

# Case Tracking

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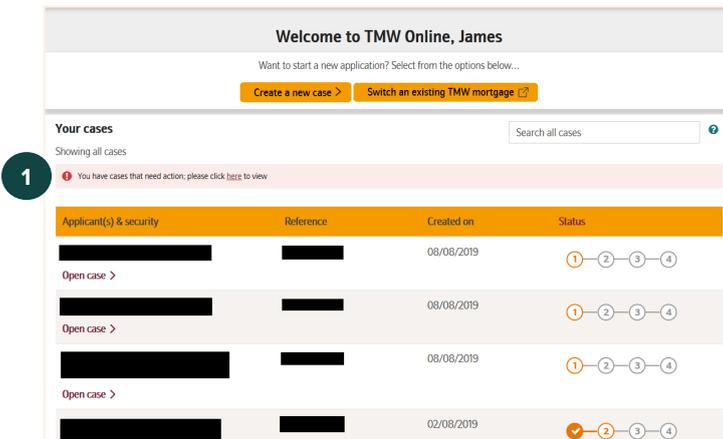
This guide will show you how to use the different functions of case tracking.

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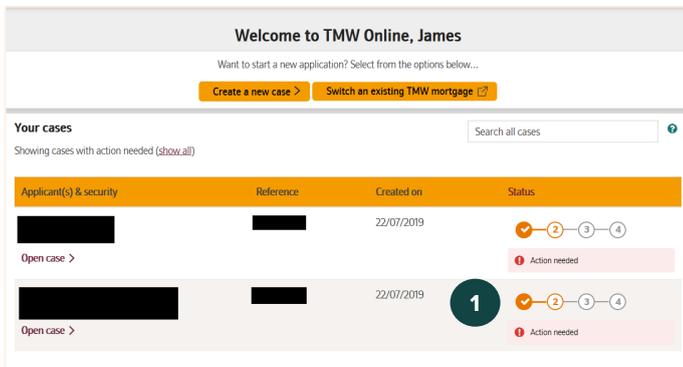
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# The mortgage works

## Cases that need action



1. You will be notified of cases that need action. You can view each case separately.



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

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## Application tracking



1. Click the arrow to expand the application section.

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Event	Date	Related documents
Case created	05/08/2019 10:00:17	
DIP accepted	05/08/2019 10:18:26	DIP certificate DIP summary
Application submitted	05/08/2019 10:27:21	Application summary

**2 Valuation & assessment**

3 Offer & conveyancing

4 Completion

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

**2 Valuation & assessment**

**1 Valuation update**  
We are currently reviewing your application prior to instructing the valuation

**2 Case requirements**  
**1 You have outstanding case requirements**  
In order to satisfy a case requirement, please respond with a document or note. You can also check [our guide on responding to case requirements](#).

Requirement	Date requested	Status
Input property schedule into Portal (more)	23/07/2019 07:54:54	Respond >
Latest 3 months bank statements for [REDACTED] (more)	23/07/2019 07:54:27	Respond >

**4 Important**  
Latest statements from main current account

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 any notes have been left by an underwriter, you will see them here.

**Application**

**2 Valuation & assessment**

**1 Valuation update**  
We are currently reviewing your application prior to instructing the valuation

**Case requirements**  
**1 You have nothing outstanding**  
We don't need anything from you at this time. We'll review your application and any supplementary information you have provided and update as soon as we have completed our assessment.

3 Offer & conveyancing

4 Completion

1. If there are no case requirements outstanding, a notice will tell you.

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## Document upload

The screenshot shows the 'Application' section of the mortgage works portal. Under 'Valuation & assessment', there is a 'Valuation update' section and a 'Case requirements' section. The 'Case requirements' section has a red warning icon and states: 'You have outstanding case requirements. In order to satisfy a case requirement, please respond with a document or note. You can also check [our guide on responding to case requirements](#).' Below this is a table of requirements:

Requirement	Date requested	Status
Input property schedule into Portal (more)	23/07/2019 07:54:54	Respond >
Latest 3 months bank statements for [redacted] (more)	23/07/2019 07:54:27	Respond >
Important: Latest statements from main current account		
Name ID for [redacted] (more)	23/07/2019 07:54:21	Respond >

1. To upload a document to a case requirement, click 'Respond'

A separate window will open and will confirm the case requirement you are actioning.

