

FOR INTERMEDIARY USE ONLY

NFI Online Quick Start Guide

What you'll find in this guide

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Nationwide

Building Society

Register

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KFI

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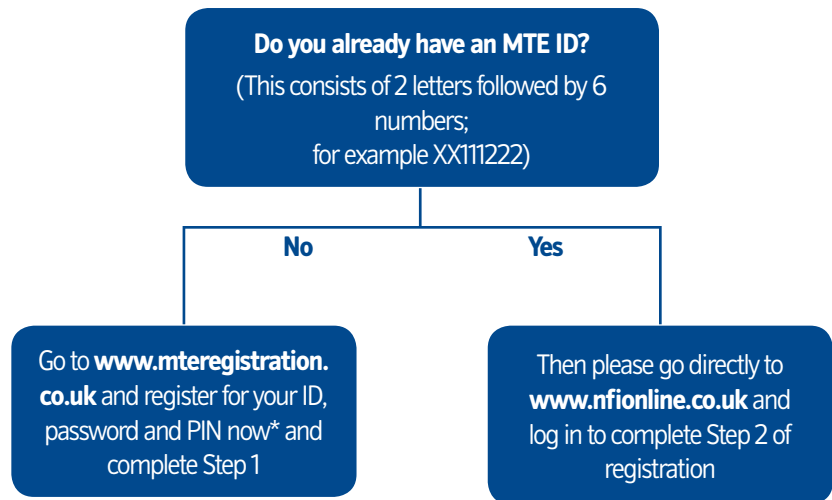
FAQs

Registration is split into two easy steps:

Step 1 - Obtain User ID from MTE and register with MTE

Step 2 - Register to use NFI Online

Step 1



*When registering with MTE please remember:

If you are an AR, register with your firm's FCA number and not the principle's.

Wait for 2 hrs upon receipt of the confirmation mail before attempting Step 2.

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Step 2

Checklist

- You're now registered with MTE and have been assigned an MTE ID
- Waited for 2 hours to allow MTE registration to complete

To complete your registration open www.nfionline.co.uk and login with your:

- User ID – assigned to you by MTE
- Password – you set this during Step 1
- PIN – you set this during Step 1
- Surname

Press the Register Now button to start Step 2 of registration*

Please note: To register as an adviser, you'll need to select 'seller' from the available options.

You'll receive an email from us within 2 hours, confirming your registration has been completed. Alternatively, we'll contact you if we require further information.

*When registering with us please remember to have your network's agent, or branch code ready to enter when requested (if applicable). Bank account information will be required if procurement fees are paid directly to your firm.

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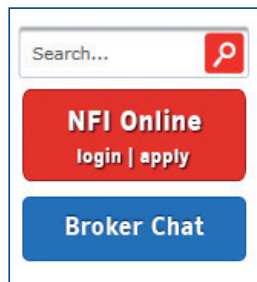
FMA

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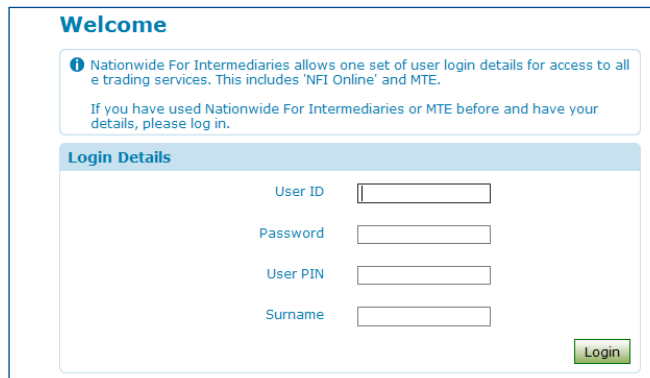
1. Once you've received the email confirming that your registration has been activated, you'll be able to submit mortgage applications to us. Please go to www.nationwide-intermediary.co.uk and use the Login link on the right side of the page:

Please note the information you enter is case sensitive.



2. **Login using the below information**

- **User ID** – assigned to you by MTE
- **Password** – you set this during Step 1
- **PIN** – you set this during Step 1
- **Surname**



Welcome

Nationwide For Intermediaries allows one set of user login details for access to all e trading services. This includes 'NFI Online' and MTE.

If you have used Nationwide For Intermediaries or MTE before and have your details, please log in.

Login Details

User ID

Password

User PIN

Surname

If you encounter any problems during the login process contact us via Broker Chat or call 0800 545 31 31 - option 1 or 2.

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Getting around our site

Upon a successful login you will be presented with the screen below; this we call 'My Home'

Before creating a KFI or performing a DIP, a case will need to be created first. Press the 'Create new case' button to start this process.

