

# NFI Online

## Quick Start Guide

### **What you'll find in this guide**

- Site Navigation
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## Site Navigation

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## Getting around our site

Upon a successful login you will be presented with the screen below; this we call 'My Home'

Before creating a Mortgage Illustration or performing a DIP, a case will need to be created first. Press the 'Create new case' button to start this process.

The screenshot shows the 'My Home' dashboard for Anuj Kumar. On the left, there is a 'Your Details' section with contact information for David & Associates. The main area features a 'Create new case' button and a search bar. Below these is a table of the last 15 cases worked on, with columns for Case Id, Created On, Status, Applicant(s), Intermediary, and Action. A 'Manage my details' button is located at the bottom of the user details section.

Case Id	Created On	Status	Applicant(s)	Intermediary	Action
M601158807	22-02-2024	DIP	Koala C; Koala A;	Kumar, Anuj	Open Cancel
M601158797	22-02-2024	Case Created	Koala C; Koala A;	Kumar, Anuj	Open Cancel
M601158692	22-02-2024	DIP	Koala C; Koala A;	Kumar, Anuj	Open Cancel
M601158671	22-02-2024	DIP	Koala G;	Kumar, Anuj	Open Cancel
M601158709	22-02-2024	Declined	Koala K;	Kumar, Anuj	Open
M601158998	26-02-2024	Application Submitted	Koala R;	Kumar, Anuj	Open
M601158980	26-02-2024	DIP	Koala R;	Kumar, Anuj	Open Cancel
M601158905	26-02-2024	Application Submitted	Koala R;	Kumar, Anuj	Open
M601158766	22-02-2024	DIP	Koala C; Koala A;	Kumar, Anuj	Open Cancel
M601158732	22-02-2024	DIP	Koala G;	Kumar, Anuj	Open Cancel
M601158979	26-02-2024	Application Submitted	Koala C; Koala A;	Kumar, Anuj	Open
M601158895	26-02-2024	Application Submitted	Koala G;	Kumar, Anuj	Open
M601158685	22-02-2024	DIP	Zeus J;	Kumar, Anuj	Open Cancel
M601158750	22-02-2024	Offered	Zeus M; Zeus V;	Kumar, Anuj	Open
M601158541	21-02-2024	DIP	Zeus M; Zeus V;	Kumar, Anuj	Open Cancel

Your details appear on the left; if anything here is incorrect you can press the 'Manage My Details' button to make changes.

Here you can see your existing cases and their current status. To open the case you want to work on, click 'Open'.

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## Getting around our site

Cancel, Backward and Continue

### Cancel

Cancel

Press the Cancel button when you've made a keying error on the current page. This will reset all of the entries you've made and send you back to the previous page.

### Backward

Backward

Use the backward button if you need to review, and/or edit information entered on a previous page. A warning will appear if any mandatory information has been missed. **Don't use your browser's back button to go between pages.**

### Continue

Continue

Use the Continue button to progress to the next page of the application stage. A warning will appear if any mandatory information has been missed.

Version: 4.9.359.0 |

Cancel Backward

Continue

Page Id: F12M04

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### Getting around our site

The 'Case Update' page offers a more detailed summary of the case and is split into three sections.

The 'Case Summary' section displays details of the 'Application', 'DIP & Offer', 'Valuation' and 'Solicitor'.

The 'Application' tab shows the **status, origin, application type, loan amount, purchase price/property value** and LTV of the case. Details of the **submission date, completion date** and the **COT status** will also show here.

The 'DIP & Offer' tab shows details of the **Decision in Principle** and **Mortgage Offer** if the application has progressed this far.

The 'Valuation' tab shows details of the most recent valuation. When a valuation is scheduled, there may be a message here to inform you that the applicant(s) will be contacted if access to the property is required.

The 'Solicitor' tab shows details of the solicitor if the application has progressed this far. The solicitor's details can't be edited here.

#### Case Update

**Case Summary**

Application | **DIP & Offer** | Valuation | Solicitor

Status: Application Submitted

Origin: NFI Online

Application type: Remortgage

Loan amount: £50,000.00

(Estimated) valuation: £80,000.00

LTV: 26.32%

Submission date: 20/10/2020

**i** The 'COT received?' indicates whether Nationwide have received and successfully assessed the Certificate of Title for this application.

COT received?: No

Completion date

The 'Case Requirements' section displays details of the documents that have been **requested, which applicant this has been requested for** and the **status** of this i.e. Requested, Received etc.

