 applicants
- There are no foreign addresses
- None of the applicants are Nationwide employees or Nationwide pensioners
- No applicants are self-employed abroad
- This application is not for a Buy to Let property
- The security address is not on the Isle of Man, Scilly Isles or the Channel Islands
- None of the applicants are intending to use any income which is received in a foreign currency to support their mortgage application
- All or all applicants be resident in the UK for tax purposes when the mortgage has completed

I confirm that all of the above statements apply

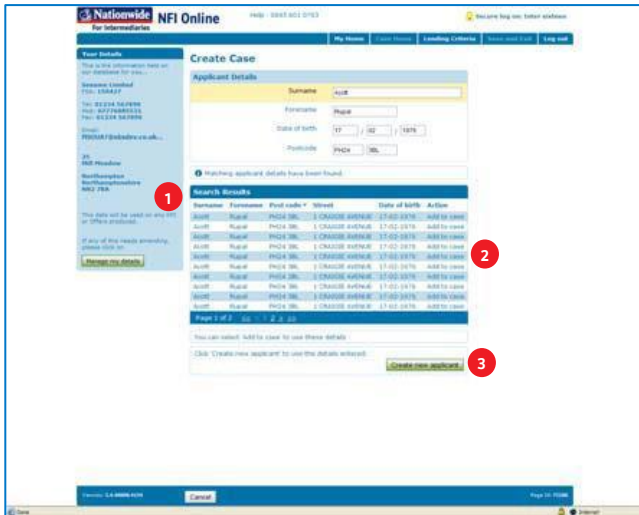
- 1 You'll be taken to the 'System information' page that advises you what type of applications you can submit via this system.
- 2 Tick the box to confirm that none of our exclusion statements apply (you cannot use this system for any of these cases).
- 3 Click 'Continue'.

For any other applications, click 'Cancel' and refer to the NFI information website for guidance on how to submit the case. (www.nationwide-intermediary.co.uk)

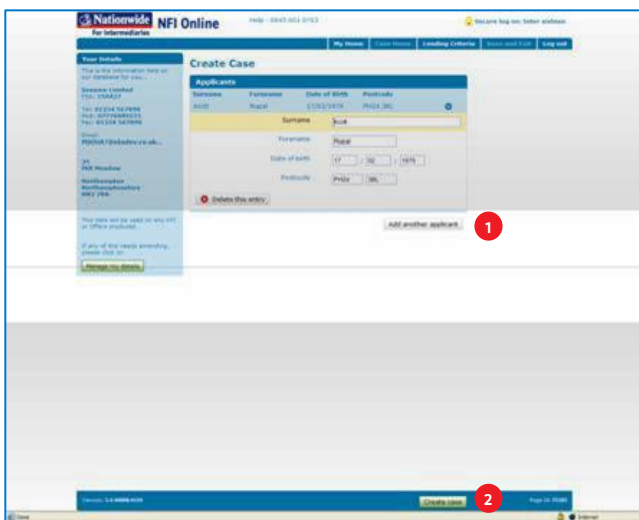
- 1 Select the channel you wish to use for this case.
- 2 Select from the options displayed, or choose 'other' and enter the telephone number you want us to use to contact you specifically for this case.
- 3 Ensure your client(s) have read and agreed to the 'How Nationwide use your information' document and tick the box to confirm.
- 4 Select 'yes' if your client is an existing Nationwide Borrower.
- 5 You will then be asked if your client is considering a rate switch. Select 'no' for the purpose of this guide.
- 6 Click 'Continue'.

- 1 Tick the box to confirm the customer consents to their personal information being accessed.
- 2 Click 'Continue'.

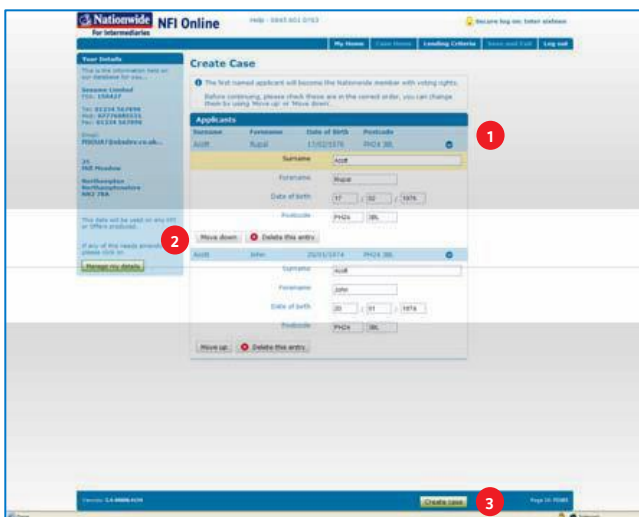
- 1 Now enter the applicant's basic details:
 - Surname
 - Forename
 - Date of birth
 - Postcode
- 2 Click 'Continue'.



- 1 NFI Online will automatically search to see if you have placed a case with us for this client before. Any matches will be displayed in the 'Search Results'.
- 2 You can choose to select 'Add to case' to use these details, which will be copied to the new case, to save you entering it all again, and any updates to the data can be made.
- 3 If you do not want to use any previous applicant's details, click 'Create new applicant'.



- 1 You'll then be asked if there is a second applicant. If there is another applicant, click 'Add another applicant'.
- 2 If there isn't another applicant, click 'Create Case'.



- 1 If you clicked 'Add another applicant' and entered the second applicant's details, you'll see a summary showing both sets of details.
- 2 Check that they are in the correct order, as only the first applicant will become the Nationwide member with voting rights. You can swap them around if needed at this stage by clicking on 'Move down' or 'Move up'.
- 3 When you are happy with the order, click 'Create case'.