Nationwide NFI Online Help - 0800 545 3131 Secure log on: Biju Chacko

My Home Case Home Lending Criteria Save and Exit Log out

Your Details
This is the information held on our database for you...

Warner Holt Financial Services
FSA: 400020
Tel: 01234 159357
Mob: 07896541230
Fax: 01234 951357
Email: Msotestuser2@nbsdev.co...

666 XYZ
test
test
test
sn18 1nw

This data will be used on any KFI or Offers produced.
If any of this needs amending, please click on **Manage my details**

My Home
Welcome Biju, have you seen our latest news...

A new case must be created first, even to generate a KFI. **Create new case**

These are the last 10 cases you have worked on. If the case you require is here, select the appropriate 'Action' or 'Search for a case' **Search for a case**

Case Id	Created On	Status	Applicant(s)	Intermediary	Action
M650108863	07-03-2018	Application Submitted	Attfield L; Khan S;	Chacko, Biju	Open
M650108726	07-03-2018	Closed	Attfield L; Khan S;	Chacko, Biju	Open
M650108828	07-03-2018	Application Submitted	Coghlan S;	Chacko, Biju	Open
M650108624	06-03-2018	DIP	Collins S; Collins A;	Chacko, Biju	Open Cancel
M650108892	07-03-2018	Application Submitted	Dickey K; Dickey L;	Chacko, Biju	Open
M650108837	07-03-2018	DIP	Howard T;	Chacko, Biju	Open Cancel
M650108761	07-03-2018	Application Submitted	Kearney J; Kearney J;	Chacko, Biju	Open
M650108742	07-03-2018	Uploading	Mdctctstthree S;	Chacko, Biju	Open
M650108871	07-03-2018	Application Submitted	Milne I; Henthorn K;	Chacko, Biju	Open
M650108757	07-03-2018	Case Created	Milne I; Henthorn K;	Chacko, Biju	Open Cancel

Your details appear on the left; if anything here is incorrect you can press the 'Manage My Details' button to make changes.

Here you can see your existing cases and their current status. To open the case you want to work on, click 'Open'.

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Getting around our site

Upon a successful login you will be presented with the screen below; this we call 'Case Home'

Product reserved, KFIs produced and your case contact details will appear on the relevant tab.

Case stages available to complete appear in white text on the left hand menu. Simply click on a stage to begin, or continue it. Stages go in order of:
DIP
Reserve Product
FMA
Final Steps.

Outstanding case requirements (proofs) will be listed here once the case has received a DIP.

The Case History can be viewed here. For example, date created, date of DIP etc.

You can also view any case documents attached to this case here, including the KFI, Application Summary Report, Payment receipts and the Mortgage Offer once it has been produced.

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Getting around our site

Cancel, Backward and Continue

Cancel

[Cancel](#)

Press the Cancel button when you've made a keying error on the current page. This will reset all of the entries you've made and send you back to the previous page.

Backward

[Backward](#)

Use the backward button if you need to review, and/or edit information entered on a previous page. A warning will appear if any mandatory information has been missed. Don't use your browser's back button to go between pages.

Continue

[Continue](#)

Use the Continue button to progress to the next page of the application stage. A warning will appear if any mandatory information has been missed.

Version: 4.9.258.0 |

[Cancel](#) [Backward](#)

[Continue](#) 

Page ID: 927004

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Creating a new case

From the 'My Home' page click on the 'Create New Case' button.

[Create a new case](#)

Please check your application type against the list of online exceptions that now appears. If the application type you wish to submit is an exception case, please follow the link below for guidance on how to submit this:

http://www.nationwide-intermediary.co.uk/eservices/submit_a_case

1. If not then tick the statements box and press Continue.

I confirm that all of the above statements apply

2. Choose your desired submission channel and choose a telephone number that we may contact you on.
3. Please confirm that you've read the 'How Nationwide uses your information' to your clients by the ticking the relevant box; and then press Continue.
4. Enter your applicant's details

- Surname
- Middle name
- Forename
- Date of birth
- Postcode

Please check this information carefully; once a case has been created this cannot be changed.

5. If we already have the applicant's information on record we will highlight this to you, and ask if you wish to use this information. To replace, or create new applicant information, press the Create New Applicant button.

[Create a new applicant](#)

6. If you wish to add a second applicant press 'Add another applicant' and repeat the process from step 4 above.
7. Once finished press the Create Case button.

[Create case](#)

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Creating a KFI

At this point you can choose to create a KFI or start the DIP. Indicate your choice by clicking on KFI or DIP from the left hand menu.

KFI

Once you've produced a KFI you will be given the opportunity to promote the information entered into a DIP.

