

TMW Online Keying Guide

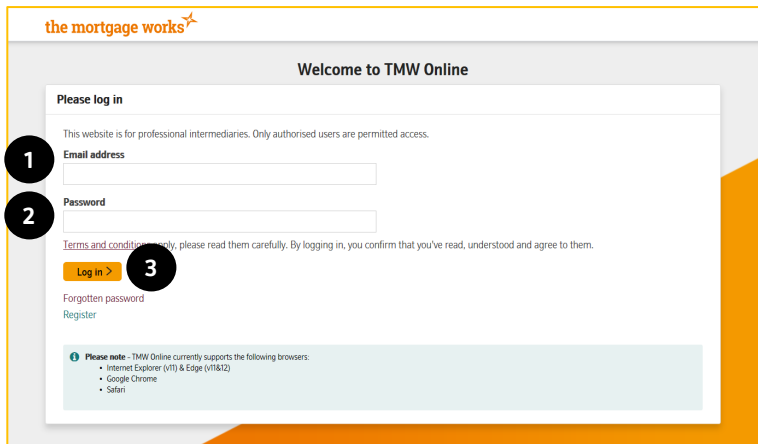
The following guide will take you through the process of submitting an application from start to finish on TMW Online.

In order to visit specific sections of the guide, please select any of the following:

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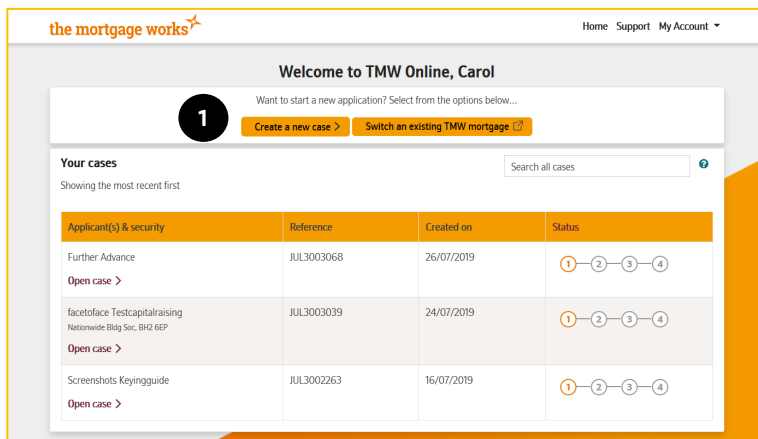
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Log in



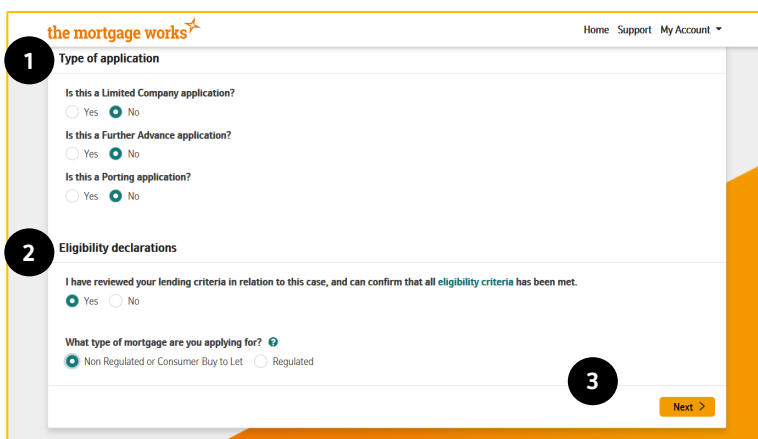
1. Enter your registered email address
2. Enter your password
3. Click Log-In

Create a case



Applicant(s) & security	Reference	Created on	Status
Further Advance Open case >	JUL3003068	26/07/2019	1-2-3-4
facetoface Testcapitalraising Nationwide Bldg Soc. BH2 6EP Open case >	JUL3003039	24/07/2019	1-2-3-4
Screenshots Keyingguide Open case >	JUL3002263	16/07/2019	1-2-3-4

1. Click create a new case



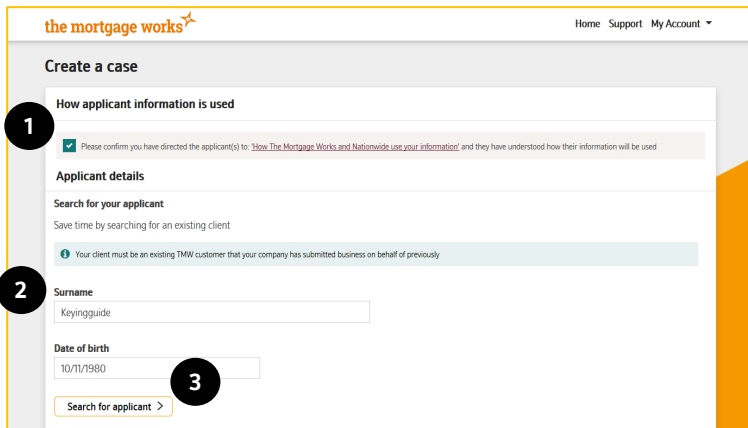
1. Answer the type of application questions
2. Answer the Eligibility Declarations
3. Click Next

*Please note these screenshots are for a standard application, if you would like to see how to key a Limited Company, Porting or Further Advance application please see the relevant section of this guide.

For Intermediary use only

There are two ways to enter applicant data to create a case:-

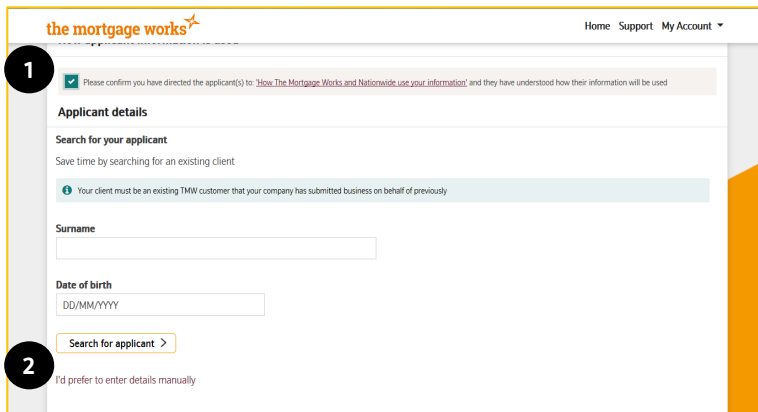
Option a) Search for an applicant your company has used before



The screenshot shows the 'Create a case' form. At the top, there is a checkbox labeled '1' with the text 'Please confirm you have directed the applicant(s) to: [How The Mortgage Works and Nationwide use your information](#) and they have understood how their information will be used'. Below this is the 'Applicant details' section. Under 'Search for your applicant', there is a text input field for 'Surname' with the placeholder 'Keyingguide' and a '2' next to it. Below that is a date input field for 'Date of birth' with the value '10/11/1980' and a '3' next to it. At the bottom of the search section is a button labeled 'Search for applicant >'.

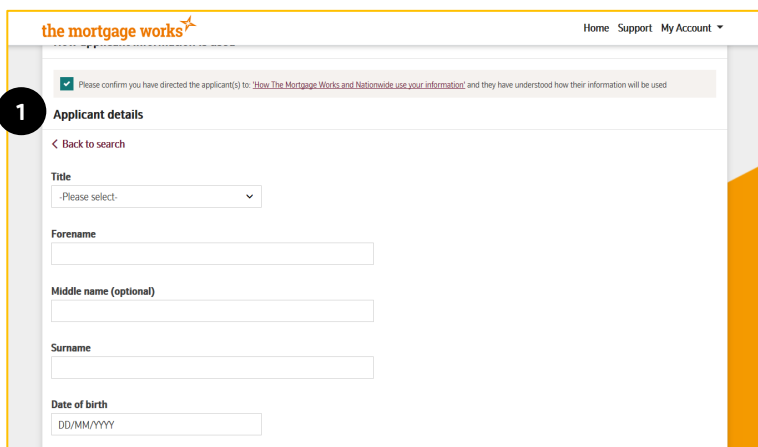
1. Confirm the applicants understand how their information will be used.
2. To search for an applicant your company has used before enter Surname and Date of birth.
3. Click search for applicant and select the correct applicant from the search results. Please note, the search results will display applicants used by the entire FCA number you are registered with.

Option b) Enter applicant data manually to create a new applicant



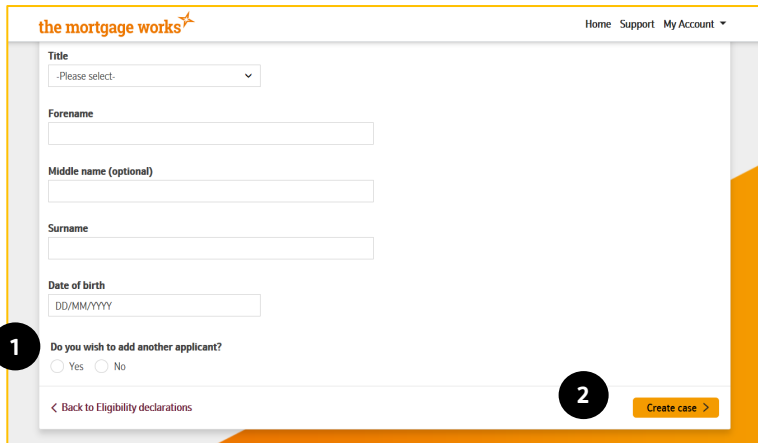
The screenshot shows the 'Create a case' form. At the top, there is a checkbox labeled '1' with the text 'Please confirm you have directed the applicant(s) to: [How The Mortgage Works and Nationwide use your information](#) and they have understood how their information will be used'. Below this is the 'Applicant details' section. Under 'Search for your applicant', there is a text input field for 'Surname' and a date input field for 'Date of birth' with the placeholder 'DD/MM/YYYY'. At the bottom of the search section is a button labeled 'Search for applicant >'. Below the search section, there is a radio button labeled '2' with the text 'I'd prefer to enter details manually'.

