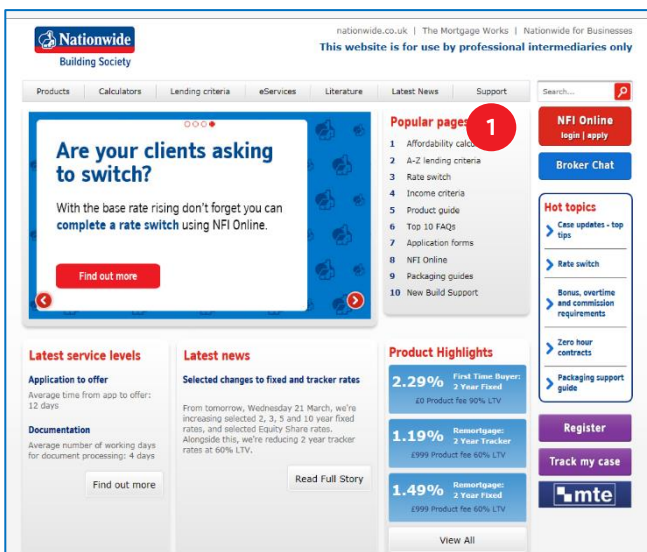


Scan & Attach and Faxing



NFI Online and Nationwide MTE offer the facility to attach a scanned document straight onto the case; eliminating paper and saving the time and effort involved with faxing or posting.

However, if you do not have a scanner, or the document is too big to scan & attach, we also offer an enhanced faxing solution which places the document straight onto the case in seconds.

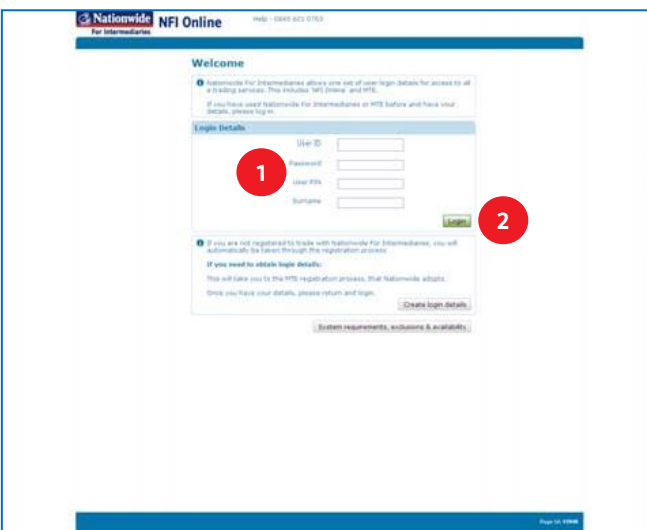


- 1 As an administrator without access to the MTE cases, to 'Scan & Attach' or create a 'Fax Cover Sheet', you can do this via our website platform NFI Online.

To access NFI Online go to:

www.nationwide-intermediary.co.uk

Click 'NFI Online - login/apply'.



- 1 You will need to log in to NFI Online, using your 'Administrator' login details.

Enter:

- User Name
- Password
- User PIN
- Surname

- 2 Then click 'Login'.

Nationwide NFI Online Help - 0800 545 3131 Secure log on: Biju Chacko

For Intermediaries

My Home Case Home Lending Criteria Save and Exit Log out

Your Details
 This is the information held on our database for you...
 Warner Holt Financial Services
 FSA: 400020
 Tel: 01234 159357
 Mob: 07896541230
 Fax: 01234 951357
 Email: Mstestuser2@nbsdev.co...

666 XYZ
 test
 test
 test
 sn38 1nw

This data will be used on any KFI or Offers produced.
 If any of this needs amending, please click on [Manage my details](#)

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

1 A new case must be created first, even to generate a KFI. [Create new case](#)

2 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' [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	Mdtstthree 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

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- 1 Select the case that you wish to 'Attach documents' to by clicking 'Open'.
- 2 If the case is not available from the list on the 'My Home' page, click 'Search for a case'.

