the mortgage works

Case Tracking

This guide will show you how to use the different functions of case tracking.
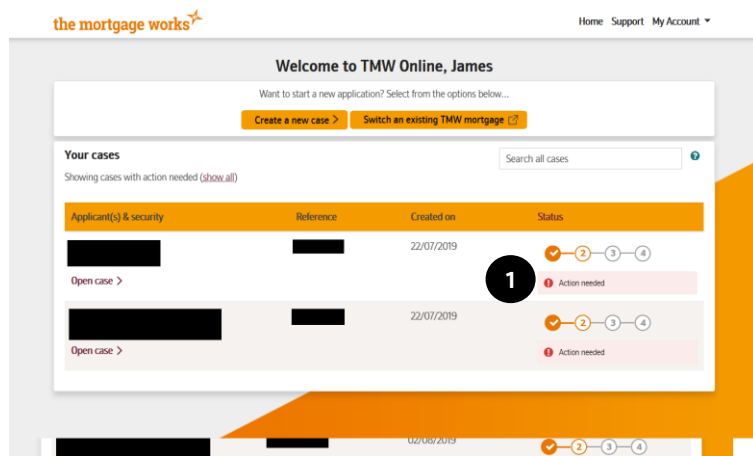
Contents

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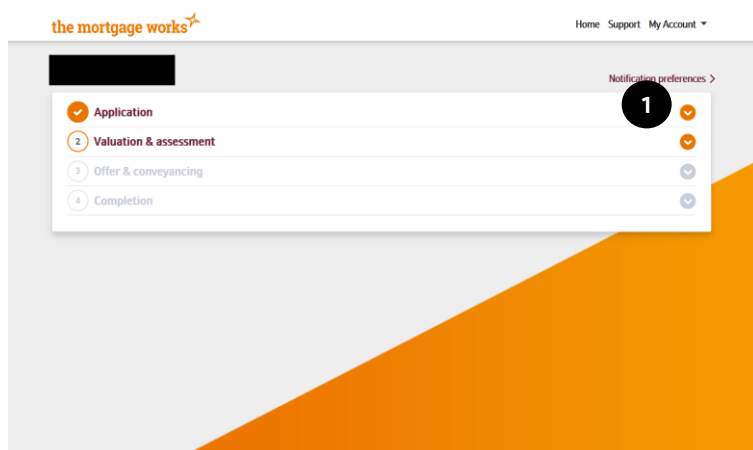
Cases that need action

1. You will be notified of cases that need action, and can view these cases separately.

1. Cases that need action will also have a notification on your case list, under the status bar

Click here to return to contents

Application Tracking

1. Click the arrow to expand the application section

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1. You will see a list of all case events up to and including submission of the full application

2. If a case event has a document related to it, you will be able to access the PDF.

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Valuation and Assessment

1. Any updates on the valuation will be seen here.

2. Case requirements will be listed

3. You can view more information about the case requirement by clicking more

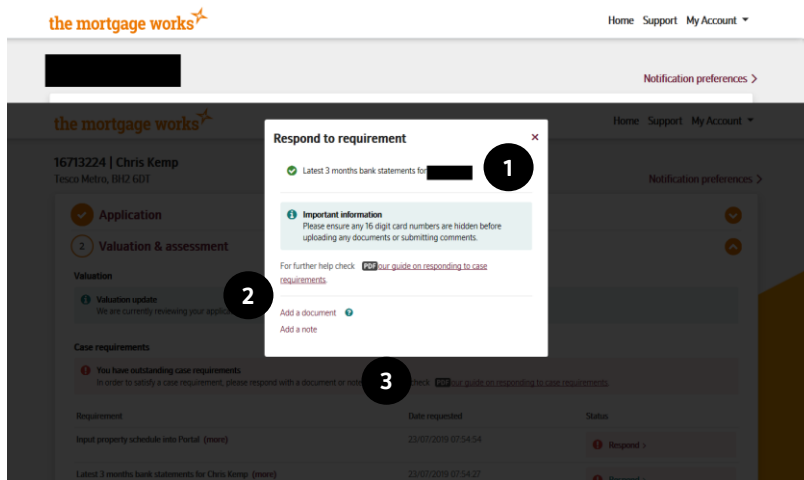4. If there have been notes left by an underwriter, you will see them here.