1. Confirm the applicants understand how their information will be used.
2. Click I'd prefer to enter details manually

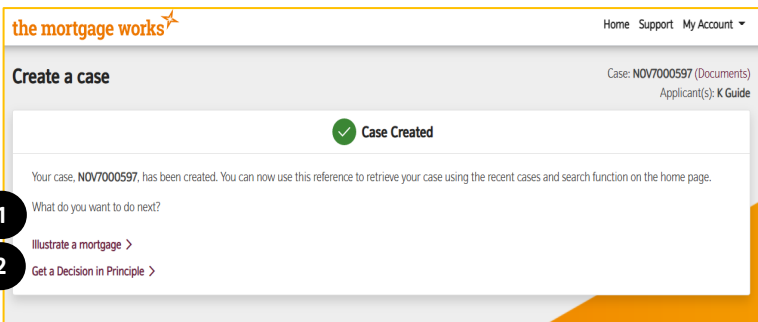


The screenshot shows the 'Create a case' form. At the top, there is a checkbox labeled '1' with the text 'Please confirm you have directed the applicant(s) to: [How The Mortgage Works and Nationwide use your information](#) and they have understood how their information will be used'. Below this is the 'Applicant details' section. Under 'Search for your applicant', there is a '< Back to search' link. Below that are several input fields: a dropdown menu for 'Title' with the placeholder '- Please select -', a text input field for 'Forename', a text input field for 'Middle name (optional)', a text input field for 'Surname', and a date input field for 'Date of birth' with the placeholder 'DD/MM/YYYY'.

1. Enter applicant data:-
 - Title
 - Forename
 - Middle name (If applicable)
 - Surname
 - Date of birth



1. Select if you want to add another applicant. (If you answer yes, follow the above steps to add the second applicant).
2. Click Create case



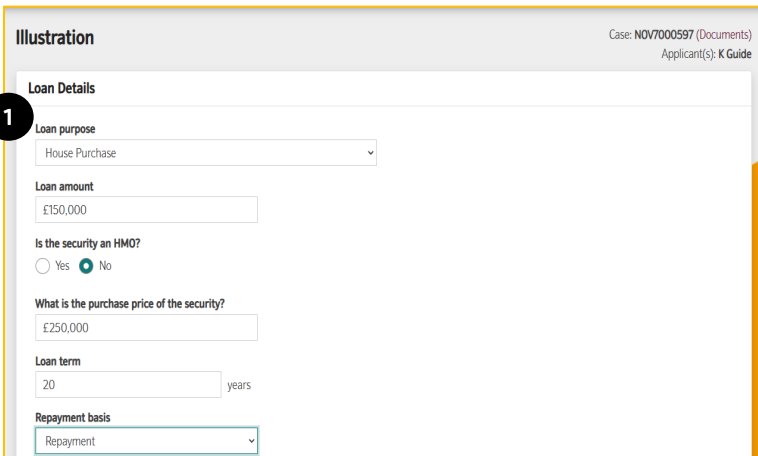
You will be presented with confirmation of the case creation. You will be given the DIP reference on this screen.

From this page you can use the links to either:

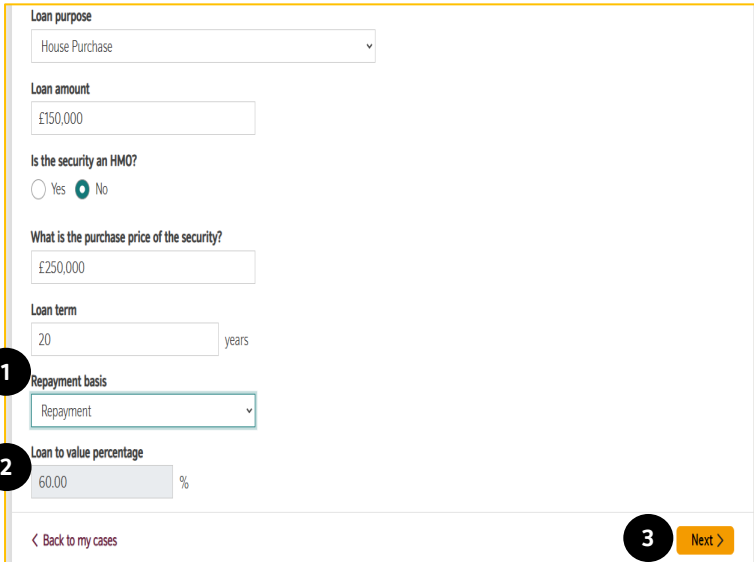
1. Illustrate a mortgage
2. Get a Decision in Principle

[To return to contents click here](#)

Illustration



1. Complete the loan details for the application:
 - Loan Purpose
 - Is the security an HMO?
 - Purchase price
 - Loan Amount
 - Loan Term



Loan purpose
House Purchase

Loan amount
£150,000

Is the security an HMO?
 Yes No

What is the purchase price of the security?
£250,000

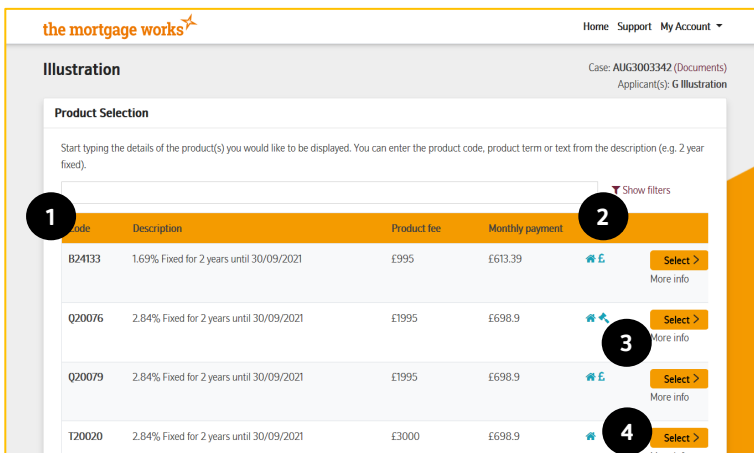
Loan term
20 years

1 Repayment basis
Repayment

2 Loan to value percentage
60.00 %

3 < Back to my cases Next >

1. Select the repayment basis for the mortgage
2. The LTV will calculate automatically
3. Click Next



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Illustration Case: AUG3003342 (Documents)
Applicant(s): G Illustration

Product Selection

Start typing the details of the product(s) you would like to be displayed. You can enter the product code, product term or text from the description (e.g. 2 year fixed).

1

2 Show filters

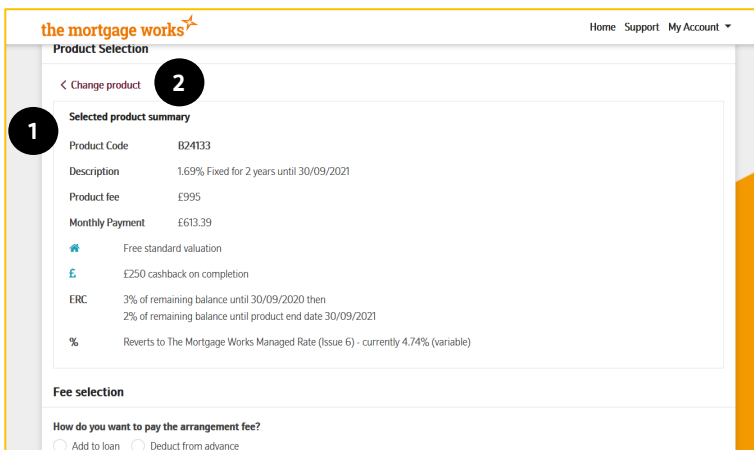
Product code	Description	Product fee	Monthly payment		
B24133	1.69% Fixed for 2 years until 30/09/2021	£995	£613.39		Select > More info
Q20076	2.84% Fixed for 2 years until 30/09/2021	£1995	£698.9		Select > More info
Q20079	2.84% Fixed for 2 years until 30/09/2021	£1995	£698.9		Select > More info
T20020	2.84% Fixed for 2 years until 30/09/2021	£3000	£698.9		Select >


3

4

On the product selection page you will be presented with all available products for your application.

1. Use the search bar to find your product
2. You can also use filters to reduce the number of products you can select from
3. Click 'More info' to see more information about the individual products
4. Click 'Select' next to the product you would like to produce an illustration for.