Nationwide NFI Online Help - 0800 545 3131 Secure log on: Admin Tav

For Intermediaries

My Home Case Home Lending Criteria Save and Exit Log out

Your Details
 This is the information held on our database for you...
 Warner Holt Financial Services
 FSA: 400020
 Tel: 01234 159357
 Mob: 07896541230
 Fax: 01234 951357
 Email: Mstestuser2@nbsdev.co...

666 XYZ
 test
 test
 test
 sn38 1nw

This data will be used on any KFI or Offers produced.
 If any of this needs amending, please click on [Manage my details](#)

Case Search

Search Firm: [Refresh intermediaries list](#) 1

If you change the firm you wish to search, you must refresh intermediaries list.

To find a case please complete at least one field:

Search Criteria

2 Case ID:

Surname:

Forename:

Postcode:

Case owner: 3

Current Cases:

Cancelled Cases:

Submitted Cases:

All Cases:

4 [Search](#)

Search Results
 Blank search results found and matches. Generally, when searching for cases, the more fields you complete the more chance you'll have of finding a match.

[Create new case](#)

Version: 8.0.0.0 Page 10: F1180

- 1 Select your firm and click 'Refresh intermediary list'.
- 2 Enter the Case ID.
- 3 Select the 'Case Owner' (Intermediary) who created the case on NFI Online.
- 4 Click 'Search'.

Nationwide NFI Online Help - 0800 545 3131 Secure log on: Biju Chacko

For Intermediaries

My Home Case Home Lending Criteria Save and Exit Log out

Your Details
 This is the information held on our database for you...
 Warner Holt Financial Services
 FSA: 400020
 Tel: 01234 159357
 Mob: 07896541230
 Fax: 01234 951357
 Email: Mstestuser2@nbsdev.co...

666 XYZ
 test
 test
 test
 sn38 1nw

This data will be used on any KFI or Offers produced.
 If any of this needs amending, please click on [Manage my details](#)

Case Search

To find a case please complete at least one field.

Search Criteria

Case ID:

Surname:

Forename:

Postcode:

Current Cases:

Cancelled Cases:

Submitted Cases:

All Cases:

[Search](#)

Search Results

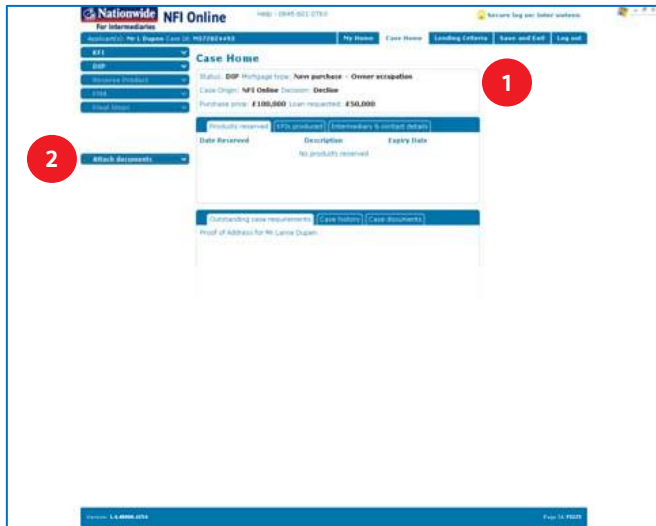
Intermediary	Case ID	Created On	Status	Applicant(s)	Action
Chacko, Biju	M650108837	07-03-2018	DIP	Howard T;	Open Cancel

1 [Create new case](#)

Version: 8.0.0.1 Page 10: F1409

- 1 Once you find the correct case, click 'Open'.

