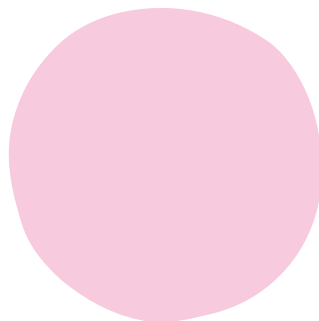




Taking back control and amending property details.



Taking back control and amending property details:

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.

Case summary

Next steps

Application has been submitted. To allow the case to progress, we require the following documents.

Other options

Take back control of the case to change some details on the application

Documents required

Please note there are currently 3 documents that you need to provide in order to progress this case.

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

Attach document

Overview

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Active - Pre Offer

Last activity:
Address Verification Case Requirement has been requested.
a few seconds ago: Case tracking

New Purchase

Owner Occupation

Case information

View all case documents

View case tracking

View case messages (0 unread)

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

Application updates

Declaration

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

Reason for update

Choosing to take back control of the case will suspend all other activity on the case until you resubmit it. Please note that when you confirm below that you wish to continue to update the case, you will not be able to abort this process; the only way to progress will be to resubmit the application.

Please select the primary reason for updating the application

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

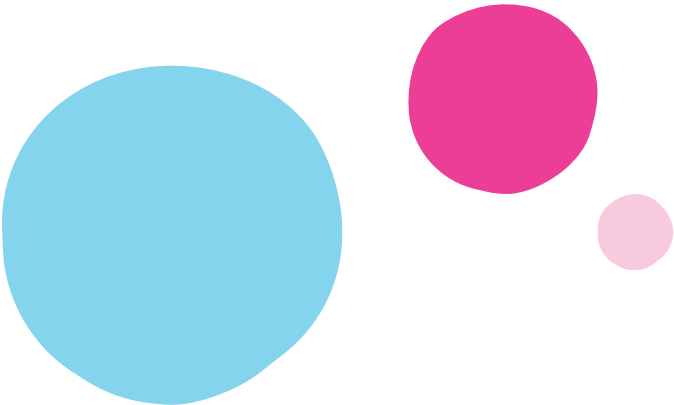
Update to employment details

Update to conveyancer details

Cancel

Start

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

Household expenditure

Future changes

Credit history

Submit for decision

Loan requirements

Property

Property location

☐ England

☐ Scotland

☐ Wales

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

☒ Yes ☐ No

Property type

Please select...

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

Property ownership type

☒ Standard

☐ Shared Ownership

☐ Right to Buy

☐ Equity Share

☐ Discount/Concessionary Purchase

Purchase price

£

Loan requirements

Total loan amount

£ 100,000

Preferred loan term

40 years 0 months

Interest only amount

£ 0

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

Household expenditure

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

Please select...

Amount towards deposit

£

Add

Deposit list

No sources of deposit have been entered.

Loan requirements

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

Household expenditure

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 web interface for selecting a product. On the left, a sidebar titled 'Summary' contains sections: 'Loan requirements' (Repayment: £100,000; Interest only: £0; Preferred term: 40 year(s) 0 month(s)), 'Costs' (Initial monthly payment: £394.63; Total amount payable: £206,478.15), 'Affordability' (Maximum borrowing: £325,000; Minimum term: 4 year(s) 0 month(s)), and 'Payment route' (Test Route: Edit). The main area is titled 'Loan parts (1)' and shows a table with columns: Repayment amount (£100,000), Interest only amount (£0), and Term (40 year(s) 0 month(s)). At the top right of the table are 'Edit' and 'Remove' buttons. At the bottom right is an 'Apply' button. A 'Generate illustration' link is also present.

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 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 is titled 'Property address' and contains a message: '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.' Below this, there are two main sections: 'Security address' with fields for 'Building name or no' and 'Postcode', and a 'Find Address' button; and 'Tenure' with a 'Property tenure' dropdown menu. At the bottom, there are buttons for 'Employment details' and 'Property details'.

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?

0

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 build, 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

£ 0

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