Making the most of TSB Mortgage Pro

User Roles

Administrator

On the ‘Case summary’ page:

- Brokers can allocate administrators from the same firm to their cases. This grants the administrator the same access as the broker.
- Multiple brokers can allocate one administrator to their cases.
- Administrators can also receive the same email updates about a case as a broker would.

Case Viewer

- Case viewers have read-only access to all cases belonging to brokers they are linked to.
- They cannot amend cases or upload documents.

Broker

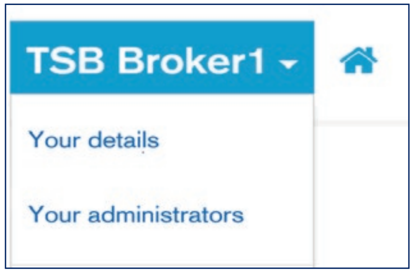
- Brokers have full access to create and complete applications and can only access cases that they have created.
- They also self-manage their list of administrators and case viewers by adding specific or all the administrators within their firm.

Supervisor

- Supervisors have read-only access to all cases under their FCA number, but they can’t update them or create their own.
- Users with a supervisor role will be approved by our Panel team and their firm.
- They can transfer cases between brokers (pre submission).

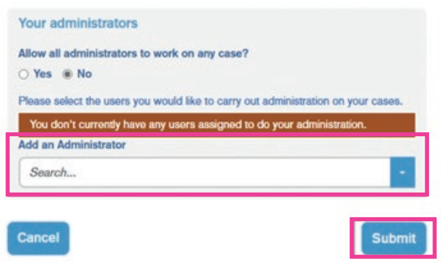
Administrators – Access Broker Cases

- Administrators can be set up to have the same access to cases as brokers.
- Activity is tracked by the system so you know who has been working on the case.
- Brokers can add or remove administrators at any time.



1. **Open the drop-down menu** by clicking your name on the broker homepage.
2. **Select** ‘Your administrators’.
3. **Add or remove administrators**.
4. **Click** ‘Submit’ to save changes.

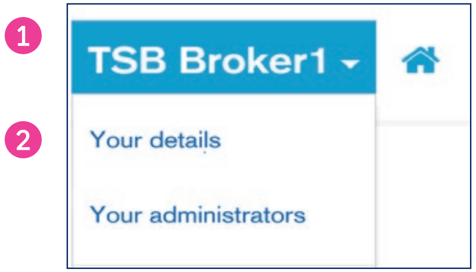
Option 1

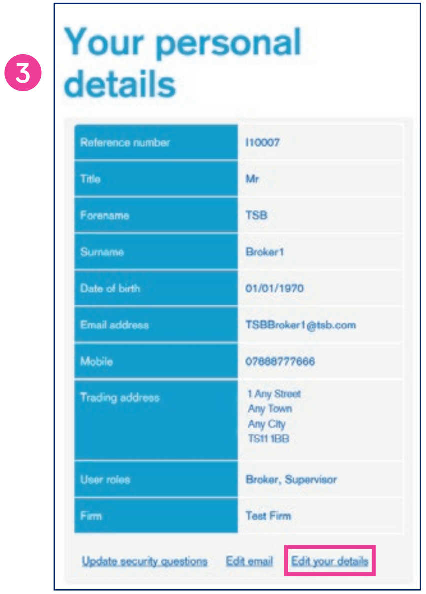


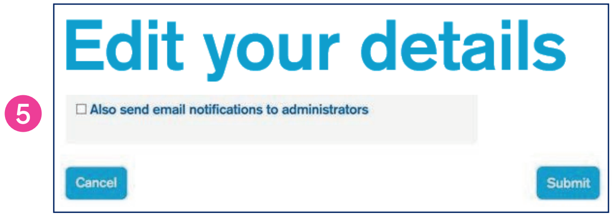
Option 2

Administrators – Receive Case Updates

- Administrators can be set up to receive case updates.
- Just tick ‘also send email notifications to administrators’ when you register with us.
- Brokers can change this at any time.