**Case Requirements**

**i** You can get an update on how quickly we will assess your documents by checking our latest service update [here](#).

Document	For	Status	Date
Proof of Address	Dame Amy Koala	Satisfied	20-10-2020

You can find out the latest service levels by clicking here.

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### Creating a new case

From the 'My Home' page click on the 'Create New Case' button.

Create a new case

**Please check your application type against the list of online exceptions that now appears. If the application type you wish to submit is an exception case, please follow the link below for guidance on how to submit this:**

[nationwide-intermediary.co.uk/placing-business/submit-a-case](http://nationwide-intermediary.co.uk/placing-business/submit-a-case)

1. If not then tick the statements box and press Continue.

I confirm that all of the above statements apply

2. Choose your desired submission channel and choose a telephone number that we may contact you on.

3. Please confirm that you've read the 'How Nationwide uses your information' to your clients by ticking the relevant box.

4. Choose the 'Application Type' for this application by selecting from the drop-down menu and select Continue. If 'New purchase' has been selected, an additional question 'Do the applicant(s) currently hold a Nationwide mortgage?' will display. Please answer this question to continue.

5. Enter your applicant's details

- Surname
- Forename
- Date of birth
- Postcode

**Please check this information carefully; once a case has been created this cannot be changed.**

6. If we already have the applicant's information on record we will highlight this to you, and ask if you wish to use this information. To replace, or create new applicant information, press the Create New Applicant button.

Create a new applicant

7. To add a second applicant press 'Add another applicant' and repeat the process from step 5 above. (For additional borrowing and rate switch applications, you'll only need to search for one applicant. The other applicant will be retrieved automatically).

8. For additional borrowing applications, you'll be asked to confirm if the property has any subsequent charges.

9. Once finished press the Create Case button.

Create case

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### Creating a Mortgage Illustration

At this point you can choose to create a Mortgage Illustration or start the DIP. Indicate your choice by clicking on Mortgage Illustration or DIP from the left hand menu.

Please note, for additional borrowing applications, you can't produce a mortgage illustration prior to completing a DIP.

#### Mortgage Illustration

Once you've produced a Mortgage Illustration you will be given the opportunity to promote the information entered into a DIP.

### Fee Payment Options

There are no applicable fees for the currently selected product package.

**Next Steps**

Exit to 'Case Home'

Promote this Illustration data into a DIP

Start a new Illustration

#### Quick Tip

Mortgage Illustration(s) produced can be retrieved at any time from the 'Case Documents' tab found on the 'Case Update' page.

Case History & Documents		
Case history	Case documents	
Name	Date	Action
Illustration 19/02/20 03:42	19-02-2020	<a href="#">View</a>
DIP Certificate 19/02/20 03:32	19-02-2020	<a href="#">View</a>

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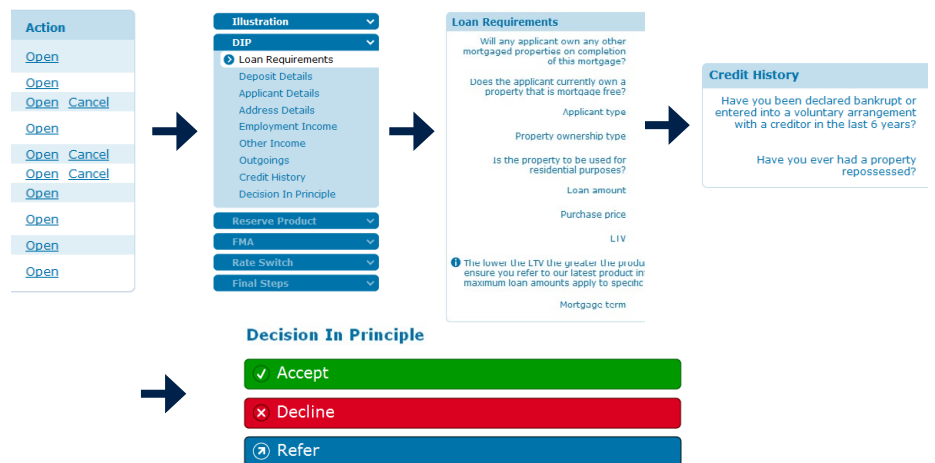
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## Creating a DIP

1. From **'My Home'** locate the case you need to DIP. Click on the **'Open'** link to open it.
2. To start the DIP process click on the DIP option from the left hand menu.
3. The DIP begins with Loan Requirements, where you choose the application type.
4. It finishes with Credit History; where you declare any bankruptcy.