1. If there are no case requirements outstanding, a notice will tell you there is nothing outstanding

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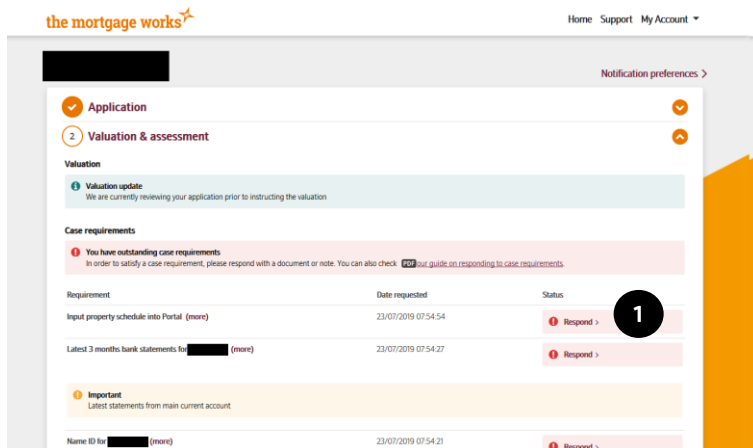
Document upload

1. To upload a document to a case requirement, click respond.

1. A modal will open and will confirm the case requirement that you are actioning.

2. You can respond with a document, a note or both. *Please note it is not a requirement to add a note if you are attaching a document so only do so if the note will support the requirement.

3. Click add a document to choose a file to attach
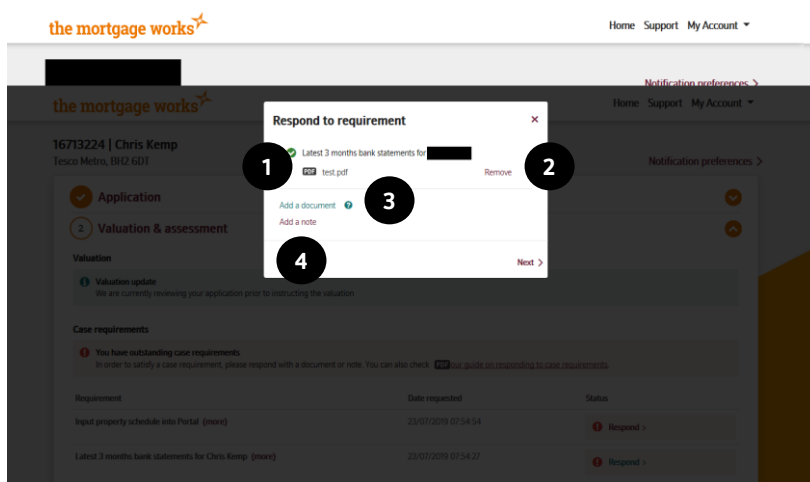
1. Once you have chosen the first document it will be displayed at the top

2. If this is not the correct document, you will be able to remove it.

3. Once you have attached your first document, you can then select add a document again to choose a second file, if required. *Please note each individual file you attach can be a maximum file size of 5mb, if attaching more than one document, the combined file size can be no more than 25mb

4. Alternatively, you can add a note, if required.

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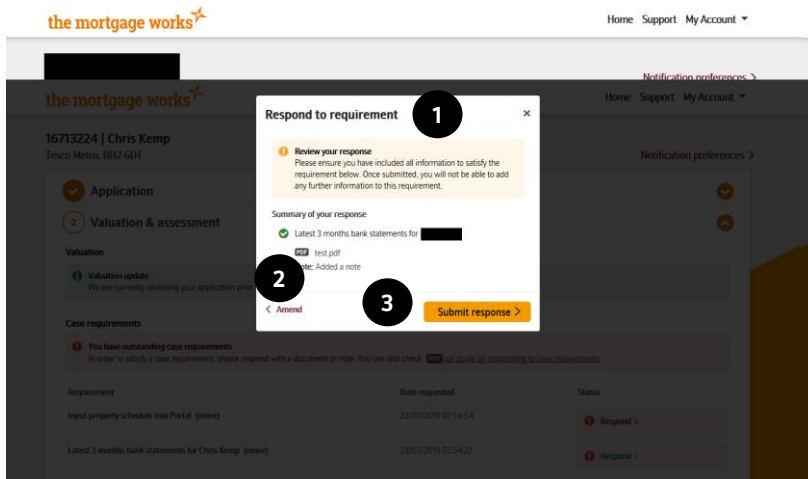
1. Once you have finished adding your documents and notes, a summary screen will be displayed.