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Product Selection

< Change product 2

1 Selected product summary

Product Code B24133

Description 1.69% Fixed for 2 years until 30/09/2021

Product fee £995

Monthly Payment £613.39

Free standard valuation

£250 cashback on completion

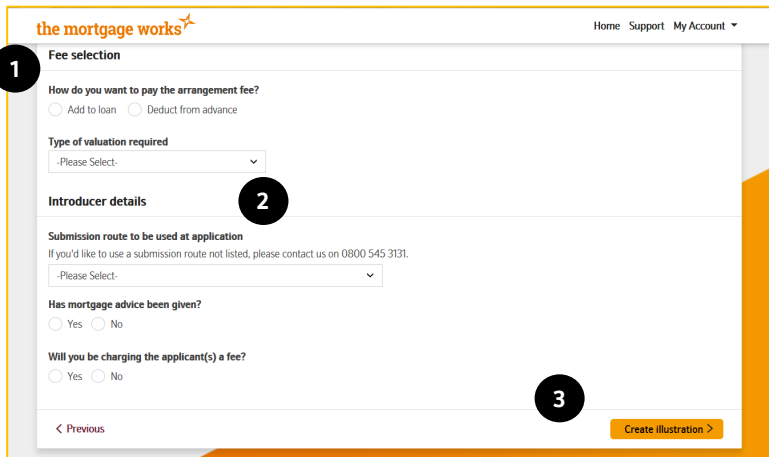
ERC 3% of remaining balance until 30/09/2020 then
2% of remaining balance until product end date 30/09/2021

% Reverts to The Mortgage Works Managed Rate (Issue 6) - currently 4.74% (variable)

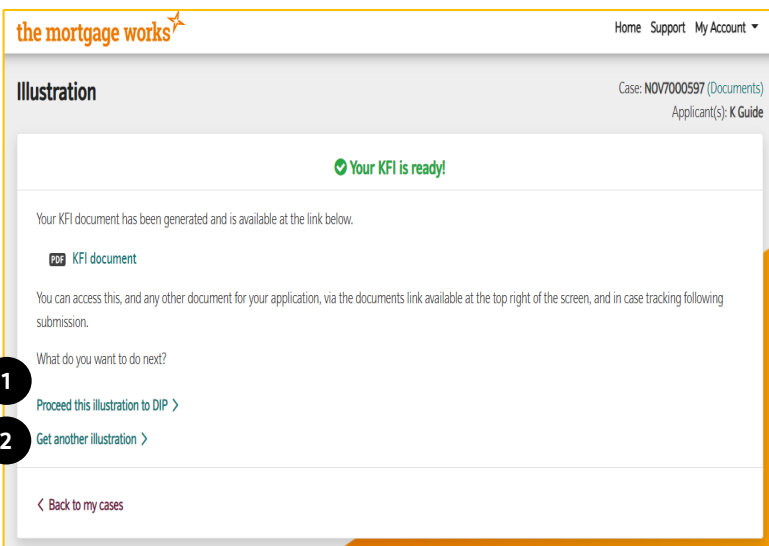
Fee selection

How do you want to pay the arrangement fee?
 Add to loan Deduct from advance

1. A summary of your chosen product will be displayed.
2. Change product will take you back to your list of products if you want to choose a different product



1. Answers questions detailing customer fees:-
 - How will the arrangement fee be paid
 - Type of valuation
2. Answer questions about your business and applicant interactions:-
 - Submission route to be used
 - Has Mortgage advice been given
 - Will you be charging the applicant a fee?
3. Click 'Create illustration'



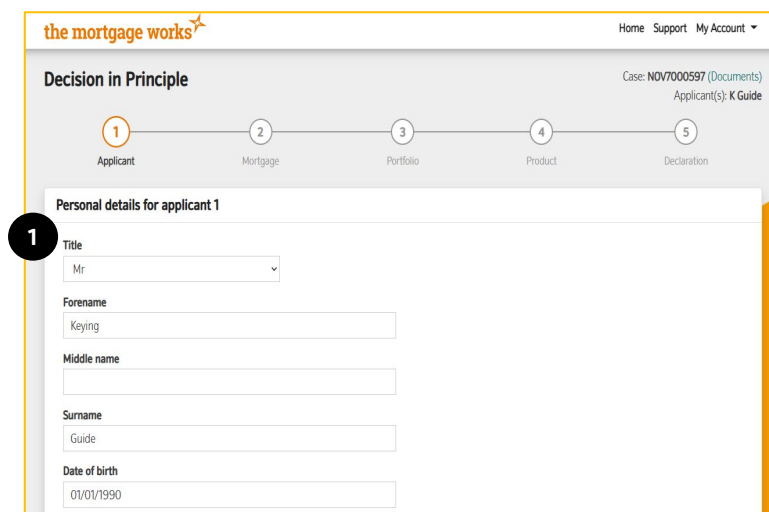
You will be presented with a link to open the produced illustration document.

From this page you can use the links to either:

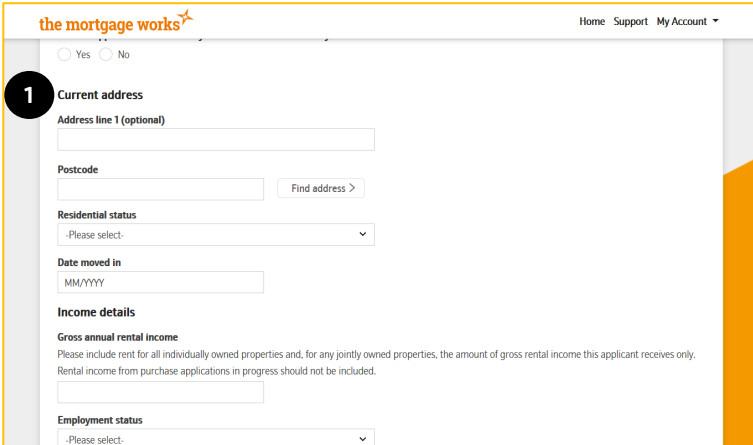
1. Proceed this illustration to a DIP – This will take you through the DIP screens using the information used in this illustration
2. Get another illustration – This will take you through the screens required to get an illustration

[To return to contents click here](#)

Decision in Principle



1. Complete all personal details for the applicant(s):-
 - Title
 - Forename
 - Middle Name (Optional)
 - Surname
 - Date of Birth
 - Gender
 - Nationality
 - Dual nationality (You will be asked to select the second nationality if one is required)
 - Country of birth
 - Previous Names



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Yes No

1 Current address

Address line 1 (optional)

Postcode

Residential status
-Please select-

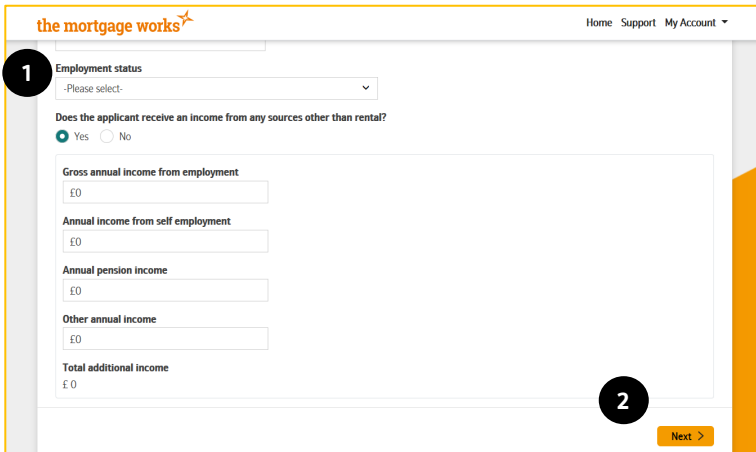
Date moved in
MM/YYYY

Income details

Gross annual rental income
Please include rent for all individually owned properties and, for any jointly owned properties, the amount of gross rental income this applicant receives only. Rental income from purchase applications in progress should not be included.

Employment status
-Please select-

- Complete the current address details for the applicant(s):-
 - Full address
 - Postcode
 - Residential status
 - Date moved in (if this was less than 3 years go you will be asked to enter previous addresses; a minimum of three years UK address history is required)



the mortgage works Home Support My Account

1 Employment status
-Please select-

Does the applicant receive an income from any sources other than rental?
 Yes No

Gross annual income from employment
£0

Annual income from self employment
£0

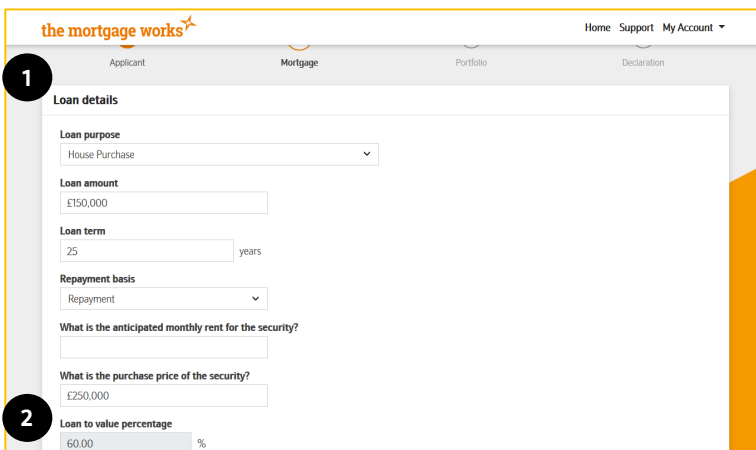
Annual pension income
£0

Other annual income
£0

Total additional income
£0

2

- Answer the income questions for your applicant:-
 - Gross annual rental income
 - Employment Status
 - Does the applicant receive income from any other sources
 - Amounts of other income (If required)
- Click 'Next'



the mortgage works Home Support My Account

Applicant Mortgage Portfolio Declaration

1 Loan details

Loan purpose
House Purchase

Loan amount
£150,000

Loan term
25 years

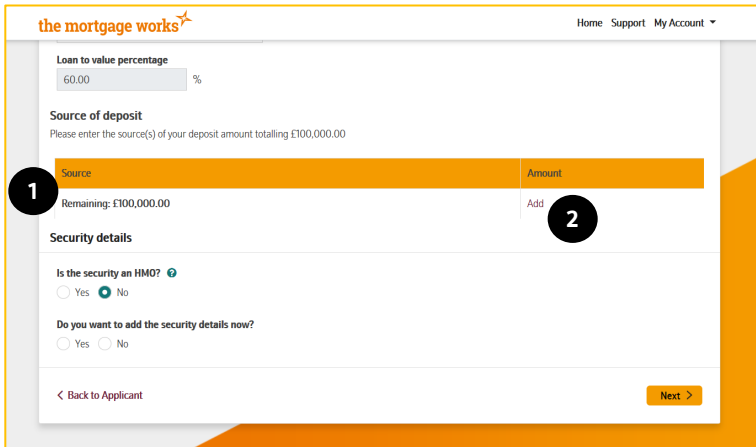
Repayment basis
Repayment

What is the anticipated monthly rent for the security?
£

What is the purchase price of the security?
£250,000

2 Loan to value percentage
60.00 %

- Answer the loan detail questions:-
 - Loan purpose
 - Loan amount
 - Loan term
 - Repayment basis
 - Anticipated monthly rental income
 - Purchase price
- The Loan to value should automatically calculate based on the information you have entered.



the mortgage works Home Support My Account

Loan to value percentage
60.00 %

Source of deposit
Please enter the source(s) of your deposit amount totalling £100,000.00

Source	Amount
Remaining: £100,000.00	Add

Security details

Is the security an HMO?