5. The DIP will be submitted and a search will be carried out with credit reference agencies. This will register a soft footprint on your applicant's record which will only be visible to them.
6. An instant lending decision will be provided. Please check the decision text, or the case home page, for any case requirements we've asked for.

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## Creating a DIP

### Things to remember

- You'll be asked for the client's middle name if applicable. Please ensure this is recorded or you will be asked to submit the case again, potentially incurring further fees. If they are an existing member and their name details need to be amended, they will need to contact Nationwide directly.
- When keying any Bonus, Overtime or Commission income, please ensure the figure entered matches the frequency of the bonus payment.

For example: Applicant A is paid a Quarterly bonus of £1000

The screenshot shows a form with two fields: 'Bonus' with the value '£1,000' and 'Bonus frequency' with a dropdown menu set to 'Quarterly'. A blue information icon and text below the fields state 'This equates to an annual income of £4,000.00'. A red dashed arrow points from the '£1,000' value to a callout box on the right that says 'Enter £1000 as the Bonus amount'. Another red dashed arrow points from the 'Quarterly' dropdown to the same callout box.

Then choose Quarterly as the Bonus frequency from the dropdown box.

**Don't annualise the figure first and then choose Quarterly, as this will inflate the figure.**

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## Creating a DIP

### Things to remember

If your application is part of an External scheme (**Help to Buy**) then please choose '**Help to Buy**' for the below question found on the '**Loan Requirements**' page.

If your application is part of an External scheme (**Help to Buy**) then please choose 'Yes' to the below question found on the 'Loan Requirements' page. Please ensure you choose the appropriate Application Type, i.e. Equity Share.

Need guidance on keying Loan Requirements? [Click here](#)

### Loan Requirements

Will any applicant own any other mortgaged properties on completion of this mortgage? No, only one mortgaged property ▾

Does the applicant currently own a property that is mortgage free?  Yes  No

Applicant type Firsttime buyer ▾

**i** **First Time Buyer:** An applicant who has not had a mortgage in the last 3 years

Property ownership type Standard ▾

Is the property to be used for residential purposes?  Yes  No

Does this application relate to a special scheme? Please select..  
None  
Help to Buy

Loan amount £50,000

Purchase price £100,000

LTV 50.00%

**i** The lower the LTV the greater the product choice that may be available. Please ensure you refer to our latest product information as further LTV restrictions and maximum loan amounts apply to specific products.

Mortgage term 9 0

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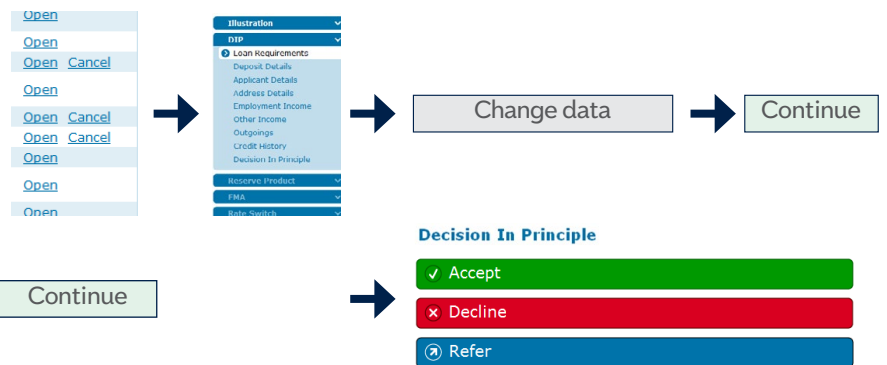
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### Reprocessing a DIP

You can re-model and then re-process your DIP decision, providing the original DIP decision permits it. Here's how:

1. From **'My Home'** locate the case you want to reprocess and click on the **'Open'** link to open it.
2. Click the DIP option from the left hand menu.
3. This will take you to the decision screen. To reprocess the DIP click the **'Change Data'** button at the bottom of the page.
4. Use the **'Continue'** button to go through the pages, changing any information as required.



5. The DIP will be re-submitted once the continue button has been pressed. No additional footprint is left on your client's credit file if it is within 90 days of the original decision.
6. A revised lending decision will be displayed on screen.