2. Click Amend if you want to make changes to the documents and/ or notes you have already attached

3. Alternatively, click Submit response to send the case requirement responses through
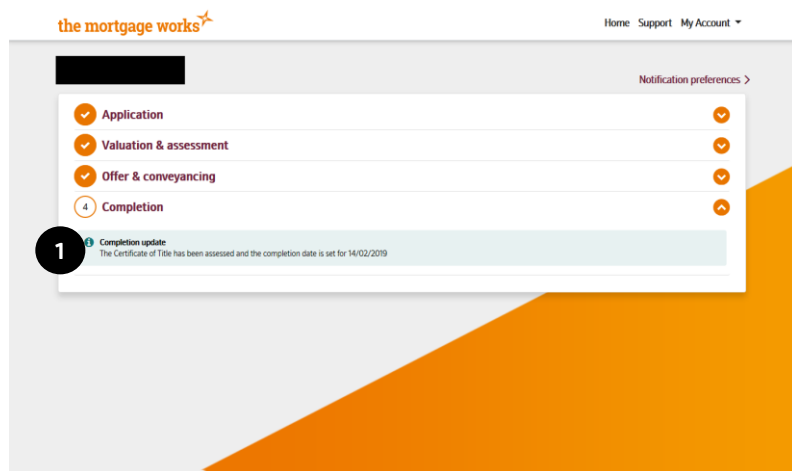
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Offer and conveyancing
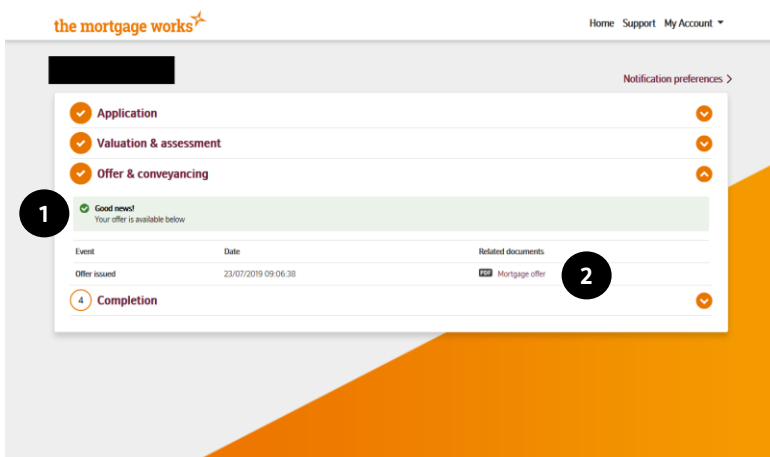
1. Updates on the offer will be displayed here

