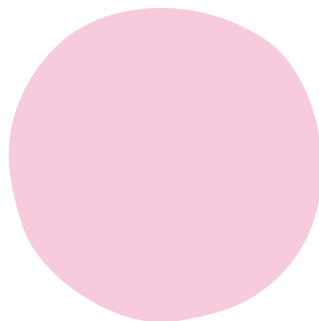




# Taking back control and amending property details.



# Taking back control and amending property details:

## Important

When you “take back control” of a case, it is removed from our workflow and will return to ‘pre-offer’ status.

Unless the application is fully resubmitted, no further prompts or updates can be provided.

Where changes are being made to the original DIP, a new credit decision will be generated when the application is resubmitted.

Only a soft footprint will be left unless a material change (name, address or date of birth) is made resulting in a registered search being left.

Please note this will remove the property details that are currently keyed.

If on the case summary, you can see the valuation report as ‘Requested’ then you will need to call the operations team for this to be cancelled before the new property details can be keyed.

1. Click ‘Take back control of the case’ in the ‘Case summary’ page.

Document	Status
Address Verification (MG00000003222127) For Mark Spencer	Requested
Name Verification (MG00000003222127) For Mark Spencer	Requested
Latest payslip (MG00000003222127) For Mark Spencer	Requested

2. Confirm and check the declaration. Then select the reason for wanting to take back control of the case and click ‘Start’.

I confirm that all applicants have consented to the case data being amended on their behalf.

Change of product(s)

- Enter details of a new security property
- Update to loan requirements details
- Update to personal details
- Update to repayment strategy details
- Update to income/expenditure details
- Update to employment details
- Update to conveyancer details

3. You'll be taken back to the DIP to make the required amendments.

4. Please enter the details to the 'Loan requirements' & 'Deposit details' tab.

1 Section requires attention before a DIP request can be made.

- Loan requirements
- ✓ Personal details
- ✓ Address history
- ✓ Current income
- ✓ Committed expenditure  
No committed expenditure has been provided
- ✓ Household expenditure  
No household expenditure data has been provided
- ✓ Future changes
- ✓ Credit history
- Submit for decision

## Loan requirements

**Property**

Property location

England  
 Scotland  
 Wales

Property ownership type

Standard  
 Shared Ownership  
 Right to Buy  
 Equity Share  
 Discount/Concessionary Purchase

Has the applicant(s) located the property they wish to buy?

Yes  No

Property Type

Purchase price

£

Is the property a new build / newly converted or refurbished?

Yes  No

Will any of the applicants have legal ownership of any properties other than the security property?

Yes  No

**Loan requirements**

Total loan amount

£

Preferred loan term

years  months

Interest only amount

£

[Personal details](#)

1 Section requires attention before a DIP request can be made.

- ✓ Loan requirements
- Deposit details
- ✓ Personal details
- ✓ Address history
- ✓ Current income
- ✓ Committed expenditure  
No committed expenditure has been provided
- ✓ Household expenditure  
No household expenditure data has been provided
- ✓ Future changes
- ✓ Credit history
- Submit for decision

## Deposit details

Please enter the source(s) of the deposit of £100,000.

**Add deposit details**

Source of deposit

Amount towards deposit

£

[Add](#)

**Deposit list**

No sources of deposit have been entered.

[Personal details](#)

5. Make all necessary amendments to the DIP then click 'Get DIP result' on the 'Submit for decision' section. We only leave a soft footprint at Decision in Principle stage.

A DIP request can now be made.

- ✓ Loan requirements
- ✓ Deposit details
- ✓ Personal details
- ✓ Address history
- ✓ Current income
- ✓ Committed expenditure  
No committed expenditure has been provided
- ✓ Household expenditure  
No household expenditure data has been provided
- ✓ Future changes
- ✓ Credit history
- Submit for decision

## Decision In Principle

A Decision in Principle will confirm that we would be prepared to lend the applicant(s) the amount requested. It is not a guarantee because it's subject to proof of income as well as any references we request and a valuation of the property.

**Obtain a credit score**

We only leave a soft footprint at Decision in Principle stage (no record of the search is left until you proceed to full application).

I have explained and the customer has confirmed they understand it is necessary to carry out these searches in order to proceed.

**Submit for a Decision**

[Get DIP result](#)

[Credit history](#)

6. Under Next Steps click 'Select a Product'. This will take you to the 'Product Selection' page which will display the product previously selected.

If you don't wish to amend the product selected, click 'Apply' to proceed.

If you want to amend the current product selected click 'Edit', this will allow you to amend the current amounts allocated to the product as well as the term. If you want to amend the term, click 'Term Change'.

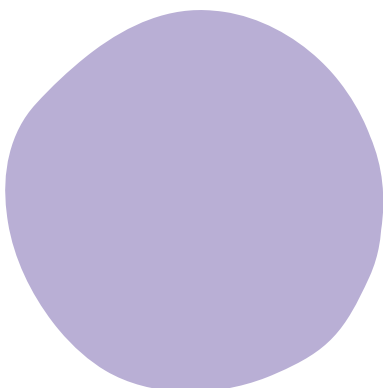
If you want to amend the repayment/interest only amount, click 'Repayment Change'. Once you're happy with your amendments click 'Select'.