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## Reprocessing a DIP

### Things to remember

- You're unable to amend any of the following applicant details; or items that appear 'greyed' out:
  - Title
  - First name
  - Middle name
  - Surname
  - Gender
  - Date of birth
  - Address details
- If you've already reserved a product for this case, you'll see a new screen in the DIP called '**Existing Product Reservation**'. If the existing product reservation is no longer valid, due to the changes you've made, you may have to reserve an alternative product, which could incur additional fees. The system will advise you if this is the case.
- If the '**Change Data**' button is not appearing where you believe it should be, the case might not be editable. Please contact our Technical Support Advisers via Broker Chat by selecting '**Start Technical Support Chat**' to check the status of the case (pre-submission only).

The '**Change Data**' button will not appear if you have entered the Final Steps of the application or fully submitted it. For amendments to a fully submitted case, please see the Amend Case section of this guide.
- A new soft footprint will be left if 90 days have passed since the original decision date.

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## Reserving a Product

### Product Selection

1. Choose the desired Repayment Basis.

### Product Code

2. If you know the product code, select 'Yes'. Input the product code then click '**Continue**' to progress to '**Product Selection**'. If you don't know the product code select 'No' and follow the steps below.

### Product Sets

3. If you don't know the product code check the box to confirm the type of product you have sourced.
  - Fixed
  - Tracker
  - All

### Product Term

4. Choose your desired product term from the drop down list.

### Product Fee

5. Choose the preference and select '**Continue**' to progress to '**Product Selection**'.

### Eligible Products List

1. Review the list of products displayed on-screen and tick the box to the right of the product you have chosen. The product details will be shown underneath, check this carefully to ensure this is the correct; particularly in the case of free legal variants. **If necessary please check the product codes on our website.**

Press  to progress to '**Fee Payment Options**'.

### Fee Payment Options

1. Please specify your preference for the payment of fees using the drop down list provided.
2. Press  to progress to '**Mortgage Illustration**' options.
3. Please note that once fee payment options have been selected, they can't be changed as this would be classed as a change of advice and a new case would need to be keyed.

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## Reserving a Product

### Obtain New Mortgage Illustration

1. If you require a new Mortgage Illustration, due to a change of product, then choose Yes and follow the prompts. Otherwise press **Continue** to pay, or defer, the fees.

### Fees Payable

1. A product fee may be applicable in order to reserve the product. Please bear this in mind if you plan to return to the application at a later time.
2. Please specify how the applicant(s) wish to pay for the product fee using the drop down list.
3. Press **Continue** once you've made your choices.
4. A summary of fees being charged will appear at the top of the screen.

### Fee Option

1. You can opt to pay all fees upon submission of the FMA, including any applicable product fee; however if the product carries a fee, the product won't be reserved until this has been paid.

### Card Payment Details

1. Please enter the card details to be used for payment. Unfortunately we're unable to accept Maestro cards, typically these begin with the digits '67'.
2. Press **'Make Payment'** to finalise the reservation; or **Continue** if you've opted to pay fees at final submission. Please **do not** press **'Make Payment'** unless you have the card details to hand and are in a position to process the payment. Once opened you should not close the payment screen or press 'back' on your browser as this may prevent you from making the payment at a later time.
3. You'll receive confirmation that payment was successful, similarly you'll be warned if it was unsuccessful and provided the opportunity to try again.
4. Press **Continue** to view product confirmation and the facility to print a payment receipt.

**Product confirmation, and the payment receipt, can be viewed from Case Home at anytime.**

### Things to remember

- If your product carries a fee, it will not be reserved until you have paid the non-refundable product fee.
- Please check the product code carefully if seeking the free legal variation.
- Any changes made that affect the LTV may require you to reserve a new product incurring an additional fee. Please contact Dedicated Broker Support on 0345 600 31 31 – Option 1 if you are unsure.

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## **Full Mortgage Application**

### **Things to remember**

- After a case has been fully submitted it may be possible to make some amendments to the application. To do this, please use the amend case function.
- When entering further details of the loans to be repaid within 6 months, please make sure to enter these loans only. If a loan is to continue please don't enter it here. The total monthly balance must match the figure at the top of the page.
- You'll be unable to complete the FMA if the property details weren't completed in the DIP. Please refer to the reprocessing section on page 13 of this guide, add this information and resubmit the DIP. These changes may impact upon affordability.
- When searching for a solicitor, two fields must be completed. Enter the first few characters of the solicitor's company name and either the town or postcode.
- Following submission of the FMA, a hard footprint will be registered against your applicant's credit record(s).