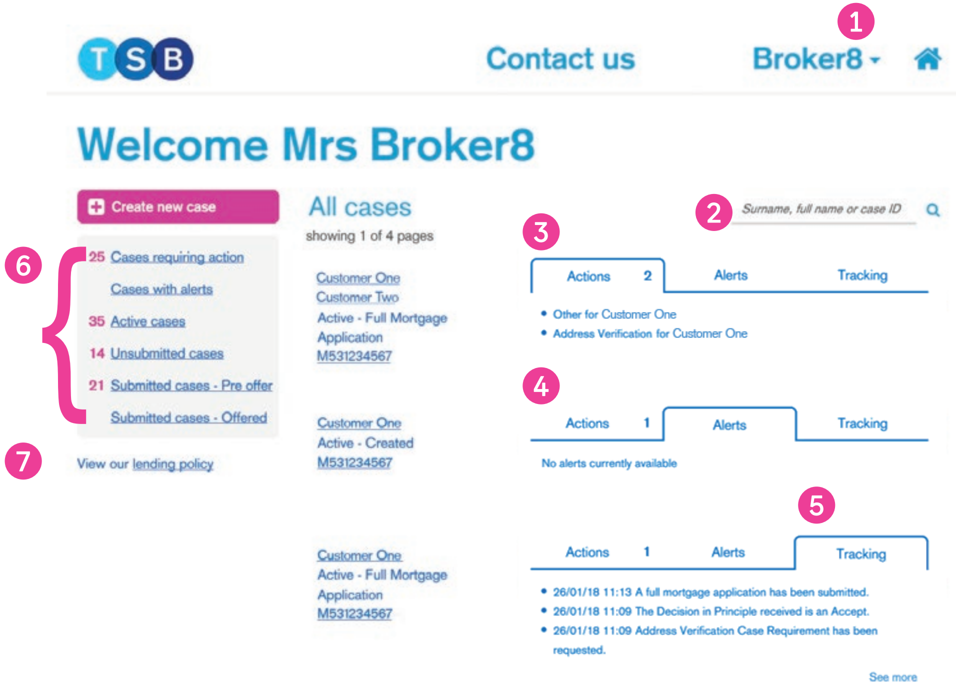






1. **Open the drop-down menu** by clicking your name on the broker homepage.
2. **Select** ‘Your details’, not ‘Your administrator’s’.
3. **Scroll to the end** of ‘Your personal details’ **and Select** ‘Edit your details’.
4. **On ‘Edit your details’, scroll to the end of** ‘Your personal details’.
5. **‘Tick (or un-tick!),** ‘Also send email notifications to administrators’ and click submit’.

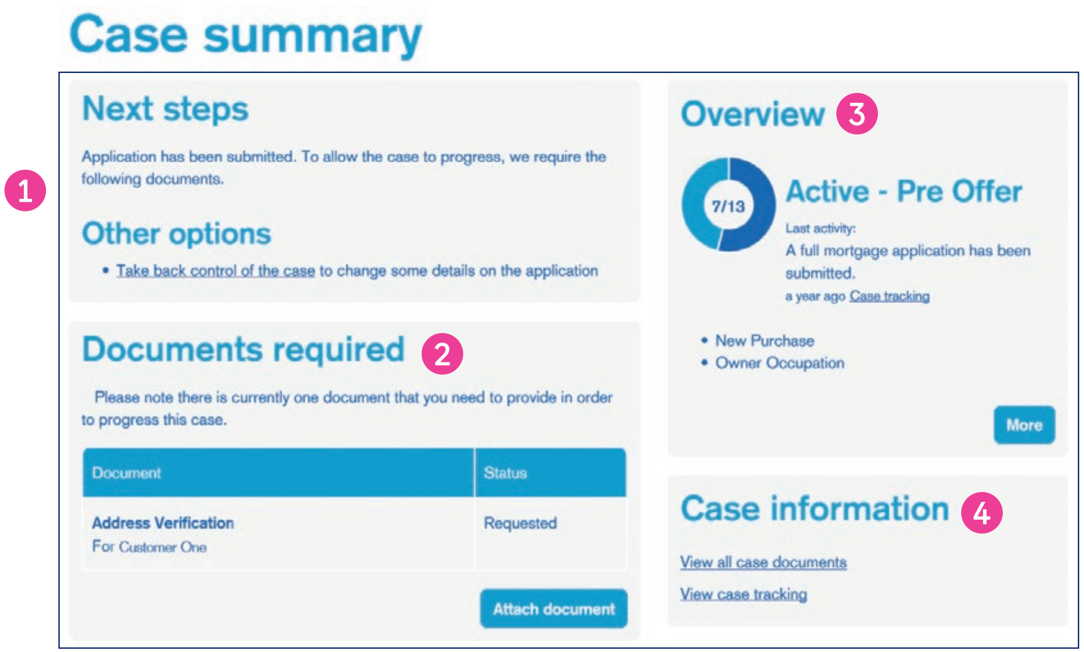
Broker Home Page



1. Update personal details, manage administrators and log off.
2. Search for a case.
3. **Actions**: Outstanding case requirements.
4. **Alerts**: Critical actions e.g. DIP expiring.
5. **Tracking**: Latest 3 updates on a case (with the option to ‘see more’).
6. All cases – split into different categories.
7. View TSB’s lending policy.

Case Summary

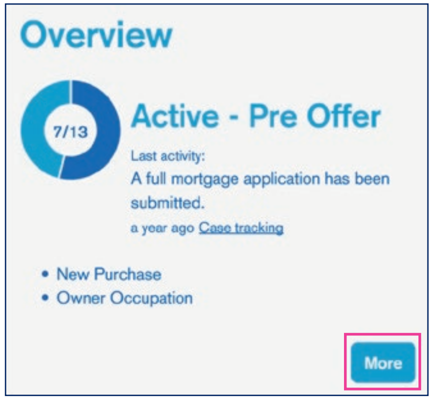
Access the Case summary by clicking the Applicant name or Case ID on the broker home page. You can view the Case summary at any time.