The screenshot shows the 'Respond to requirement' dialog box. It has a title bar with a close button. The main content area has a green checkmark and says: 'Latest 3 months bank statements for [redacted]'. Below this is an 'Important information' section: 'Please ensure any 16 digit card numbers are hidden before uploading any documents or submitting comments. For further help check [our guide on responding to case requirements](#).' At the bottom, there are two buttons: 'Add a document' and 'Add a note'. A red circle with the number '1' is over the 'Add a document' button, and a red circle with the number '2' is over the 'Add a note' button.

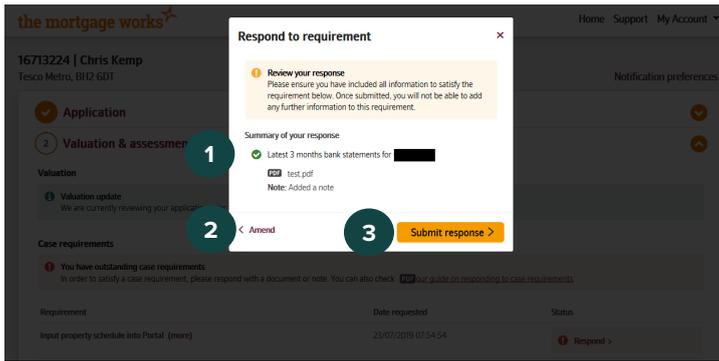
1. You can respond with a document, a note or both. You do not have to add a note if you are attaching a document, so only do so if the note will support the requirement
2. Click 'Add a document' to choose a file to attach.

The screenshot shows the 'Respond to requirement' dialog box with a document added. The main content area now shows: 'Latest 3 months bank statements for [redacted] test.pdf Remove'. Below this are the 'Add a document' and 'Add a note' buttons. A red circle with the number '1' is over the 'Remove' button, a red circle with the number '2' is over the 'Add a document' button, and a red circle with the number '3' is over the 'Add a note' button. At the bottom right, there is a 'Next >' button. A red circle with the number '4' is over the 'Add a document' button in the background.

1. Once you have chosen the first document it will be displayed at the top
2. If this is not the correct document, you can remove it.
3. Once you have attached your first document, you can then select 'Add a document' again to choose a second file, if needed. Each individual file you attach can be a maximum size of 5mb. If attaching more than one document, the combined file size can be no more than 25mb
4. Or you can add a note, if required.

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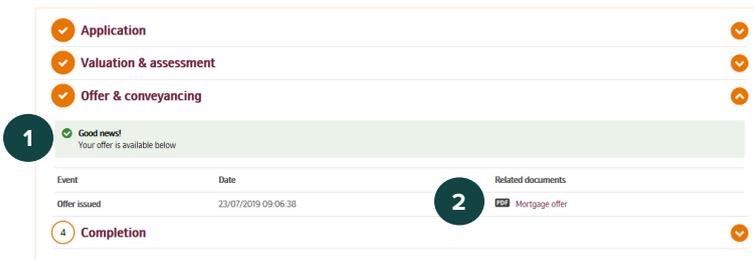
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1. Once you have finished adding your documents and notes, a summary screen will be displayed.
2. Click 'Amend' if you want to make changes to the documents and / or notes you have already attached
3. Or click 'Submit response' to send the case requirement 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

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- Application
- Valuation & assessment
- Offer & conveyancing
- 4 Completion

**1** Completion update  
The Certificate of Title has been assessed and the completion date is set for 14/02/2019

1. Updates on completion of the case will be displayed 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. Or you can set separate notification preferences for each case.

To update your global preferences, complete the following steps.

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Welcome to TMW Online, James

Want to start a new application? Select from the options below...

