

TMW Online

Case Tracking Guide

My Cases / Cases for Office


1. The exclamation mark shows cases that need action/ have an outstanding requirement.
2. **Status** tells you the stage the application is at.
3. If you'd like to see more information on the application status click **Open**. If you would like to submit an application for the same applicants you can click clone.




My Cases

Search Filters

TMW Online Case ID <input type="text"/>	Activate Case ID <input type="text"/>	Created Date <input type="text"/>	Client(s) <input type="text"/>	Status All Cases <input type="button" value="v"/>	Security Address <input type="text"/>
<input type="button" value="SET DEFAULT ALERT PREFERENCES"/>					<input type="button" value="SEARCH"/>

Case List

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

Id	Created Date	Customer Names	2 Status	Security Address	Actions	1 
JUN1810336	2016-06-23 10:02	[REDACTED]	Application Pre-Submission	[REDACTED]	3 Open Cancel Clone	
15229476	2016-05-16 14:08	[REDACTED]	Application Declined	[REDACTED]	Open Clone	
15106261	2016-03-03 12:26	[REDACTED]	Offer Issued	[REDACTED]	Open Clone	
15029305	2016-02-11 16:22	[REDACTED]	Application Submitted	[REDACTED]	Open Clone	
15164450	2016-04-13 12:57	[REDACTED]	Application Under Assessment	[REDACTED]	Open Clone	
14961738	2016-01-20 14:29	[REDACTED]	Application Submitted	[REDACTED]	Open Clone	

Cases Activity

1. **Case Summary** enables you to view information about the selected case such as valuation activity and outstanding case requirements.

Application Reference: JUN1810070

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Application Form</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">1 Case Summary</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Case Activity</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Outstanding Case Requirements</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Valuation Activity</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Documents</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Case Alert Options</div> <div style="border: 1px solid #ccc; padding: 5px;">KFI</div>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <h3>Case Activity</h3> <div style="text-align: right;">Status: Case Created</div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Application Ref: JUN1810070</p> <p>Applicant 1: Miss Test Application</p> <p>Applicant 2: N/A</p> <p>Product: N/A</p> <p>Security:</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Case Activity</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Event Description</th> <th style="text-align: left;">Date</th> </tr> </thead> <tbody> <tr> <td>Case JUN1810070 Submitted</td> <td>17 June 2016 14:57</td> </tr> <tr> <td>Further Advance Application Summary</td> <td>17 June 2016 14:57</td> </tr> <tr> <td>Application Pre-Submission</td> <td>17 June 2016 14:54</td> </tr> <tr> <td>Case Created</td> <td>17 June 2016 14:45</td> </tr> </tbody> </table> </div>	Event Description	Date	Case JUN1810070 Submitted	17 June 2016 14:57	Further Advance Application Summary	17 June 2016 14:57	Application Pre-Submission	17 June 2016 14:54	Case Created	17 June 2016 14:45
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Outstanding Case Requirements

- 1 Our underwriters add notes displayed here on outstanding requirements such as 'the evidence of deposit has been submitted however did not satisfy the full amount of £40,000'.
2. You can respond to the requirements and notes by clicking here. You can send the outstanding documents and use free type text to respond.

Once you have responded it'll no longer display as outstanding, but you can view the details in the case activity screen.

Application Reference: JUN1810178

Status: Application Under Assessment

Outstanding Case Requirements

Application Ref: JUN1810070
 Applicant 1: Miss Test Application
 Applicant 2: N/A
 Product: 2 Year Fixed Rate with £1995 Arrangement Fee and £150 Application Fee
 Security:

Outstanding Requirements

Outstanding Case Requirements Help Text Placeholder

Name	Description	Additional Notes	Date Added	
Evidence of the gifted deposit donor's fu...	Awaiting evidence of the gifted deposit d...	\paperh15840 L35	21/06/2016 12:24:46	<input type="checkbox"/>
Non-standard case requirement - see no...	Awaiting non-standard case requirement...	\paperh15840 Hello-Task	21/06/2016 05:30:57	<input type="checkbox"/>