Promote this KFI data into a DIP

Quick Tip

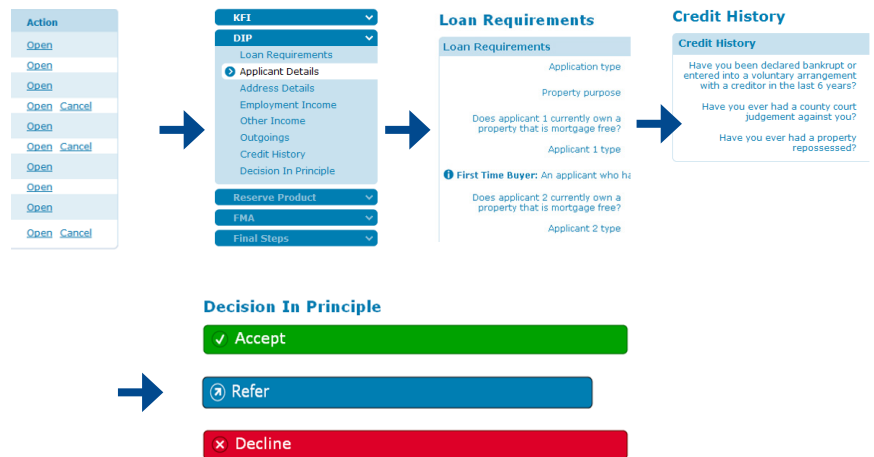
KFI(s) produced can be retrieved at any time from the 'Case Documents' tab found on the 'Case Home' page.



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Creating a DIP

1. From 'My Home' locate the case you need to DIP. Click on the 'Open' link to open it.
2. To start the DIP process click on the DIP option from the left hand menu.
3. The DIP begins with Loan Requirements, where you choose the application type.
4. It finishes with Credit History; where you declare any bankruptcy or CCJs.



5. The DIP will be submitted for credit score once the continue button has been pressed. This credit score will leave a full footprint on your clients' credit file. If a new DIP is created within 5 calendar days of the original, no new footprint will be left on your client's credit file.
6. An instant lending decision will be provided. Please check the decision text, or the case home page, for any case requirements we've asked for.

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Creating a DIP

Things to remember

- You'll be asked for the client's middle name, if applicable, please ensure this is recorded or you will be asked to submit the case again potentially incurring further fees.
- When keying any Bonus, Overtime or Commission income, please ensure the figure entered matches the frequency of the bonus payment.

For example: Applicant A is paid a Quarterly bonus of £5000

The screenshot shows a form with two fields: 'Bonus' and 'Bonus frequency'. The 'Bonus' field contains the text '£5,000'. A red dotted arrow points from a callout box on the right to this field, which contains the text 'Enter £5000 as the Bonus amount'. The 'Bonus frequency' field is a dropdown menu with 'Quarterly' selected. A red dotted arrow points from a callout box below to this dropdown, which contains the text 'Then choose Quarterly as the Bonus frequency from the dropdown box.'

Don't annualise the figure first and then choose Quarterly, as this will inflate the figure.

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Creating a DIP

Things to remember

If your application is part of an External scheme (**Help to Buy**) then please choose 'Yes' to the below question found on the 'Loan Requirements' page. Please ensure you choose the appropriate Application Type, i.e. Equity Share.

The screenshot shows a form titled "Scheme Details" with a question: "Does this application relate to a Nationwide or external scheme?". There are two radio buttons: "Yes" (selected) and "No". Below the question are two dropdown menus. The first is labeled "Nationwide Scheme" and has "None" selected. The second is labeled "External Scheme" and has a dropdown menu open showing "None", "Please select..", "Help to Buy", and "None". A "Cancel" button is visible at the bottom left of the form.

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Reprocessing a DIP

Things to remember

- You're unable to amend any of the following applicant details; or items that appear 'greyed' out:
 - First name
 - Surname
 - Date of birth
 - Title
 - Middle name
 - Gender
 - Address details
- If you've already reserved a product for this case, you'll see a new screen in the DIP called '**Existing Product Reservation**'. If the existing product reservation is no longer valid, due to the changes you've made, you may have to reserve an alternative product, which could incur additional fees. The system will advise you if this is the case.
- If the 'Change Data' button is not appearing where you believe it should be, the case might not be editable. Please call the Service Centre on 0800 464 3000 to check the status of the case.
- A new footprint will be left if 90 days have passed since the original decision date.

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Reserving a Product

Product Selection

1. Product Selection defaults to Single Product and cannot be changed.

Product Sets

2. Check the box to confirm the type of product you have sourced
 - Fixed
 - Variable
 - Tracker
 - All

Product Term

3. Choose your desired product term from the drop down list.
4. Press to progress to '**Product Selection**'.

Eligible Products List

1. Review the list of products displayed on-screen and tick the box to the right of the product you have chosen. The product details will be shown underneath, check this carefully to ensure this is the correct; particularly in the case of free legal variants. **If necessary please check the product codes on our website.**

Press to progress to '**Fee Payment Options**'.