If you want to select a different product click 'Remove' on the current product selected. Input the details of the loan part and either input the Product code and click 'Search'. If the product is unknown, click 'Search'.

The screenshot shows a 'Loan parts (1)' summary page. On the left, there are sections for 'Loan requirements', 'Costs', 'Affordability', and 'Payment route'. The main area displays loan details: 'Repayment amount' of £100,000, 'Interest only amount' of £0, and 'Term' of 40 years (0 months). There are 'Edit' and 'Remove' buttons in the top right corner, and an 'Apply' button in the bottom right corner. A 'Generate illustration' button is also visible.

7. You'll then be taken to the full mortgage application to enter the new property address, Property details & Valuation details.

The screenshot shows the 'Property address' page. On the left, a sidebar lists application sections: 'Applicant contact details', 'Employment details', 'Property address' (highlighted with a red box), 'Property details', 'Bank details', 'Conveyancer details', and 'Advice, fees & declaration'. The main area has a heading 'Property address' and a note: 'The last decision in principle was based upon a property in England. If the application is for a different property you will need to update these details here and obtain a new decision in principle.' The form includes fields for 'Security address' (Building name or no, Postcode) and 'Tenure' (Property tenure). A 'Find Address' button is highlighted with a red box, and there is a link 'or enter address manually'. Navigation buttons for 'Employment details' and 'Property details' are at the bottom.



3 Sections require attention before an application submission can be made.

- ✓ Applicant contact details
- ✓ Employment details
- Property address
- Property details**
- ✓ Bank details
- ✓ Conveyancer details
- Advice, fees & declaration

## Property details

The last decision in principle was based upon a property in England. If the application is for a different property you will need to [update these details here](#) and obtain a new decision in principle.

**Overview**

Are you purchasing the freehold for the block?  
 Yes  No

What year was the property built?

Which floor is the flat on?  
Please select...

How many floors does the property have?  
Please select...

How many bedrooms does the property have?  
Please select...

How many reception rooms does the property have?

**Property checklist**

Are there...

	Yes	No
any persons aged 17 years or older that are not on the mortgage living in the property?	<input type="radio"/>	<input type="radio"/>
Is the property...	Yes	No
a new built, newly converted or refurbished?	<input type="radio"/>	<input checked="" type="radio"/>
a listed building?	<input type="radio"/>	<input type="radio"/>
habitable?	<input type="radio"/>	<input type="radio"/>
ex local authority?	<input type="radio"/>	<input type="radio"/>
at risk of coastal or river erosion?	<input type="radio"/>	<input type="radio"/>
to be used for business purposes?	<input type="radio"/>	<input type="radio"/>
above, below or around commercial premises?	<input type="radio"/>	<input type="radio"/>
Does the property have	Yes	No
a garage or parking space?	<input type="radio"/>	<input type="radio"/>
a plot size greater than one acre?	<input type="radio"/>	<input type="radio"/>
walls constructed of brick, block or stone?	<input type="radio"/>	<input type="radio"/>
a roof constructed of either tile or slate?	<input type="radio"/>	<input type="radio"/>

[Property address](#) [Bank details](#)

An application submission can now be made.

- ✓ Applicant contact details
- ✓ Employment details
- ✓ Property address
- ✓ Property details
- ✓ Bank details
- ✓ Conveyancer details
- Valuation details**
- ✓ Advice, fees & declaration

## Valuation details

Valuation type

The product(s) you have selected have a free valuation feature, therefore only upgrade options are available.

Valuation Type  
Please select...

[Conveyancer details](#) [Advice, fees & declaration](#)

8. Click through to the 'Advice, fees and declaration' page, check all information is correct, and when satisfied, click 'Submit Application'. Changes will be saved and transferred to our processing systems.

An application submission can now be made.

- ✓ Applicant contact details
- ✓ Employment details
- ✓ Property address
- ✓ Property details
- ✓ Bank details
- ✓ Conveyancer details
- ✓ Valuation details
- Advice, fees & declaration**

## Advice, fees & declaration

**Advice fee**

Level of advice  
Advice given

Fee you will charge applicant  
£

**Valuation & lender fees**

Please note that the fees listed below relate to the current version of the application only. TSB Bank plc will contact you to take payment for any outstanding fees or arrange a refund as necessary after the application has been resubmitted.

Valuation type  
No Upgrade Required

Lender fees  
There are no lender fees to pay for the selected product(s).

**Declaration**

Please print the [application declaration](#) document and give to each applicant.

- Please confirm that each applicant has been given a copy of the declaration and agrees to the terms & conditions, and that each applicant has been presented with an illustration for the product(s) they are applying for.
- Please confirm that you have the applicant(s) permission to proceed to Full Mortgage Application.

[Valuation details](#) [Submit application](#)