Create a new case > Switch an existing TMW mortgage

1 My Account

- 2 Notification preferences
- Change password
- Log off

You last logged in: 09 August 2019 14:56

Your cases

Showing the most recent first (show all)

Search all cases

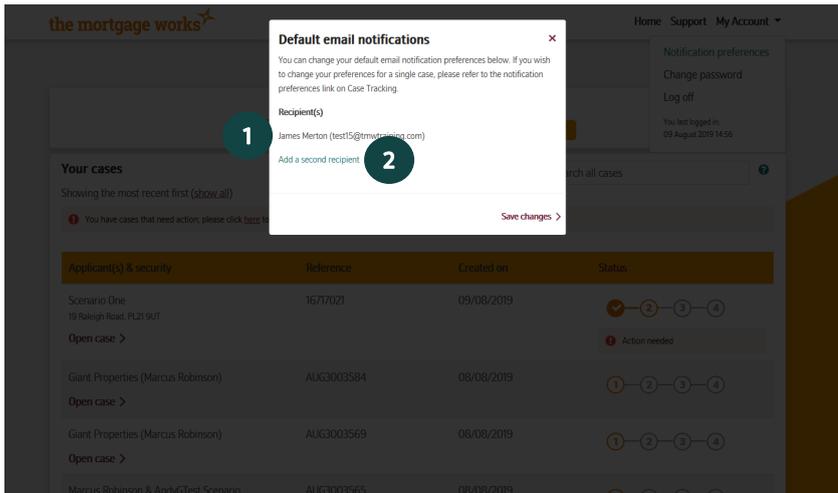
You have cases that need action; please click [here](#) to view

Applicant(s) & security	Reference	Created on	Status
[REDACTED]	[REDACTED]	09/08/2019	✓ 2 3 4
Open case >			
[REDACTED]	[REDACTED]	08/08/2019	1 2 3 4
Open case >			
[REDACTED]	[REDACTED]	08/08/2019	1 2 3 4
Open case >			
[REDACTED]	[REDACTED]	08/08/2019	1 2 3 4

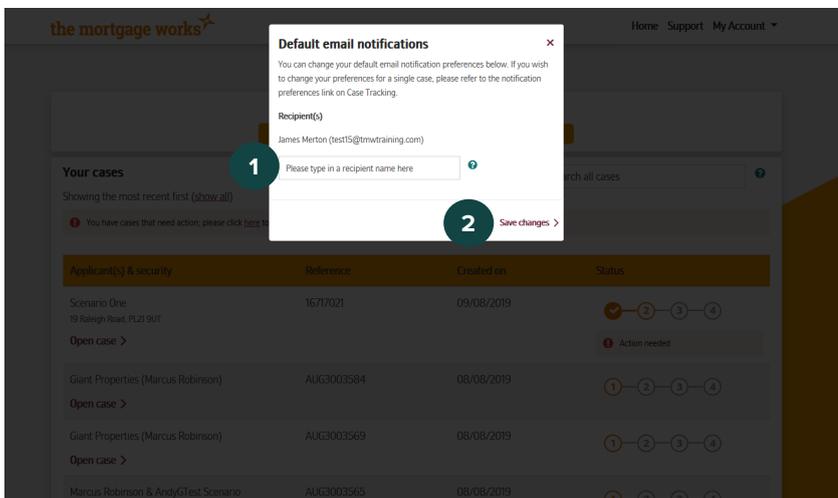
1. Click on 'My Account'
2. Click 'Notification preferences'.

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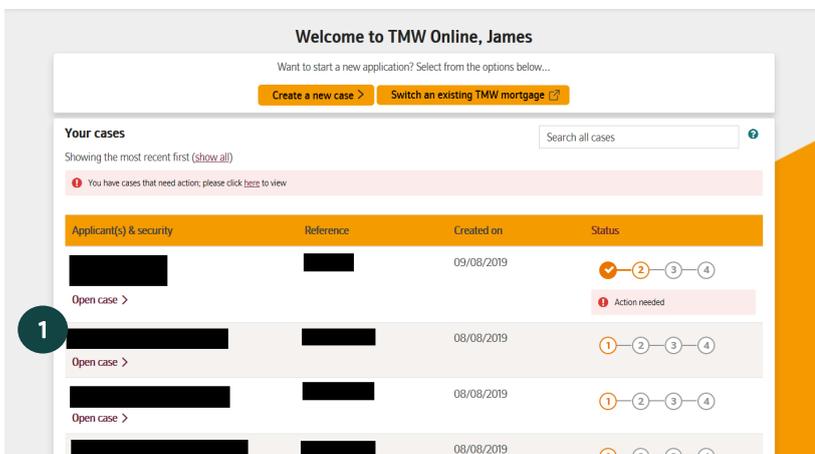


1. Your email will be displayed as the current recipient
2. You can add a registered admin (who is registered with us at the same FCA number as you) by clicking 'Add a second recipient'.