Scanning



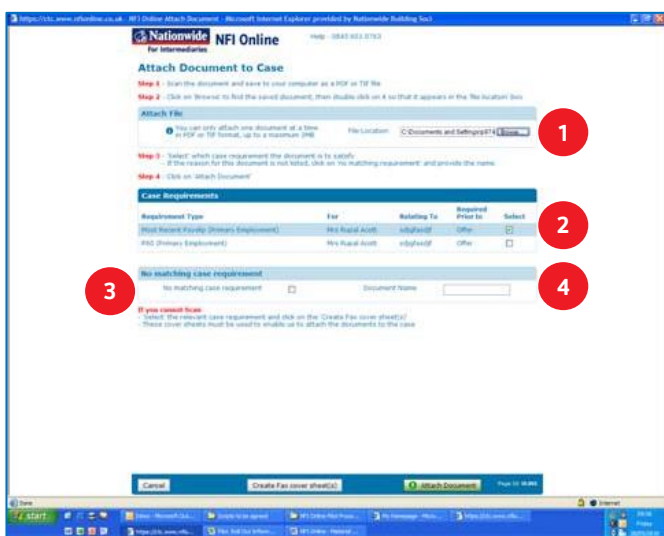
1 Scan each 'Case Requirement' (proof) separately and save it your computer as a PDF or TIF file. It must be under 3MB in size to enable successful attachment. If the document is over 3MB, please follow the 'Faxing' process in NFI Online.

Login to NFI Online.

From the 'My Home' screen, find the appropriate case and click 'Open'.

You will then see the 'Case Home' page, this is the control centre for the case.

2 Click 'Attach documents'.



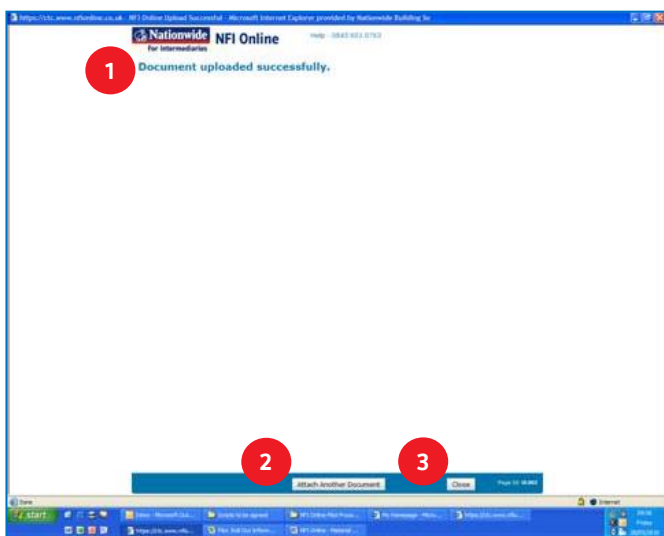
1 Click 'Browse' to find the file you wish to attach and double click on it to select. You will now see the file name in the file location box.

2 Select the appropriate 'Case Requirement' by clicking on the tick box next to it.

3 If the document you want to attach is not listed as a 'Case Requirement', tick the 'No matching case requirement' box and enter the details in 'Document Name'.

4 Click 'Attach Document'.

Note: It's important to scan each document separately to enable it to be attached to the correct 'Case Requirement'. This will speed up the review of each document and avoid unnecessary chase-ups.



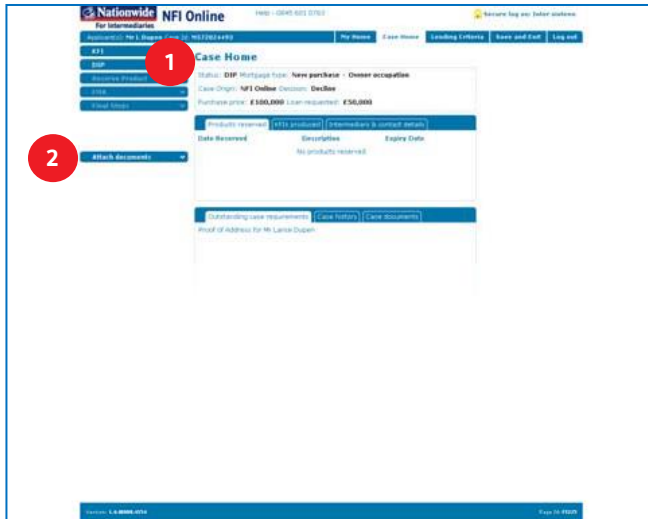
1 Once the document is successfully attached, you'll see the 'Document uploaded successfully' confirmation screen.