2. When the offer has been generated, you will be able to open the PDF here


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Completion

1. Updates on completion of the case will be displayed here

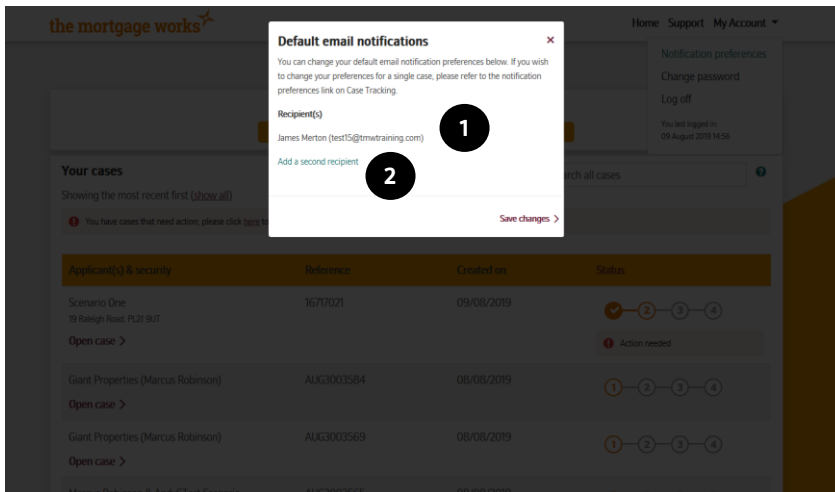To return to contents click here

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Notification Preferences

There are two ways of setting notification preferences. You can do them at a global level which will apply to all cases but you can also set notification preferences per case.
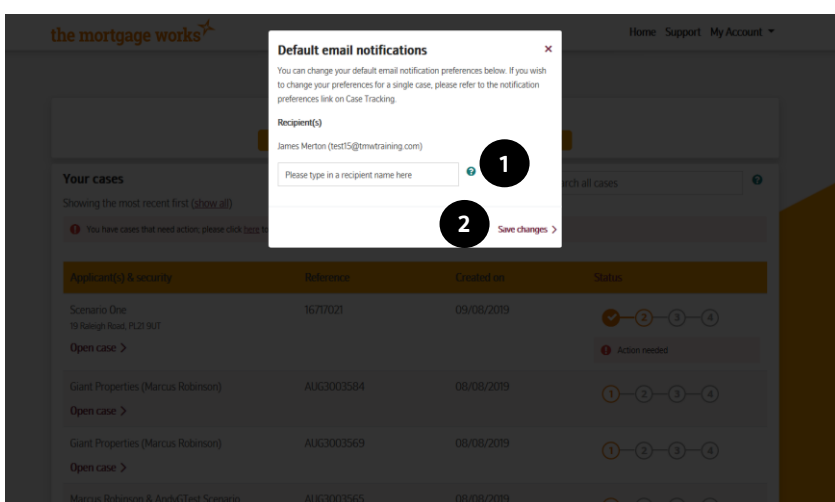
To update your global preferences, complete the following steps.
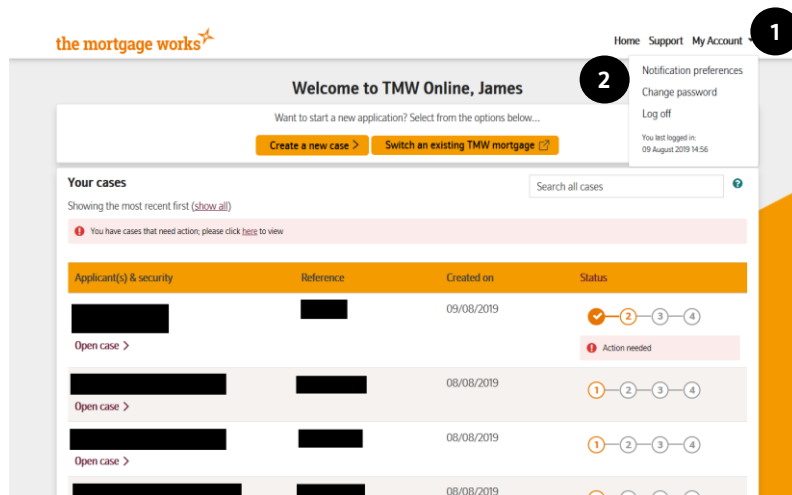
1. Click on My Account

2. Click Notification preferences
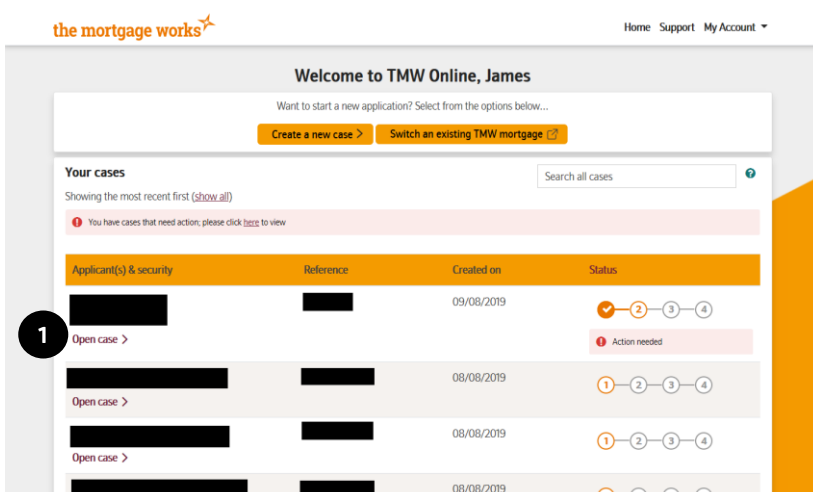
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1. Your email will be displayed as the current recipient