1

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

Valuation Activity

1. Here you can see the valuation assessment and activity.

Application Reference: JUN1809917

Status: Offer Issued

Valuation Activity

Application Ref: JUN1810070
 Applicant 1: Miss Test Application
 Applicant 2: N/A
 Product: TMW Lifetime Variable Rate with no upfront fees
 Security:

Valuation Activity

Event Description	Date
Assessment complete of the valuation report	13/06/2016 12:39:41
Awaiting assessment of the valuation report	13/06/2016 12:37:30
Awaiting valuation report	13/06/2016 12:35:22
Awaiting valuation report	13/06/2016 12:35:22

1

Documents

- Here you can view important case documents that have been produced.

Application Reference: JUN1809917

Decision In Principle	<h3>Documents</h3> <p>Application Ref: JUN1810070 Applicant 1: Miss Test Application Applicant 2: N/A Product: THW Lifetime Variable Rate with no upfront fees Security:</p> <table border="1"> <thead> <tr> <th>Document Type</th> <th>Date Added</th> <th></th> </tr> </thead> <tbody> <tr> <td>Offer</td> <td>13/06/2016 12:58:28</td> <td></td> </tr> <tr> <td>Valuation Report</td> <td>13/06/2016 12:37:31</td> <td></td> </tr> <tr> <td>Application Summary</td> <td>13/06/2016 12:29:12</td> <td>>View</td> </tr> <tr> <td>DIP Certificate</td> <td>13/06/2016 12:24:31</td> <td>>View</td> </tr> <tr> <td>DIP Decision</td> <td>13/06/2016 12:24:26</td> <td>>View</td> </tr> <tr> <td>DIP Summary</td> <td>13/06/2016 12:24:21</td> <td>>View</td> </tr> </tbody> </table>	Document Type	Date Added		Offer	13/06/2016 12:58:28		Valuation Report	13/06/2016 12:37:31		Application Summary	13/06/2016 12:29:12	>View	DIP Certificate	13/06/2016 12:24:31	>View	DIP Decision	13/06/2016 12:24:26	>View	DIP Summary	13/06/2016 12:24:21	>View	Status: Offer Issued
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KFI																							

Case Alert Options

- You can set your preference to the frequency of case update alerts.

NB: In addition to these, mandatory case alerts will be sent when we've received the full mortgage application, there's an added or outstanding case requirement, when the valuation report has been assessed and when the mortgage offer has been produced and is available.

Application Reference: JUN1810070

Application Form	<h3>Confirmation</h3> <h4>Application Success</h4> <p>Your application, JUN1810070, has been submitted. You will be able to monitor progress of the application and view the offer when it is available from the 'Case Tracking' menu option.</p> <p>Fees associated with this application totalling £150.00 have been successfully paid to The Mortgage Works and the reference number for this transaction is: TrRFx</p> <p>Next steps We will confirm any case requirements by email, please do not submit case requirements prior to receipt of this email.</p> <p>Our lending decision is subject to The Mortgage Works (UK) Plc lending criteria (which may change), full underwrite, valuation and suitability of the property.</p> <p>Should you need to contact us please call 08000 30 40 40.</p> <p>The Mortgage Works reserves the right to request further information if deemed necessary.</p> <p>Regulated Mortgage: If the property is used, or is intended to be used for occupation by your client or a related person then the mortgage will be regulated by the FCA; this includes Buy to Let mortgages where any tenant is a relative of your client.</p> <p>Confirmation Text</p> <p>Thanks for your further advance application; your business is important to us and one of our agents will process your case within x working days. Once we have completed the processing, you will be able to upload documents for any case requirements identified. Please specify your contact preferences.</p>
Mortgage Details	
Property To Be Mortgaged	
Other Contact Details	
Payments	
Case Summary	
KFI	
1 Case Alert Options	

Primary E-mail Address for Alerts:

Please send a summary of case activity: Weekly