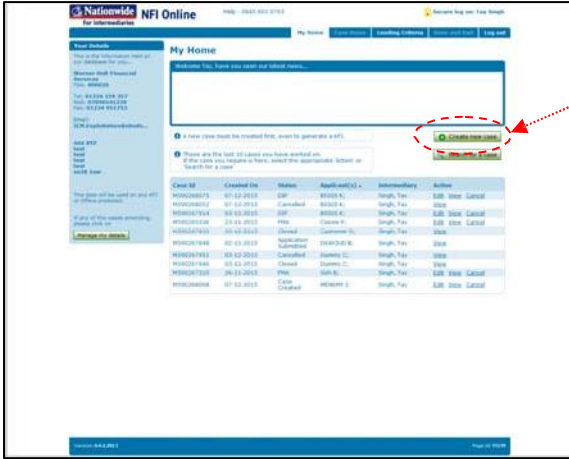
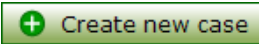
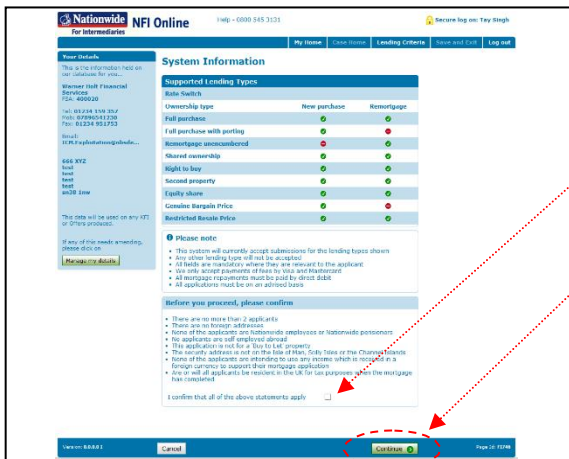


In NFI Online you need to 'Create a case' to do anything, even just to get a Key Facts Illustration (KFI).



To create a new case to get a KFI or Decision in Principle (DIP)

Click 

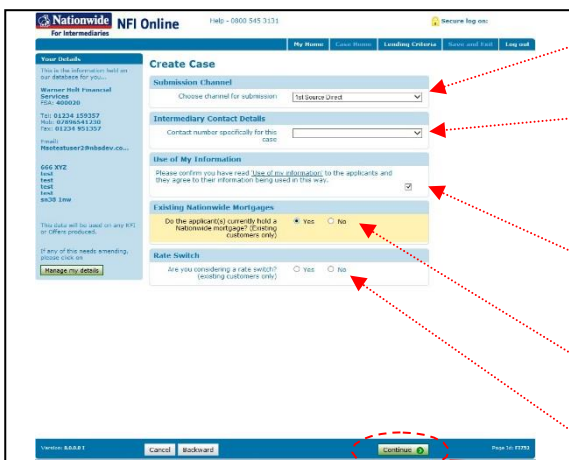


You will be taken to the 'System information' page that advises you what type of applications you can submit via this system.

Tick the box to confirm that none of our exclusion statements apply (you cannot use this process for any of these cases).

Click 

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



Select the channel you wish to use for this case.

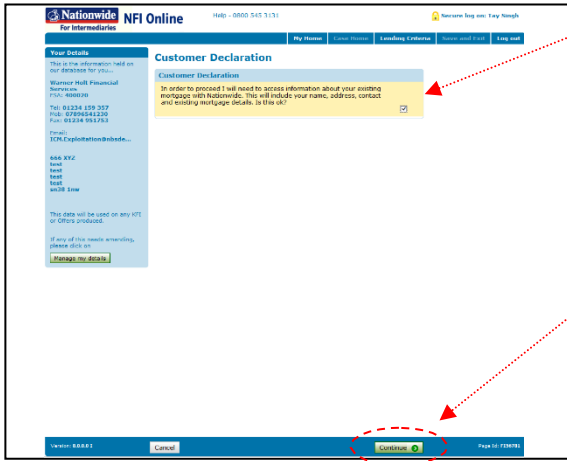
Select from the options displayed, or choose 'other' and enter the telephone number you want us to use to contact you specifically for this case.