2. You can add a registered admin (Who is registered with TMW at the same FCA number as you) by clicking Add a second recipient
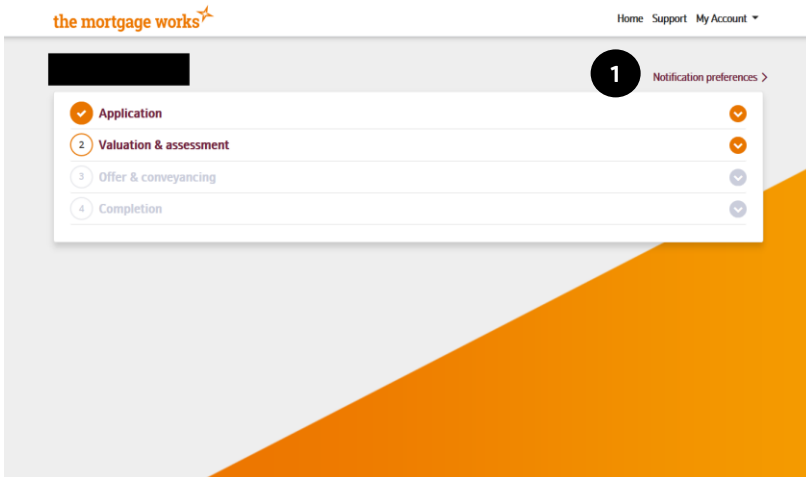

1. Enter the recipient name and select the correct one from the list of results that is displayed

2. Once you have added a second recipient, you will have the option of disabling your own email if you no longer wish to receive notifications. * Please note, at least one email address must be enabled to receive email notifications. Once you are done, click save changes.
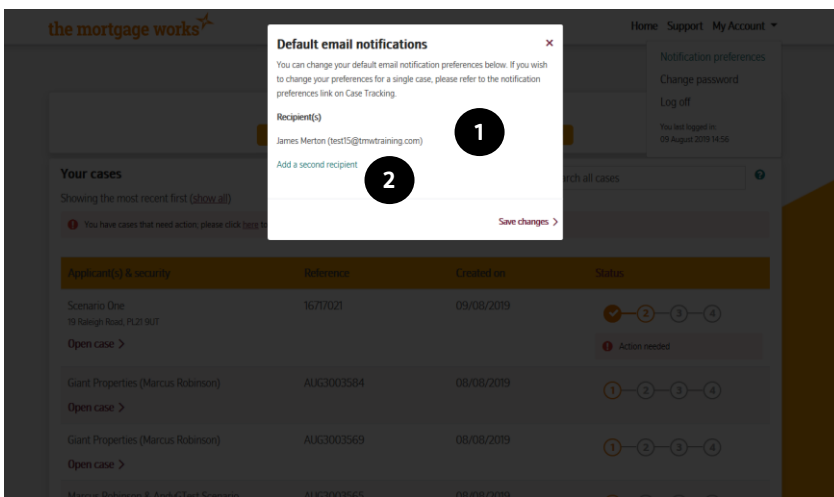
If you would like to update the notification preferences on one case, instead of all cases, complete the following steps.
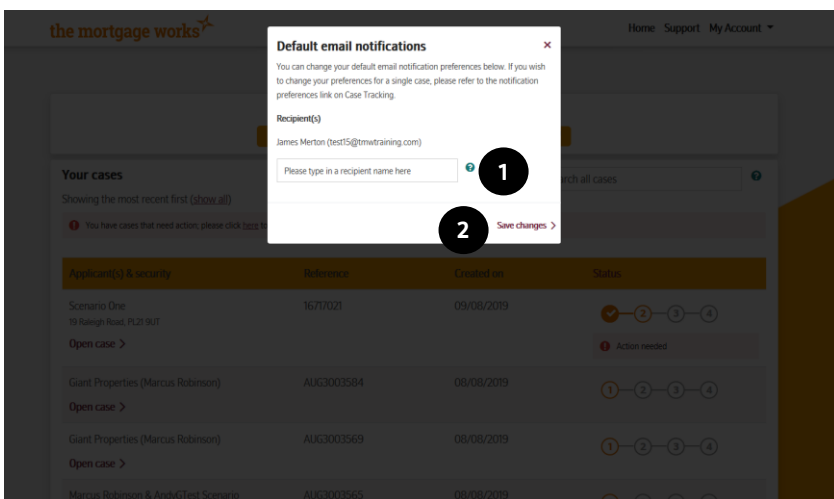

1. Click open case to go into the case you would like to update the notification preferences on.

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1. Click notification preferences

1. Your email will be displayed as the current recipient

2. You can add a registered admin (Who is registered with TMW at the same FCA number as you) by clicking Add a second recipient

1. Enter the recipient name here and select the correct one from the list of results that is displayed

2. Once you have added a second recipient, you will have the option of disabling your own email if you no longer would like to receive notifications. * Please note, at least one email address must be enabled to receive email notifications. Once you are done, click save changes.

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