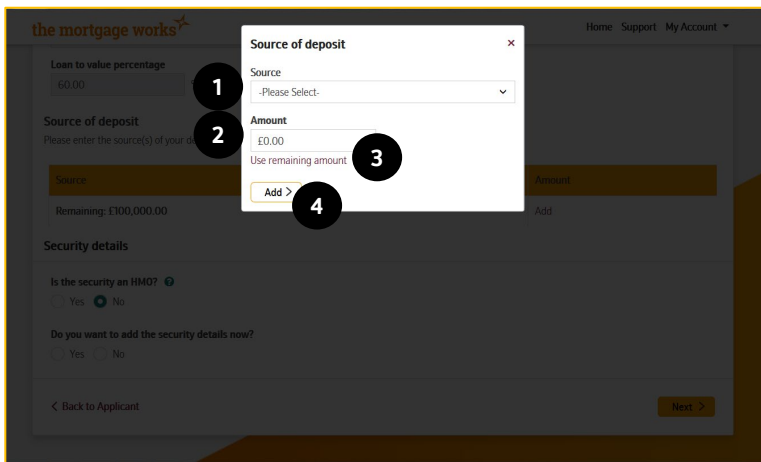
Yes No

Do you want to add the security details now?

Yes No

[Back to Applicant](#) **Next >**

1. The amount of deposit required will be displayed, automatically calculated using the loan amount and purchase price.
2. Enter a source of deposit by clicking 'Add'.



the mortgage works Home Support My Account

Loan to value percentage
60.00

Source of deposit
Please enter the source(s) of your deposit amount totalling £100,000.00

Source

Remaining: £100,000.00

Security details

Is the security an HMO?

Yes No

Do you want to add the security details now?

Yes No

[Back to Applicant](#) **Next >**

Source of deposit

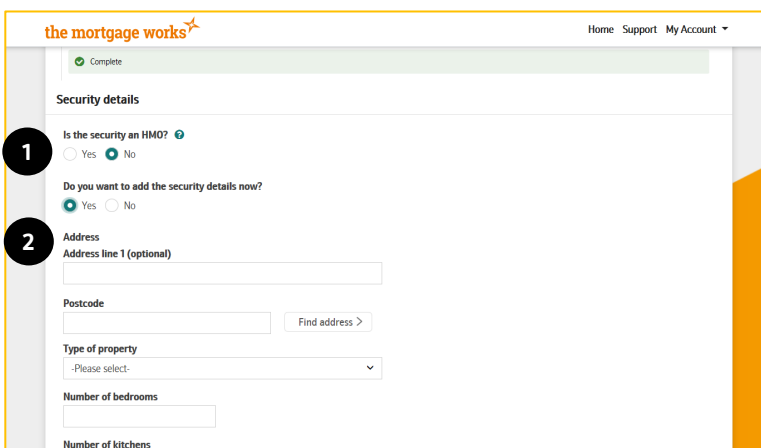
Source
-Please Select-

Amount
£0.00

Use remaining amount

Add >

1. A separate modal will open, use the drop-down box to choose the source of deposit.
2. Enter the amount from that source into the amount box.
3. Alternatively, or when adding additional sources, you can click 'Use remaining amount' to automatically populate the amount field with the remaining deposit amount still to be entered
4. Click 'Add' to input the deposit source into the table



the mortgage works Home Support My Account

✔ Complete

Security details

Is the security an HMO?

Yes No

Do you want to add the security details now?

Yes No

Address
Address line 1 (optional)

Postcode [Find address >](#)

Type of property
-Please select-

Number of bedrooms

Number of kitchens

1. Enter the security details:-
 - Is the security an HMO
 - Do you want to add security details now? (Purchase applications only, if you are keying a remortgage application, you will have to enter security details here)
2. If you answer yes to entering security details some additional questions will open so you can enter the security address. Alternatively, you can proceed without entering the details to get a Decision in Principle but you will be required to enter them later in the application process.

Portfolio overview

1 **What type of buyer is the applicant?**
 First time landlord Experienced landlord

Buy-to-let portfolio detail

Number of properties on completion
 Please confirm the number of buy-to-let properties on completion of this mortgage including:

- Those held in a limited company
- Any TMW purchase or let-to-buy applications in progress

2 **Mortgaged** **Unencumbered** 3
 Held by **Keying Guide** solely or jointly with someone else

4 [Back to Mortgage](#) [Next >](#)

1. Answer the 'What type of buyer is your applicant' question
2. Enter the number of mortgaged buy to let properties held by the applicant here
3. Enter the number of unencumbered buy to let properties held by the applicant here
4. If 4 or more is entered into the mortgaged box, you will now be asked to enter the total estimated value and total secured borrowing within your applicant's portfolio, if not, click 'Next'.

Decision in Principle Case: N0V7000597 (Documents)
Applicant(s): K Guide

Applicant Mortgage Portfolio **Product** Declaration

Product Selection

1 Start typing the details of the product(s) you would like to be displayed. You can enter the product code, product term or text from the description (e.g. 2 year fixed). [Show filters](#) 2

Code	Description	Product fee	Monthly payment	Features
B01684	3.74% Fixed for 1 year(s) until 30/11/2023	£1500	£888.55	3 Select > More info
B70774	Bank base rate + 0.64% Variable for 2 year(s) until 30/11/2024	£1995	£786.84	4 Select > More info

On the product selection page you will be presented with all available products for your application.

1. Use the search bar to find your product
2. You can also use filters to reduce the number of products you can select from
3. Click 'More Info' to see more information about the individual products
4. Click 'Select' next to the product you would like to produce an illustration for.

Product Selection

[Change product](#) 2

Selected product summary

Please note, the product will not be reserved at DIP. It will only be reserved upon submission of your Full Mortgage Application.

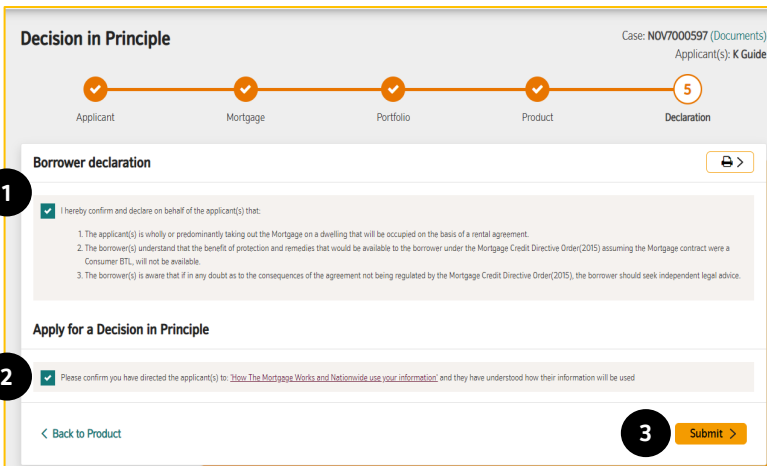
1 **Product Code** B252B9
Description 3.54% Fixed for 2 year(s) until 30/11/2023
Product fee £3000
Monthly Payment £873.03
ERC 2.00% of remaining balance until 30/11/2023 then 1.00% of remaining balance until product end date 30/11/2024
% Reverts to The Mortgage Works Managed Rate (Issue 6) - currently 5.74% (variable)

3 **Do you want to produce a KFI for this product?**
 Yes No

You won't be able to produce a KFI for this application after this point.

4 [Back to Portfolio](#) [Next >](#)

1. A summary of your chosen product will be displayed.
2. Change product will take you back to your list of products if you want to choose a different product
3. Answer the question to determine if a KFI is produced. *Please note you will not be able to produce a KFI for this application after this point.
4. Click Next



Decision in Principle Case: NOV7000597 (Documents)
Applicant(s): K Guide

Applicant Mortgage Portfolio Product Declaration 5

Borrower declaration

I hereby confirm and declare on behalf of the applicant(s) that:

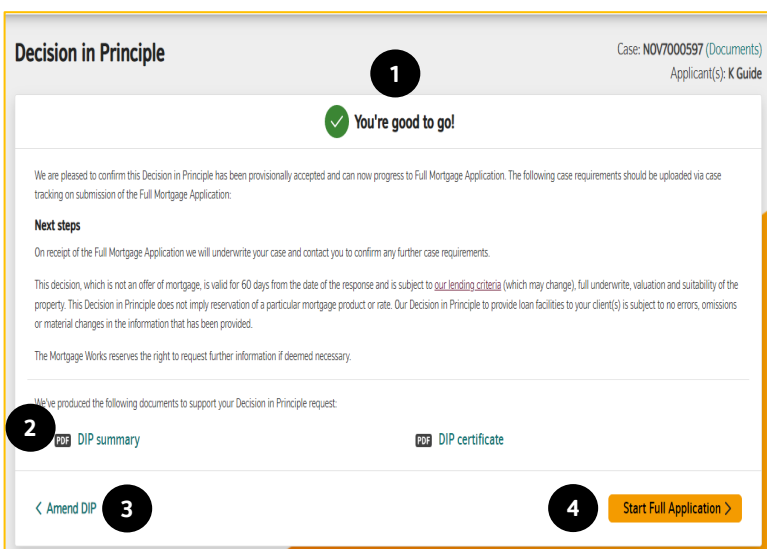
1. The applicant(s) is wholly or predominantly taking out the Mortgage on a dwelling that will be occupied on the basis of a rental agreement.
2. The borrower(s) understand that the benefit of protection and remedies that would be available to the borrower under the Mortgage Credit Directive Order(2015) assuming the Mortgage contract were a Consumer BTL, will not be available.
3. The borrower(s) is aware that if in any doubt as to the consequences of the agreement not being regulated by the Mortgage Credit Directive Order(2015), the borrower should seek independent legal advice.