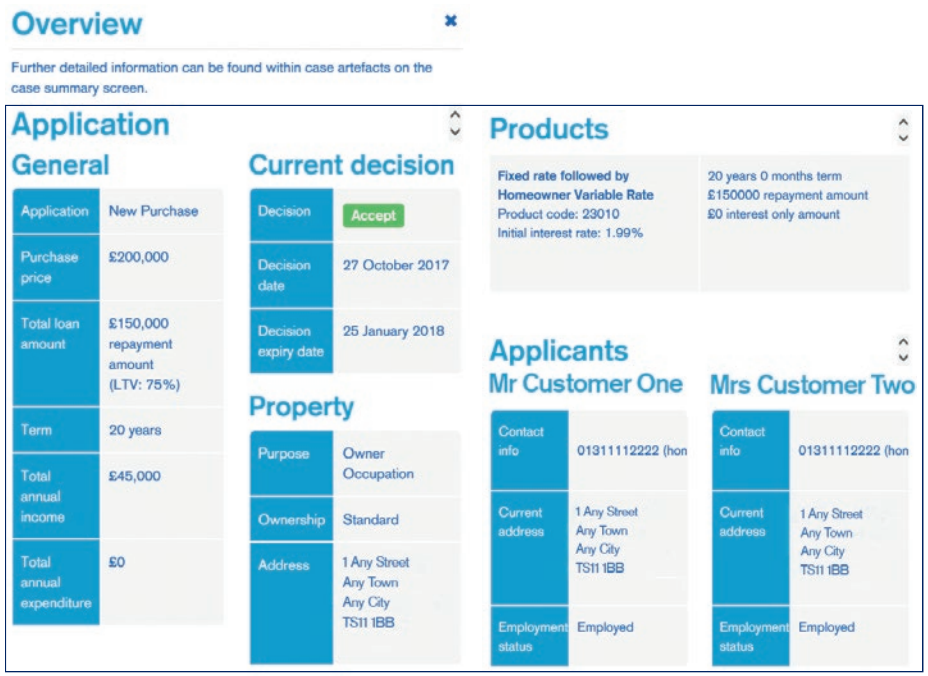


1. **Next steps and Other options:** The actions that need to be completed to progress the case and how to 'take back control' of the case.
2. **Documents required:** See and attach any required documents.
3. **Overview:** A simple snapshot of the case status and link to full case tracking information. Click 'more' to view a full Application summary.
4. **Case information:** View all documents and an update on all actions taken.

Overview

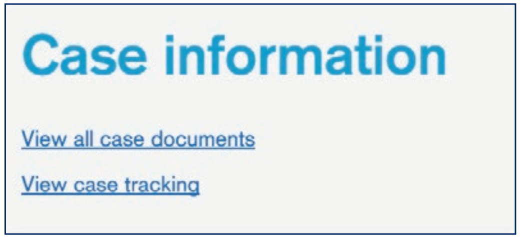
The Overview box shows a summary of the application status. Clicking 'more' opens a full application summary (below) which reveals full details of the application.





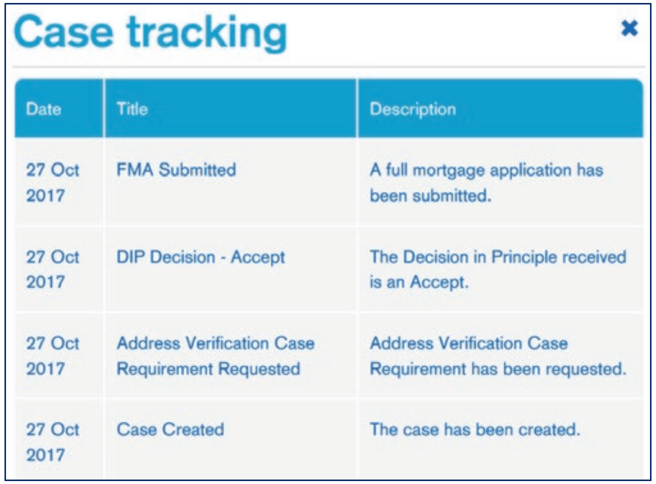
Case Information

- Clicking on 'View all case documents' in the Case information box reveals a list of all documents on the case.
- 'View case tracking' shows all actions that have been taken on the case.




Case documents

Date	Description	
27 Oct 2017	Application Summary Report	View
27 Oct 2017	Application Declaration	View
27 Oct 2017	DIP Summary Report	View
27 Oct 2017	DipCertificate	View


Case tracking

Date	Title	Description
27 Oct 2017	FMA Submitted	A full mortgage application has been submitted.
27 Oct 2017	DIP Decision - Accept	The Decision in Principle received is an Accept.
27 Oct 2017	Address Verification Case Requirement Requested	Address Verification Case Requirement has been requested.
27 Oct 2017	Case Created	The case has been created.

Notification Emails

TSB Mortgage Pro sends automated emails for the following reasons:

- DIP refer – Underwriter accept.
- Physical Valuation – appointment made.
- Physical Valuation – received and approved.
- Conveyancer allocated.
- Case suspended (property unsuitable).
- DIP expiring / expired.
- Offer issued / expiring / expired.
- COT approved (completion date received).
- Fee collected (post-submission).
- DIP result.
- Manual case requirement created.
- Selected products no longer available following receipt of valuation report.
- Completion.