Ensure your client(s) have read and agreed to the 'Use of My Information' and tick the box to confirm.

Select 'yes' if your client is an existing Nationwide Borrower.

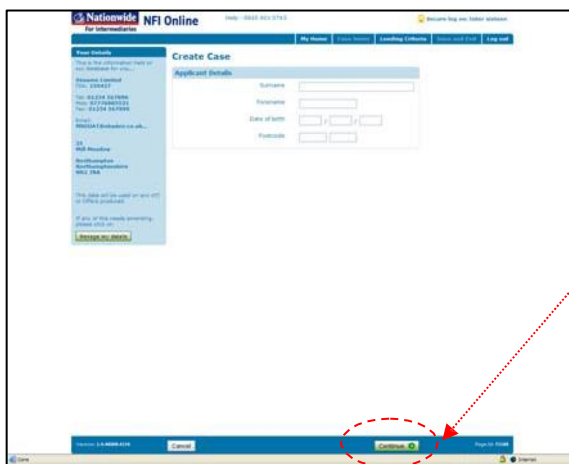
You will then be asked if your client is considering a rate switch. Select 'no' for the purpose of this guide.

Click 



Tick the box to confirm the customer consents to their personal information being accessed.

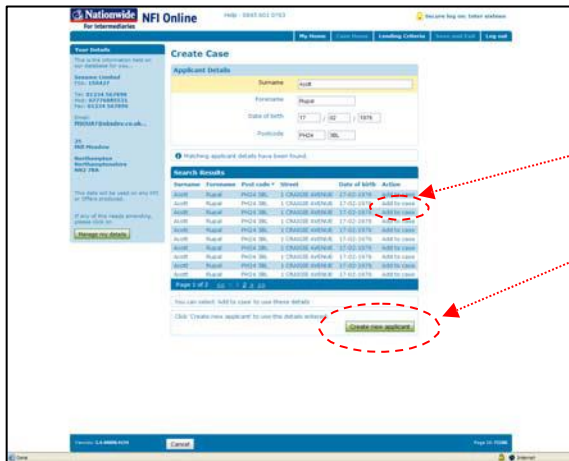
Click 



Now enter the applicant's basic details

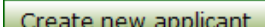
- Surname
- Forename
- Date of Birth
- Postcode

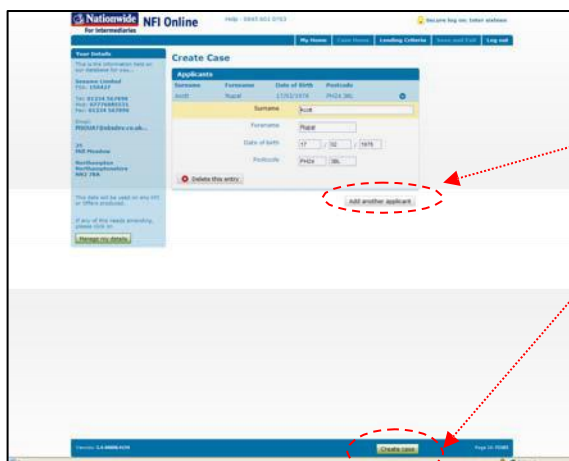
Click 



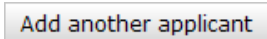
NFI Online will automatically search to see if you have placed a case with us for this client before. Any matches will be displayed in the 'Search Results'.

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.

If you do not want to use any previous applicant's details, Click 



You are then asked if there is a second applicant.

If there is another applicant, click 

If there is not another applicant, click 

Nationwide NFI Online

Create Case

The first named applicant will become the Nationwide member with voting rights.

Before confirming, please check these are in the correct order; you can change them by using 'Move up' or 'Move down'.

Name	Forename	Surname	Date of Birth	Postcode
Alice	Alice	11025316	PH24 3JL	
Bob	Bob	20151014	PH24 3JL	

Buttons: Move down, Delete this entry, Move up, Create case

If you have clicked on 'Add another applicant' and entered the second applicant details, you will then see a summary showing both sets of details.

Check 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'.

When you are happy with the order, click

Create case