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### Amend Case

It's possible to amend remortgage and new purchase applications (including porting) after submission. Details in the following areas can be amended:

- Purchase price
- Loan amount
- Deposit details
- Product
- Mortgage Term
- Porting loan selection(s)
- Bank details
- The reason for additional borrowing on a remortgage application
- Whether you are Porting or not (Existing Customer New Purchase only)

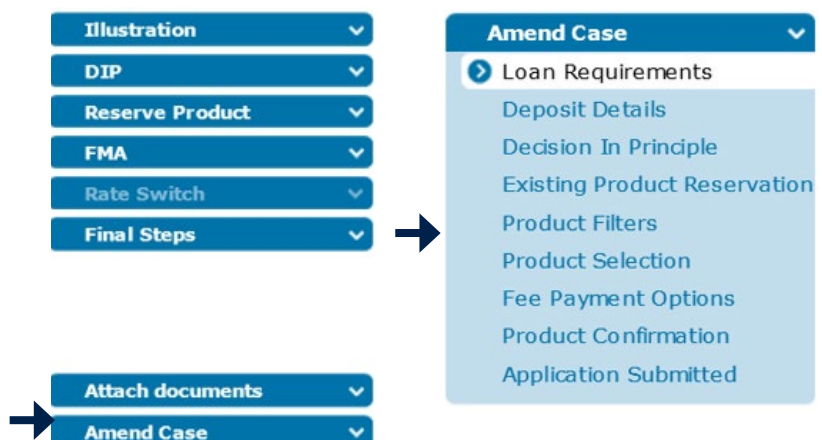
You can also cancel these application types through the 'Amend case' option in NFI Online.

Whilst the case status is 'Amend Case', all processing will be paused.

For post submission case amendments outside of these areas, you can contact the service centre on 0345 730 20 11 for support.

Please note, there are reasons that may prevent you from amending a case within the amend case function which include but are not limited to:

- The case has not been submitted
  - The mortgage offer has expired
  - The case is currently being edited by another user
  - The Certificate of Title (COT) has already been received
1. From the 'My Home' page, open the case you need to make post submission amendments to.
  2. Locate the 'Amend Case' button on the left-hand menu and click on this.
  3. If it is possible to edit the case using the amend case function, a new navigation bar will appear.



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## Amend Case

4. Follow the prompts on each screen, making any amendments required.

Please note, some amendments may trigger the system to process a new decision in principle. This may result in an additional footprint on your client(s) credit files, new proofs being requested, a new valuation requirement and a new product may need to be selected.

5. When selecting a new product, if there are changes to the fee requirement, either a new fee will need to be paid or a fee which has already been paid will be refunded. Refunds will be paid to the card the fee was originally taken from. Some new products may require solicitor details to be entered. You will be prompted to provide these solicitor details before you can resubmit your application.





6. Once each page has been completed, you will be able to resubmit your application and it will continue to be processed. You can check if your case has been successfully resubmitted by checking the '**Case Home**' screen to ensure the case status has changed to '**Application Submitted**'.

### Case Home

**!** This case has been submitted. If you'd like to make a change, select 'Amend Case' from the menu on the left of this screen.

Status: <b>Application Submitted</b>	Mortgage type: <b>New purchase</b>
Case Origin: <b>NFI Online</b>	Decision: <b>Accept</b>
Purchase price: <b>£60,000.00</b>	Loan requested: <b>£50,000.00</b>

### Frequently Asked Questions

- Where can I get an update on this case? 
- Where can I retrieve documents relating to this case? 
- How can I make a change to this application? 
- How do I change the property my applicant(s) is buying? 

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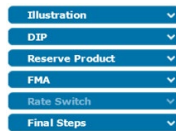
### Case Documents

Document proofs can be scanned and sent to us through our Scan and Attach service.

**Please note – only upload proofs which have been requested. Uploading additional documentation that has not been requested may delay your application.**

**When scanning your documents please ensure they are saved in PDF, TIF or JPEG format; and are no bigger than 9MB per file. Attempting to send files that are too large, or of a different file type, will generate an error message.**

1. From the **'My Home'** page open the case you need to attach documents against.
2. Locate the **'Attach Documents'** button on the left hand menu and click on this.



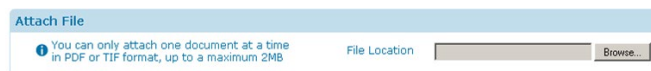
3. Tick the box to the right of the requirement you wish to attach.