Apply for a Decision in Principle


Please confirm you have directed the applicant(s) to ["How The Mortgage Works and Nationwide use your information"](#) and they have understood how their information will be used

[Back to Product](#) **3** [Submit](#)

1. Read and tick to confirm the borrow declaration on behalf of your applicant
2. Read and confirm the applicants understand how their information will be used
3. Click 'Submit' to apply for a Decision in Principle



Decision in Principle Case: NOV7000597 (Documents)
Applicant(s): K Guide

1  **You're good to go!**

We are pleased to confirm this Decision in Principle has been provisionally accepted and can now progress to Full Mortgage Application. The following case requirements should be uploaded via case tracking on submission of the Full Mortgage Application.



Next steps

On receipt of the Full Mortgage Application we will underwrite your case and contact you to confirm any further case requirements.

This decision, which is not an offer of mortgage, is valid for 60 days from the date of the response and is subject to [our lending criteria](#) (which may change), full underwrite, valuation and suitability of the property. This Decision in Principle does not imply reservation of a particular mortgage product or rate. Our Decision in Principle to provide loan facilities to your client(s) is subject to no errors, omissions or material changes in the information that has been provided.

The Mortgage Works reserves the right to request further information if deemed necessary.

We've produced the following documents to support your Decision in Principle request:

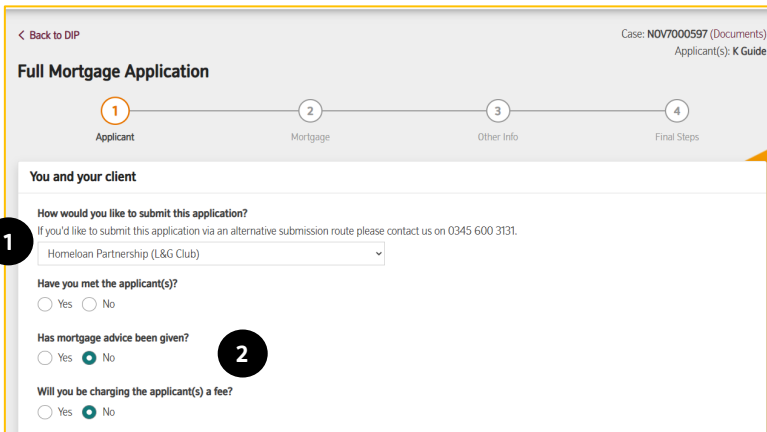
2  [DIP summary](#)  [DIP certificate](#)

[Amend DIP](#) **3** **4** [Start Full Application](#)

1. You will be given your decision at the top of the page
2. You can access the DIP Capture Summary document and DIP certificate document at the bottom of the page.
3. Click 'Amend DIP' to go back through the DIP screens
4. Alternatively, you can go straight into the Full application

[To return to contents click here](#)

Full Mortgage Application



Case: NOV7000597 (Documents)
Applicant(s): K Guide

1 Applicant 2 Mortgage 3 Other Info 4 Final Steps

You and your client

How would you like to submit this application?
If you'd like to submit this application via an alternative submission route please contact us on 0345 600 3131.

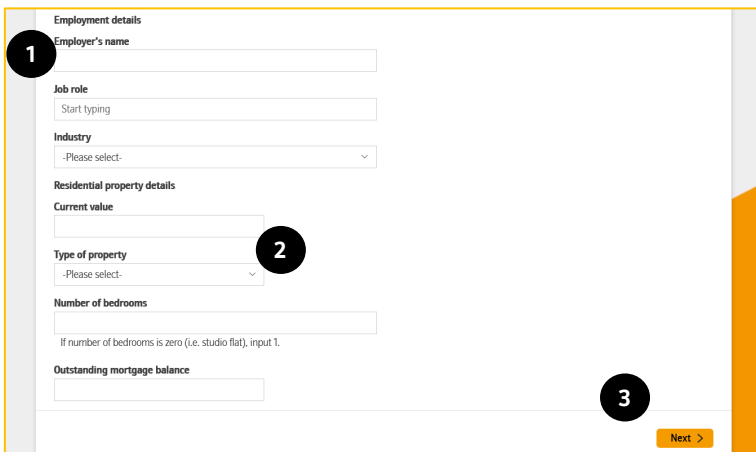
1

Have you met the applicant(s)?
 Yes No

Has mortgage advice been given?
 Yes No 2

Will you be charging the applicant(s) a fee?
 Yes No

1. Select the submission route you are submitting this application through
2. Answer questions about your clients and fees



Employment details

1

Job role

Industry

Residential property details

Current value

Type of property
 2

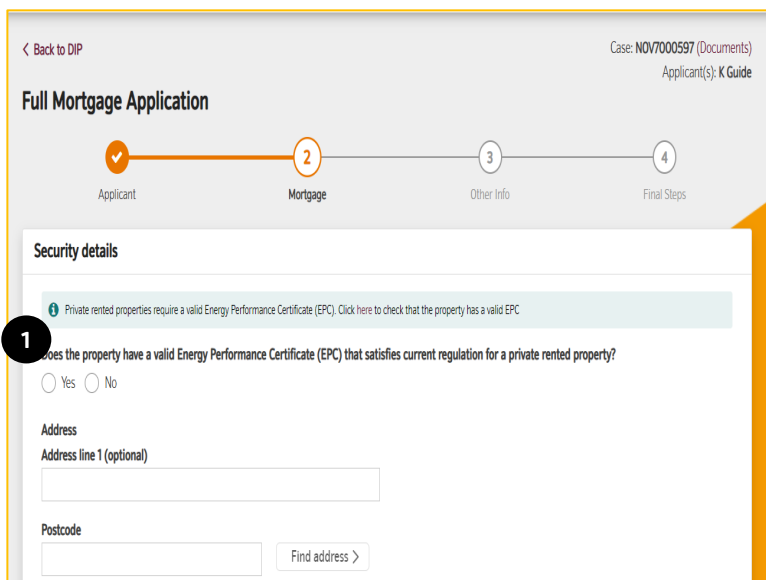
Number of bedrooms

If number of bedrooms is zero (i.e. studio flat), input 1.

Outstanding mortgage balance

3

1. Answer additional questions about the applicants employment
2. Answer questions about the applicants residential property
3. Click Next



Case: NOV7000597 (Documents)
Applicant(s): K Guide

1 Applicant 2 Mortgage 3 Other Info 4 Final Steps

Security details

1

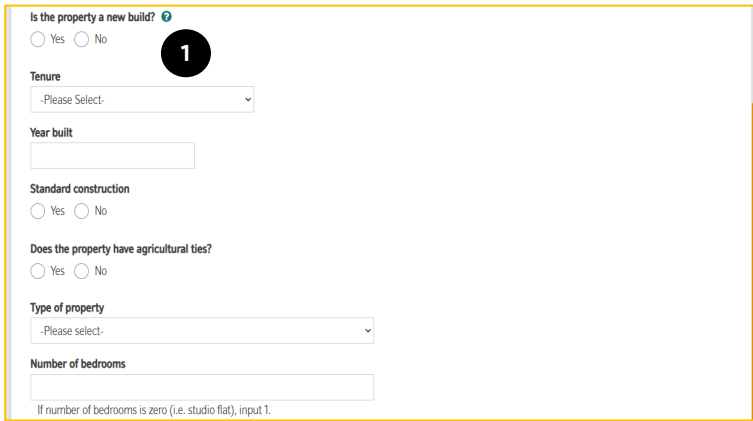
Does the property have a valid Energy Performance Certificate (EPC) that satisfies current regulation for a private rented property?
 Yes No


Address

Address line 1 (optional)

Postcode

1. If you chose not to enter security details in Decision in Principle, you will now be asked to enter them.



Is the property a new build? 

Yes No

Tenure

Year built

Standard construction

Yes No

Does the property have agricultural ties?

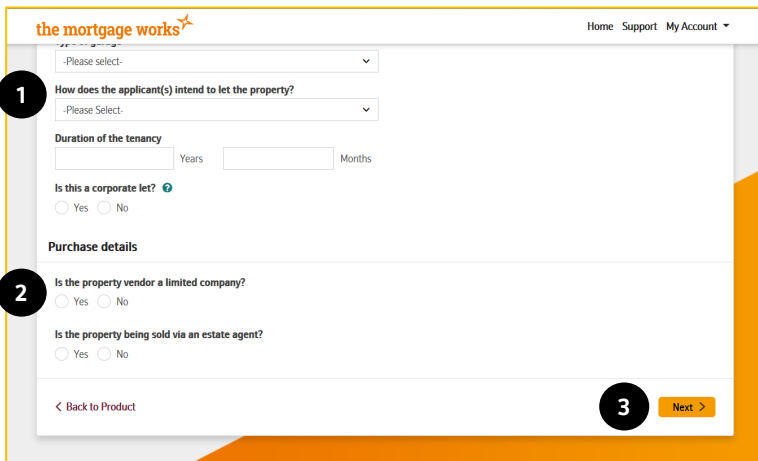
Yes No


Type of property

Number of bedrooms

If number of bedrooms is zero (i.e. studio flat), input 1.

1. Answer additional questions about the security address




the mortgage works  Home Support My Account

1 How does the applicant(s) intend to let the property?

Duration of the tenancy

Years Months

Is this a corporate let? 

Yes No

Purchase details

2 Is the property vendor a limited company?

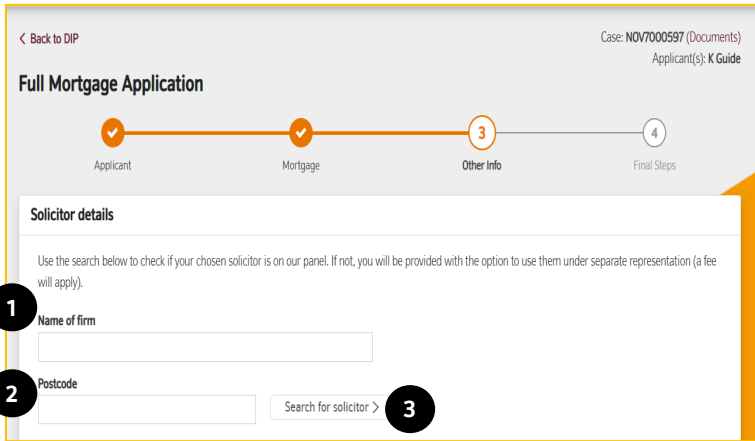
Yes No

Is the property being sold via an estate agent?