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. At least one email address must be enabled to receive email notifications. Once you are done, click 'Save changes'.

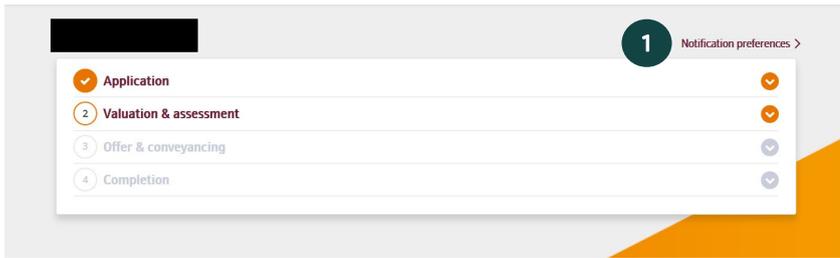
If you would like to update the notification preferences on one case, instead of all cases, complete the following steps.



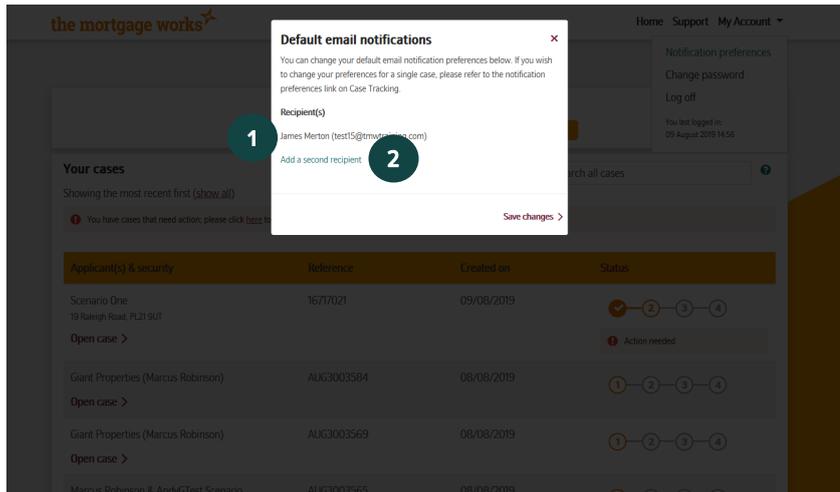
1. Click 'Open case' to go into the case you would like to update the notification preferences on.

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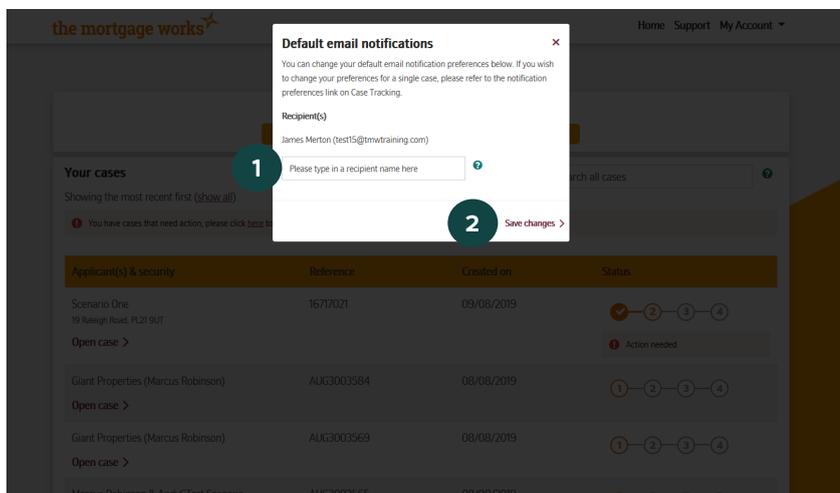
# The mortgage works



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 us 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. At least one email address must be enabled to receive email notifications. Once you are done, click 'Save changes'.

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Case Tracking Guide (Jan 2025)