Case Requirements				
Requirement Type	For	Relating To	Required Prior to	Select
P60 (Primary Employment)	Mr Clark Alexander	Nationwide	Offer	<input type="checkbox"/>

No matching case requirement				
No matching case requirement	<input type="checkbox"/>	Document Name	<input type="text"/>	

4. Now click the Browse button at the top of the screen.



5. Browse to the relevant file, using the window that opens, select it and press Open.
6. Finally press the **Attach Document** button found at the bottom of the page.
7. To attach a document not on the list, tick the box by **'No Matching Case Requirement'** as per point 3. Enter a short name in the text box, and then follow from point 4.

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### **Case Documents**

Document Proofs can also be emailed to the following mailbox  
**[mortgagedocuments@nationwide.co.uk](mailto:mortgagedocuments@nationwide.co.uk)**

When sending documents via email please ensure the Mortgage Application (M) Number is added to the email.

Where proofs are received by email without the (M) number these will not be actioned and will cause delays to your application.

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## **FAQs**

### **General**

- Q.** I've opened my case but it's not allowing me to add, or change any information.
- A.** The case isn't editable. This could be for a number of reasons, including but not limited to:
- Someone else has the case open in edit mode
  - The COT has been received and the case can no longer be amended
- Some decline decisions will also mean that a case can't be edited. If you're unsure as to why the case can't be edited, please contact us via Broker Chat by selecting '**Chat Now**' and choosing '**Online technical support**'.

### **DIP**

- Q.** I've not been asked the correct questions for my Shared Ownership, Equity Share, or other scheme-related case on the Loan Requirements page.
- A.** Please check that you have chosen the appropriate scheme from the '**Property Ownership Type**' dropdown, found on the loan requirements page. Once this has been chosen the correct questions will appear.
- Q.** I'm experiencing difficulty entering an address I know to be correct.
- A.** Please contact us via Broker Chat by selecting '**Chat Now**' and choosing '**Online technical support**'.

### **DIP Reprocessing**

- Q.** My case has been declined, however when attempting to reprocess the DIP it's not allowing me.
- A.** Some decline reasons do not allow the DIP to be reprocessed; to check the status of your case please contact us via Broker Chat by selecting '**Chat Now**' and choosing '**Online technical support**'.
- Q.** The case has been scored however I've noticed that the applicant's name and/or address details are incorrect. Can I now amend these?
- A.** Once the DIP has been scored you are unable to amend the current and previous address history, or applicant's name. You will need to create a new application. Providing that this is done and scored within 5 calendar days of the original DIP decision, no additional soft footprint will be left on your clients' credit record.

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### **Product Reservation**

- Q.** I've already reserved a product but now wish to change it. Is this possible?
- A.** To reserve a new product, reopen the case and then click on **'Reserve Product'** and follow the onscreen prompts. Once the application has been submitted, you may be able to change the reserved product through the amend case function. Please see the **'Amend Case'** section of this guide.

### **FMA**

- Q.** I'm finalising details of the loans to be cleared, but it's not allowing me to continue from this page.
- A.** During the DIP you declared the loans being repaid and their current monthly payment. This information needs to match on the FMA. Therefore, only enter the details of loans being repaid and ensure the total monthly payments are equal to (not greater than) the figure at the top of the page. If this information has changed since the DIP, you'll need to reprocess the Outgoings section in the DIP to ensure this is correct, and then retry.

### **Attach Documents**

- Q.** An error is appearing when I attempt to send you my case requirements.
- A.** When scanning your documents please ensure they are saved in .TIF, .PDF or .JPEG format; and that they are below 9MB in size. If the document is more than 9MB, you will need to split this down into smaller parts and attach separately.
- Common things to check on your scanner software: Image resolution is set to 150dpi or lower, and colour is black and white or greyscale.**

### **Other**

- Q.** When opening case documents they appear blank or there is an error on the screen.
- A.** Please ensure that you are using a compatible browser when accessing our website.

If your query is not listed above then please contact us.

For criteria, policy or product related queries please contact us via Broker Chat by selecting **'Chat Now'** and choosing **'Product and criteria'**

For technical assistance please contact us via Broker Chat by selecting **'Chat Now'** and choosing **'Online technical support'**

For case requirements and post-submission queries, call the Mortgage Service Centre on 0345 730 20 11.

Call **0345 600 31 31**  
visit **nationwide-intermediary.co.uk**