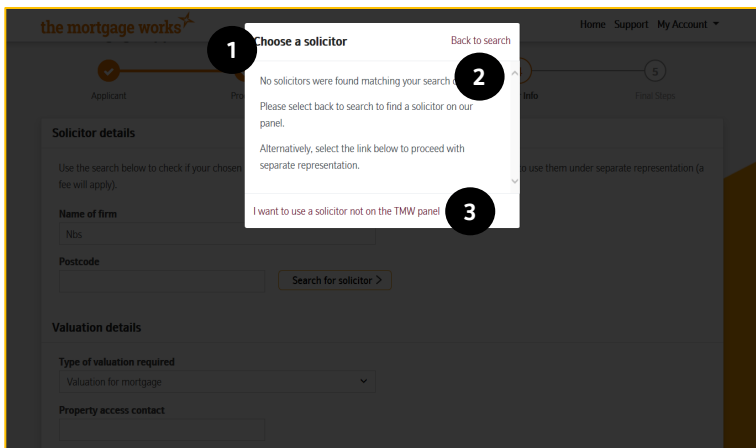
Yes No

[Back to Product](#) **3** [Next](#)

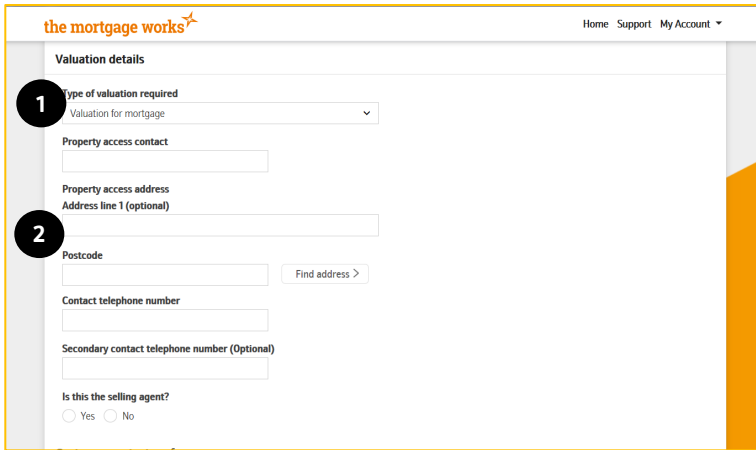
1. Answer questions about the tenancy
2. Answer additional questions about the purchase/remortgage
3. Click Next



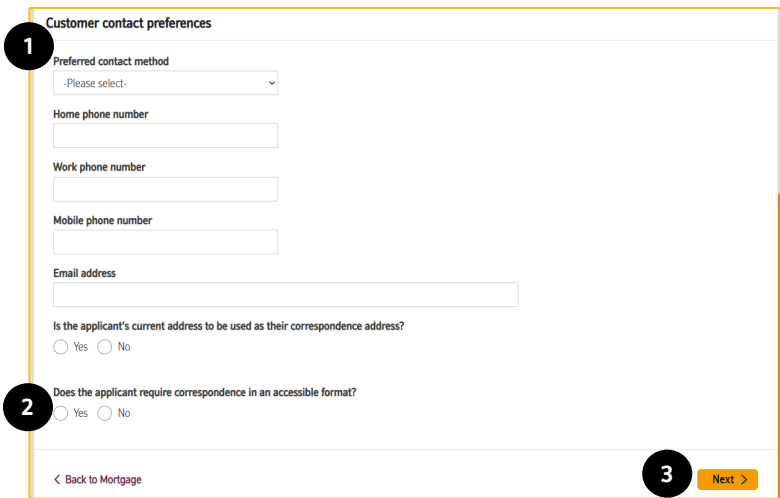
1. Enter name of solicitor firm
2. Enter solicitor postcode
3. Click Search for solicitor



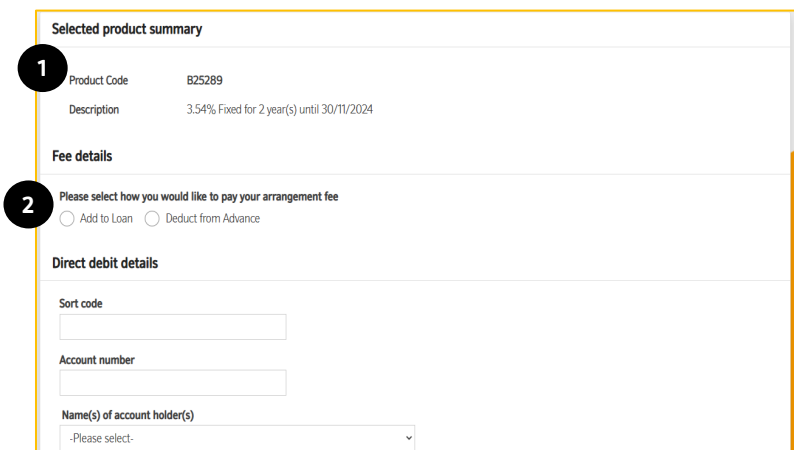
1. A new modal will open displaying the search results, Click the solicitor the applicants wish to use, the information will be pulled through on to the previous page including address and contact details
2. Click Back to search to change the search criteria and try again
3. If no search results are displayed and the applicants wish to use a solicitor not on our panel, click here. This will take you to a page where you can enter the solicitor's information.



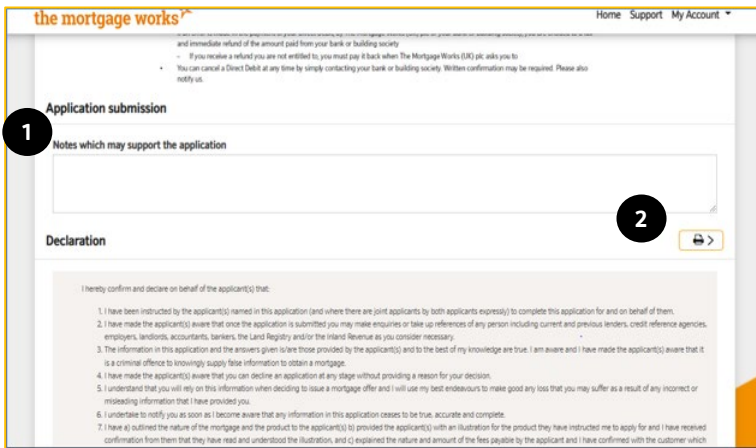
1. Select the type of valuation required
2. Enter property access details



1. Answer questions about the customers contact preferences
2. Select any accessible communication requirements
3. Click Next



1. Summary of product selected
2. Confirm how you would like to pay the fee
3. Fill in Direct Debit Details



Application submission

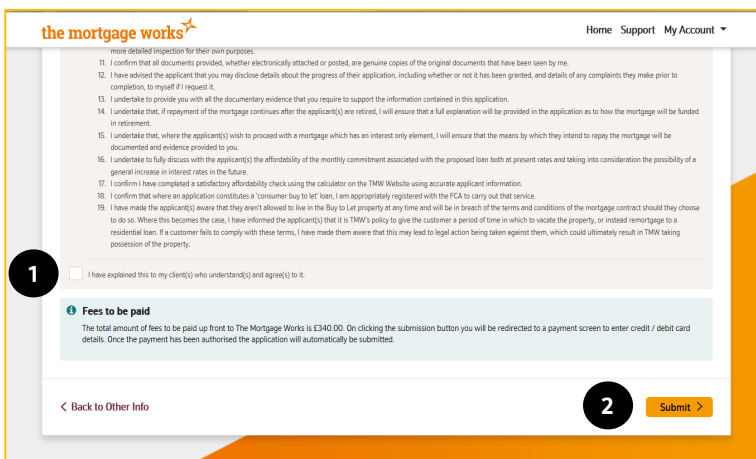
Notes which may support the application

Declaration

I hereby confirm and declare on behalf of the applicant(s) that:

1. I have been instructed by the applicant(s) named in this application (and where there are joint applicants by both applicants expressly) to complete this application for and on behalf of them.
2. I have made the applicant(s) aware that once the application is submitted you may make enquiries or take up references of any person including current and previous lenders, credit reference agencies, employers, landlords, accountants, bankers, the Land Registry and/or the Inland Revenue as you consider necessary.
3. The information in this application and the answers given to here those provided by the applicant(s) and to the best of my knowledge are true. I am aware and I have made the applicant(s) aware that it is a criminal offence to knowingly supply false information to obtain a mortgage.
4. I have made the applicant(s) aware that you can decline an application at any stage without providing a reason for your decision.
5. I understand that you will rely on this information when deciding to issue a mortgage offer and I will use my best endeavours to make good any loss that you may suffer as a result of any incorrect or misleading information that I have provided you.
6. I undertake to notify you as soon as I become aware that any information in this application ceases to be true, accurate and complete.
7. I have explained the nature of the mortgage and the product to the applicant(s) (I provided the applicant(s) with an illustration for the product they have instructed me to apply for and I have received confirmation from them that they have read and understood the illustration, and I explained the nature and amount of the fees payable by the applicant and I have confirmed with the customer which

1. You have the opportunity here to enter notes which may support the application
2. You can print the declaration here if you wish to print it



more detailed inspection for their own purposes.