2 If you need to attach another document, click 'Attach another document'.

3 If you're finished, click 'Close'.

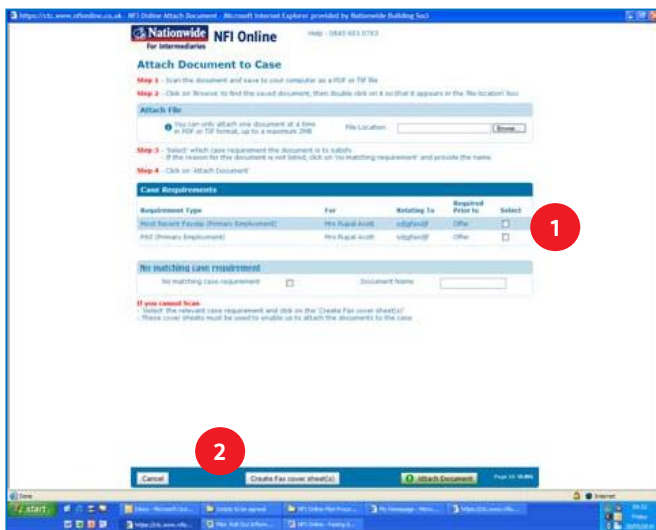
Faxing

If you don't have a scanner you can still fax proofs to us.



- 1 Go to the 'Case Home' page.
- 2 Click 'Attach Documents'.

This will open the 'Attach Document to Case' screen as if you were using the 'Scan & Attach' method.



- 1 On the 'Attach Document to Case' screen, select each 'Case Requirement' by clicking on the applicable tick boxes.
- 2 Click 'Create Fax cover sheet(s)'.

1 Document Submission Coversheet
 When submitting any document
 it MUST be attached to the correct coversheet
 e.g. coversheet, proof, coversheet, proof...

FAX TO: 01604 852808

Case ID:

Applicant(s) - Name:

Date:

Document being submitted: For office use:

To avoid delays in obtaining an offer, you may wish to note...
 Scanned documents will be dealt with as a first priority
 Faxed documents take second priority
 Using the postal system delays documents getting to us

As a last resort - if you have to submit by post please send to:
 Nationwide Building Society
 Mortgage Administration
 1100040
 Swindon
 SN20 1NW
 (WE DO NOT SEND ORIGINALS)

MSO114 (Dec 2009)

- 1 A separate 'Fax Document Submission Coversheet' will be produced for each document you have selected, showing the details of the relevant document(s).

Print out the cover sheets and place each one in front of the corresponding document(s) and fax them to the number shown on the cover sheet.

It's essential that the cover sheets are sent in front of their corresponding documents because on receipt of these documents, we will scan and attach them onto the case shown on the fax coversheet.

Once we've attached them to the case, you'll be able to see them (usually within a few hours), by checking the 'Case Documents' tab on the 'Case Home' screen.

Tracking Attached Documents

1 Click on 'Case Home' to refresh the page.

2 Click on 'Case History', you will see; '<Document Name> received and awaiting review'.

- 1 Click on 'Case Home' to refresh the page.
- 2 Click on 'Case History', you will see; '<Document Name> received and awaiting review'.

1 Click on 'Outstanding case requirements' to see that the case requirements you've provided documents for have been removed from the list.

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1 Click on 'Case Documents' and then 'View' to see the attached document.

2 Click on 'View' to see the attached document.

- 1 Click on 'Case Documents' and then 'View' to see the attached document.
- 2 Click on 'View' to see the attached document.