

# TMW Online - Scan and Attach Guide



For Intermediary Use Only

**My Cases**

Search Filters

TMW Online Case ID:  Activate Case ID:  Created Date:  Client(s):  Status:  Security Address:

SET DEFAULT ALERT PREFERENCES SEARCH

**Case List** Denotes there is an outstanding action required from you in order to progress the case.

ID	Created Date	Customer Names	Status	Security Address	Actions
JUN1810336	2016-06-23 10:02		Application Pre-Submission		<a href="#">Open</a> <a href="#">Cancel</a> <a href="#">Clone</a>
15229476	2016-05-16 14:08		Application Declined		<a href="#">Open</a> <a href="#">Clone</a>
15106261	2016-03-03 12:26		Offer Issued		<a href="#">Open</a> <a href="#">Clone</a>
15029305	2016-02-11 16:22		Application Submitted		<a href="#">Open</a> <a href="#">Clone</a> <span style="color: red;">!</span>
15164450	2016-04-13 12:57		Application Under Assessment		<a href="#">Open</a> <a href="#">Clone</a>
14961738	2016-01-20 14:29		Application Submitted		<a href="#">Open</a> <a href="#">Clone</a>

[Return](#)

On the 'My Cases' screen you'll see an exclamation mark which denotes information is required to progress your client's case.

15:22 Wednesday 30th August 2017  
This website is for use by professional intermediaries only  
Help Save Home Change Password Log Off

Application Reference: A1G1013133

**Outstanding Case Requirements**

Decision In Principle:  Application Form:  Case Summary:  Case Activity:  Outstanding Case Requirements:  Valuation Activity:  Documents:  Case Alert Options:  KFI:

Application Ref:  Status: Application Under Assessment

Applicant 1:  Applicant 2: N/A

Created Date: 25/08/2017

Product: B23388 - 2 Year Fixed Rate with 2% Arrangement Fee and £150 Application Fee

Security Address:

**Outstanding Requirements**

Outstanding Case Requirements Help Text Placeholder

Name	Description	Additional Notes	Date Added	
Latest 3 months bank statements for applic...	Please provide 3 months' bus	<a href="#">see more</a>	25/08/2017 14:59:00	<input checked="" type="checkbox"/>

[Respond to Requirement\(s\)](#)

You'll be able to attach one or more scanned documents to a requirement, eliminating the need to email or fax proofs.

In this example, you can tick the select box for 'Latest 3 months bank statements' and attach the relevant information by selecting;

[Respond to Requirements\(s\)](#)

**Online Response to Case Requirements** x

To upload a document, please select Browse and choose the file you require.

Please note, if you have selected more than one requirement, you will be limited to only one file to upload.

Please ensure any 16 digit card numbers are hidden before uploading any documents or entering comments

Browse to the document(s) you intend to upload

Upload Document(s)  [Browse...](#)

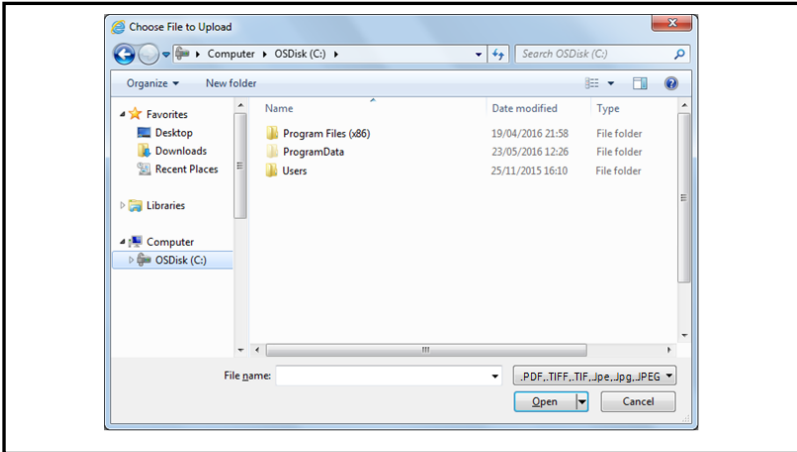
If you have any comments relating to the case requirement(s), please enter them in the box provided.

Comment:

[Cancel](#) [Submit](#)

You'll then be presented with the following screen. Select 'Browse' and a new window will open, you'll then be able to attach the document(s) saved on your computer.

You can add comments to assist our underwriters or satisfy case requirements too.

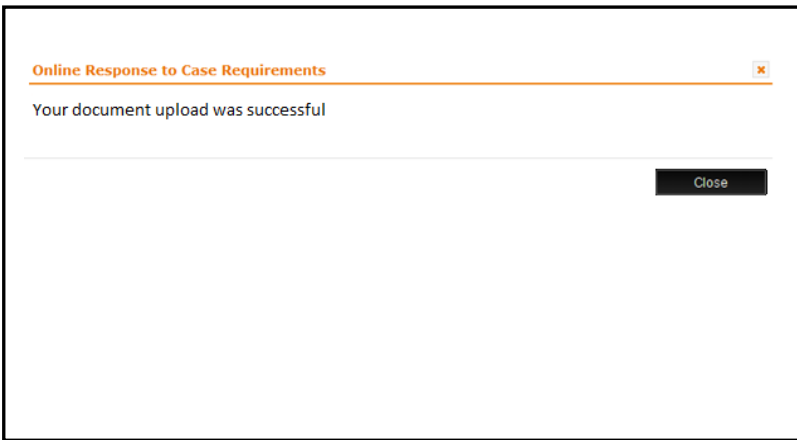


Navigate to the relevant folder, select the file(s) to attach and then select 'Open'.

When attaching multiple files to satisfy one requirement, the files must be in the same folder.

Your scanned documents must be saved as one of the following file extensions - TIF, TIFF, XLSX, jpe, jpg, jpeg, pdf.

**NB** - If your proof is over 5MB in size, split the document into smaller sections and attach each part individually. You can submit a maximum of 4 items per proof up to a maximum of 20MB.



Once the document is successfully attached you'll receive confirmation and can return to the 'Case Requirements' screen by clicking 'Close'.

When attached the requirement will be removed from the 'Outstanding Case Requirements' screen.