11. I confirm that all documents provided, whether electronically attached or posted, are genuine copies of the original documents that have been seen by me.
12. I have advised the applicant that you may disclose details about the progress of their application, including whether or not it has been granted, and details of any complaints they make prior to completion, to myself if I request it.
13. I undertake to provide you with all the documentary evidence that you require to support the information contained in this application.
14. I undertake that, if repayment of the mortgage continues after the applicant(s) are retired, I will ensure that a full explanation will be provided in the application as to how the mortgage will be funded in retirement.
15. I undertake that, where the applicant(s) wish to proceed with a mortgage which has an interest only element, I will ensure that the means by which they intend to repay the mortgage will be documented and evidence provided to you.
16. I undertake to fully discuss with the applicant(s) the affordability of the monthly commitment associated with the proposed loan both at present rates and taking into consideration the possibility of a general increase in interest rates in the future.
17. I confirm I have completed a satisfactory affordability check using the calculator on the TMW Website using accurate applicant information.
18. I confirm that where an application constitutes a consumer buy to let loan, I am appropriately registered with the FCA to carry out that service.
19. I have made the applicant(s) aware that they aren't allowed to live in the Buy to Let property at any time and will be in breach of the terms and conditions of the mortgage contract should they choose to do so. Where this becomes the case, I have informed the applicant(s) that it is TMW's policy to give the customer a period of time in which to vacate the property, or instead remortgage to a residential loan. If a customer fails to comply with these terms, I have made them aware that this may lead to legal action being taken against them, which could ultimately result in TMW taking possession of the property.

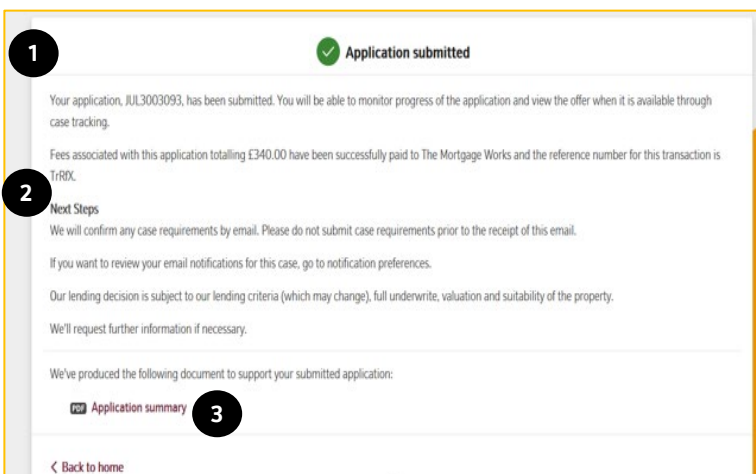
I have explained this to my client(s) who understand(s) and agree(s) to it.

Fees to be paid

The total amount of fees to be paid up front to The Mortgage Works is £340.00. On clicking the submission button you will be redirected to a payment screen to enter credit / debit card details. Once the payment has been authorised the application will automatically be submitted.

[Back to Other Info](#) **Submit**

1. Tick to confirm you have read and understood the declaration
2. Click submit. This will direct you to payment screens where you will be prompted to enter payment card information to pay any applicable fees.



Application submitted

Your application, JUL3003093, has been submitted. You will be able to monitor progress of the application and view the offer when it is available through case tracking.

Fees associated with this application totalling £340.00 have been successfully paid to The Mortgage Works and the reference number for this transaction is TrRX.

Next Steps

We will confirm any case requirements by email. Please do not submit case requirements prior to the receipt of this email.

If you want to review your email notifications for this case, go to notification preferences.

Our lending decision is subject to our lending criteria (which may change), full underwrite, valuation and suitability of the property.

We'll request further information if necessary.

We've produced the following document to support your submitted application:

[Application summary](#)

[Back to home](#)

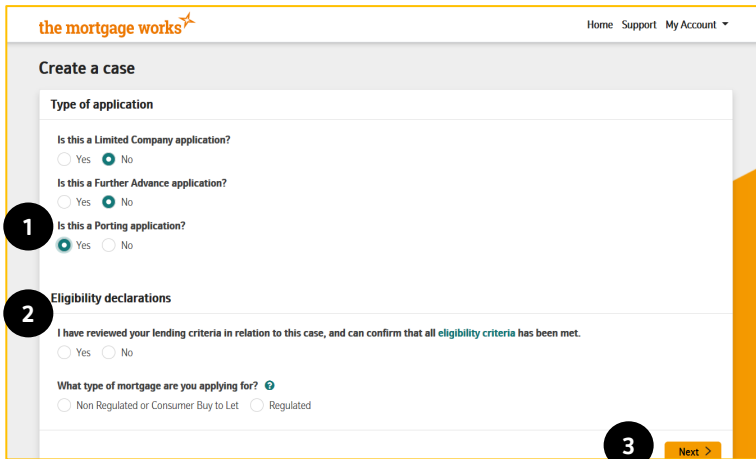
1. You will get confirmation that the application has been submitted
2. You will be advised of next steps
3. You can open the Application Summary here, but can also locate it in your case tracking

[To return to contents click here](#)

Porting Application

The following pages will show you the screens and questions specific to a porting application, for all other screens, please refer to the relevant section of this keying guide.

Create Case



the mortgage works Home Support My Account ▾

Create a case

Type of application

Is this a Limited Company application?
 Yes No

Is this a Further Advance application?
 Yes No

1 Is this a Porting application?
 Yes No

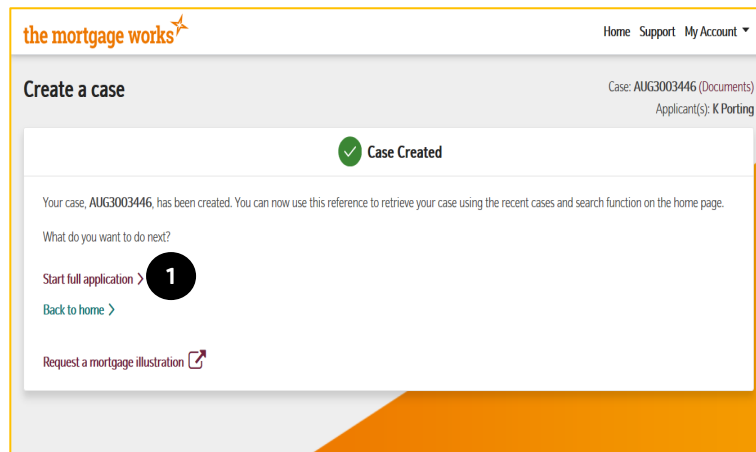
2 Eligibility declarations

I have reviewed your lending criteria in relation to this case, and can confirm that all eligibility criteria has been met.
 Yes No

What type of mortgage are you applying for? ⓘ
 Non Regulated or Consumer Buy to Let Regulated

3 Next >

1. Answer the type of application questions, ensuring you select 'Yes' to the porting application question
2. Answer the eligibility declarations
3. Click Next



the mortgage works Home Support My Account ▾

Create a case Case: AUG3003446 (Documents)
Applicant(s): K Porting

✓ Case Created

Your case, AUG3003446, has been created. You can now use this reference to retrieve your case using the recent cases and search function on the home page.

What do you want to do next?

Start full application > 1

Back to home >

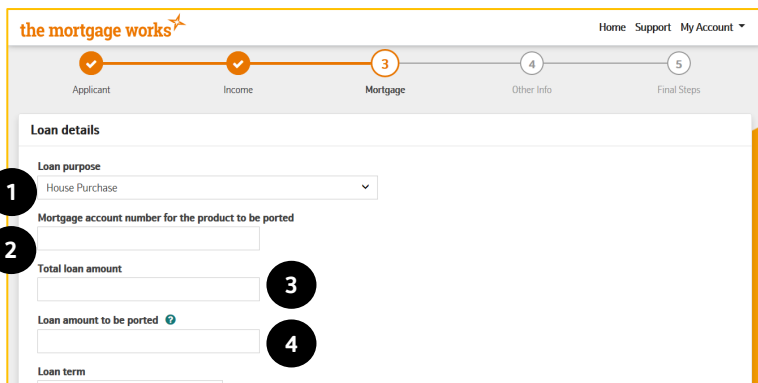
Request a mortgage illustration ⓘ

You cannot complete a Decision in Principle for a porting application, you need to go straight into the full application.

1. Click Start full application

[To return to contents click here](#)

Full Application



The screenshot shows the 'Full Application' form with a progress bar at the top indicating five steps: Applicant, Income, Mortgage, Other info, and Final Steps. The 'Mortgage' step is currently active. The form fields are:

- 1. Loan purpose (dropdown menu, currently set to 'House Purchase')
- 2. Mortgage account number for the product to be ported (text input)
- 3. Total loan amount (text input)
- 4. Loan amount to be ported (text input)
- Loan term (text input)

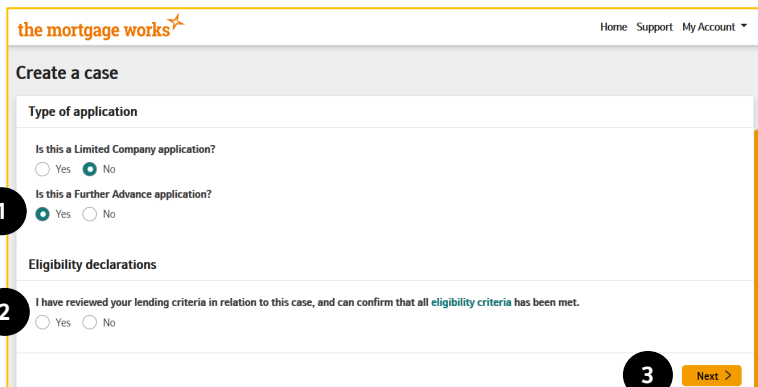
1. Select Loan purpose
2. Enter Mortgage account number
3. Enter loan amount
4. Enter loan amount to be ported

[Click here to return to contents](#)

Further Advance Application

The following pages will show you the screens and questions specific to a further advance application, for all other screens, please refer to the relevant section of this keying guide.

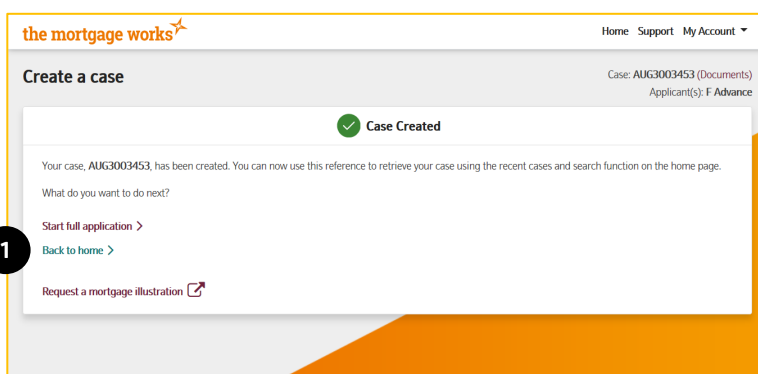
Create Case




The screenshot shows the 'Create a case' form with the following sections and callouts:

- 1. Type of application:
 - Is this a Limited Company application? (Radio buttons: Yes, No - 'No' is selected)
 - Is this a Further Advance application? (Radio buttons: Yes, No - 'Yes' is selected)
- 2. Eligibility declarations:
 - I have reviewed your lending criteria in relation to this case, and can confirm that all eligibility criteria has been met. (Radio buttons: Yes, No - 'Yes' is selected)
- 3. A 'Next >' button is located at the bottom right of the form.

1. Answer the type of application questions, ensuring you select 'Yes' to the Further Advance application question
2. Answer the eligibility declarations
3. Click Next



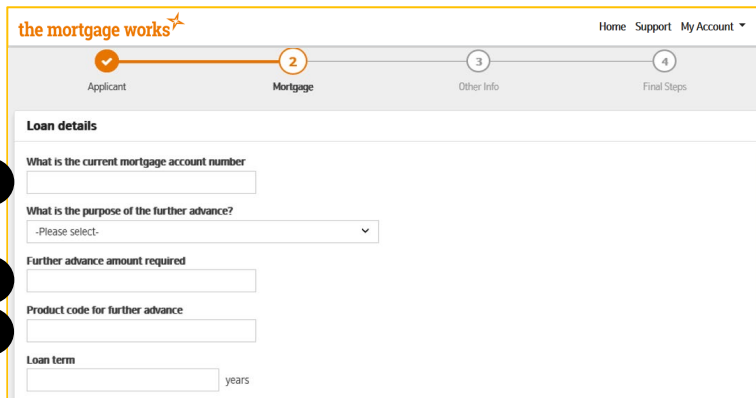
The screenshot shows a confirmation screen titled 'Create a case' with a green checkmark and the text 'Case Created'. Below this, it states: 'Your case, AUG3003453, has been created. You can now use this reference to retrieve your case using the recent cases and search function on the home page.' It then asks 'What do you want to do next?' and provides three options:

- 1. Start full application >
- Back to home >
- Request a mortgage illustration 

You cannot complete a Decision in Principle for a further advance application, you need to go straight into the full application.

1. Click Start Full application

Full Application



1. Enter current mortgage account number
2. Enter further advance amount required
3. Enter product code for further advance

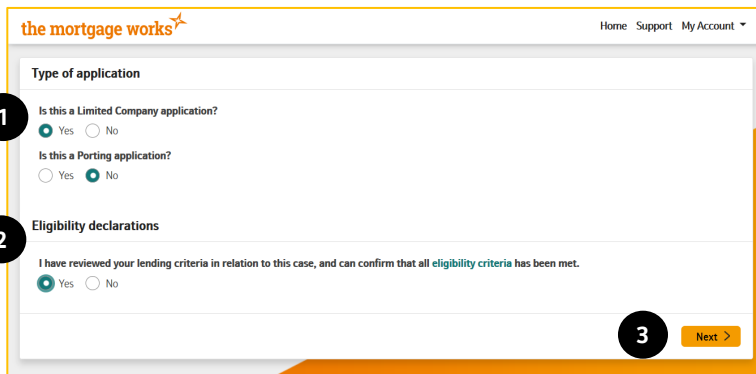
Continue completing the full application process and submit

[Click here to return to contents](#)

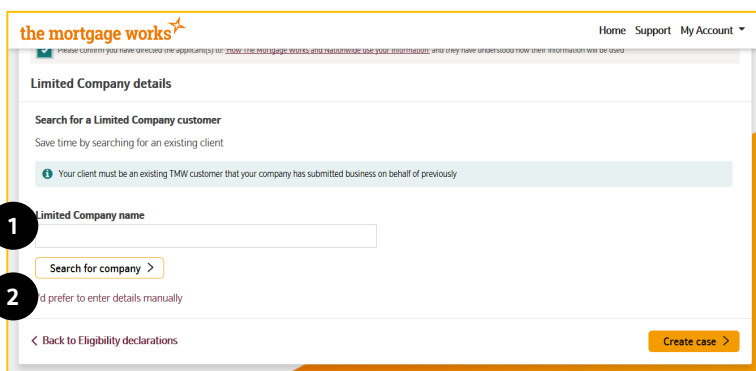
Limited Company Application

The following pages will show you the screens and questions specific to a Limited Company application, for all other screens, please refer to the relevant section of this keying guide.

Create Case

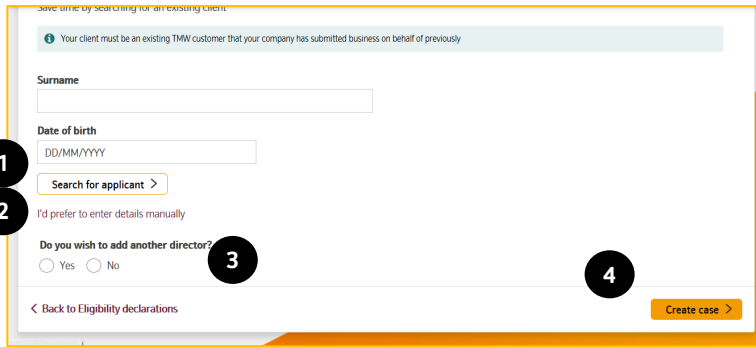


1. Answer the type of application questions ensuring you select yes to the Limited Company application
2. Confirm the eligibility declarations
3. Click Next



1. Search for an existing Limited Customer company that your firm has used before, or
2. Enter details manually

For Intermediary use only



Save time by searching for an existing client

Your client must be an existing TMW customer that your company has submitted business on behalf of previously

Surname

Date of birth

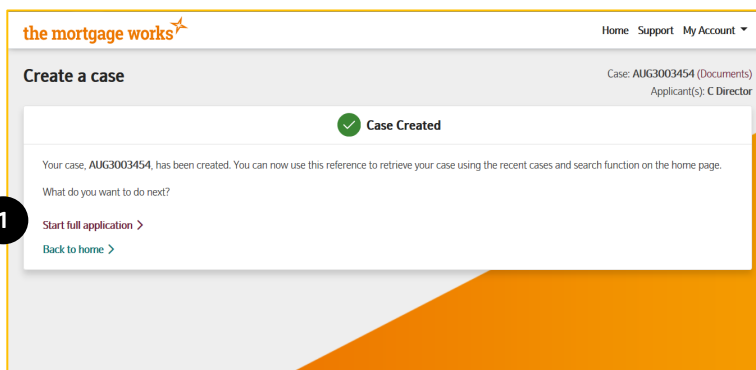
I'd prefer to enter details manually

Do you wish to add another director? Yes No

1. Search for a company director your company has used for, or
2. Enter the details manually
3. If you wish to add a second company director, select yes and follow the above steps
4. Click Create case

[Click here to return to contents](#)

Full Application



the mortgage works Home Support My Account

Create a case Case: AUG3003454 (Documents)
Applicant(s): C Director

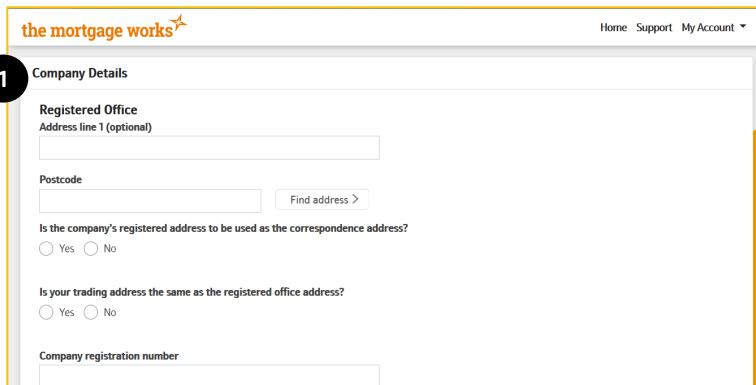
Case Created

Your case, AUG3003454, has been created. You can now use this reference to retrieve your case using the recent cases and search function on the home page.

What do you want to do next?

You cannot complete a Decision in Principle for a Limited Company application, you need to go straight into the full application.

1. Click Start full application



the mortgage works Home Support My Account

1 Company Details

Registered Office

Address line 1 (optional)

Postcode

Is the company's registered address to be used as the correspondence address?
 Yes No

Is your trading address the same as the registered office address?
 Yes No

Company registration number

1. Complete the company details including:-
 - Registered office address
 - Correspondence address
 - Trading address
 - Registration number
 - Telephone Number
 - SPV questions
 - Nature of Business
 - Incorporation Date

1

Personal details

Gender
 Female Male

Nationality
-Please select-

Does the applicant have dual nationality?
 Yes No

Country of birth
-Please select-

Has the applicant been known by another name in the last 3 years?
 Yes No

1. Enter company director details including:-
 - Gender
 - Nationality
 - Country of Birth
 - Previous name (if applicable)
 - Current address
 - Residential Status
 - Contact preferences
2. Continue with the full application process and submit.

[Click here to return to contents](#)