Fee Payment Options

1. Please specify your preference for the payment of fees using the drop down list provided.
2. Press to progress to '**KFI**' options.

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Reserving a Product

Obtain New KFI

1. If you require a new KFI, due to a change of product, then choose Yes and follow the prompts. Otherwise press to pay, or defer, the fees.

Fees Payable

1. A product fee may be applicable in order to reserve the product. Please bear this in mind if you plan to return to the application at a later time.
2. Please specify how the applicant(s) wish to pay for the product fee using the drop down list.
3. Press once you've made your choices.
4. A summary of fees being charged will appear at the top of the screen.

Fee Option

1. You can opt to pay all fees upon submission of the FMA, including any applicable product fee; however if the product carries a fee the product won't be reserved until this has been paid.

Card Payment Details

1. Please enter the card details to be used for payment. Unfortunately we're unable to accept Maestro cards, typically these begin with the digits '67'.
2. Press 'Make Payment' to finalise the reservation; or Continue if you've opted to pay fees at final submission.
3. You'll receive confirmation that payment was successful, similarly you'll be warned if it was unsuccessful and provided the opportunity to try again.
4. Press to view Product Confirmation and the facility to print a payment receipt.

Product confirmation, and the payment receipt, can be viewed from Case Home at anytime.

Things to remember

- If your product carries a fee, it will not be reserved until you have paid the non-refundable product fee.
- Please check the product code carefully if seeking the free legal variation.
- Any changes made that affect the LTV may require you to reserve a new product incurring an additional fee. Please contact Dedicated Broker Support on 0800 545 31 31 – Option 1 if you are unsure.

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Full Mortgage Application

Things to remember

- If you can't add, or amend information then it's likely the case is not editable. This could be for a number of reasons, one being that the case has been fully submitted and can no longer be reprocessed. If you're unsure of the reason why you're not able to edit the case you can contact the service centre on 0800 464 3000 for support or to make material changes to the application over the phone. Please complete a Material Change Form, which can be located here:

http://www.nationwide-intermediary.co.uk/literatureanddownloads/application_forms

- When entering further details of the loans to be repaid within 6 months, please make sure to enter these loans only. If a loan is to continue please don't enter it here. The total monthly balance must match the figure at the top of the page.
- You'll be unable to complete the FMA if the property details weren't completed in the DIP. Please refer to the reprocessing section on page 13 of this guide, add this information and resubmit the DIP. These changes may impact upon affordability.
- When searching for a solicitor, enter the first few characters of the solicitor's firm name only.

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Case Documents

Document proofs can be scanned and sent to us through our Scan and Attach service.

When scanning your documents please ensure they are saved in either PDF or TIF format; and are no bigger than 3MB per file. PDF files are generally smaller making this the preferred format. Attempting to send files that are too large, or of a different file type, will generate an error message.

1. From the 'My Home' page open the case you need to attach documents against.
2. Locate the 'Attach Documents' button on the left hand menu and click on this.



Attach documents

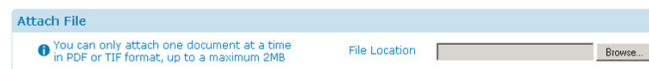
3. Tick the box to the right of the requirement you wish to attach.

Case Requirements				
Requirement Type	For	Relating To	Required Prior to	Select
12m bank statements showing payment of rent	Mrs Carol Bane		Offer	<input type="checkbox"/>

No matching case requirement

No matching case requirement Document Name

4. Now click the Browse button at the top of the screen.



5. Browse to the relevant file, using the window that opens, select it and press Open.
5. Finally press the **Attach Document** button found at the bottom of the page.
6. To attach a document not on the list, tick the box by 'No Matching Case Requirement' as per point 3. Enter a short name in the text box, and then follow from point 4.

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Case Documents

Document proofs can also be faxed when sent with our FAX header sheet.

1. Simply follow steps 1 to 3 from the previous page.
2. This time rather than clicking on 'Browse' click the [Create Fax cover sheet\(s\)](#) found at the bottom of the page.
3. A unique FAX sheet will be created for the requirement you wish to FAX to us.
4. Repeat this for other requirements you wish to send this way.
5. FAX to the number printed on the header sheet.

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FAQs

Registration/Login

- Q.** When I click login, to finish my registration, the following error appears: '**There has been a problem...**'
- A.** You need to allow up to 2 hours for MTE to send Nationwide your new registration. If the problem persists please call us on 0800 545 31 31 – Option 1 or 2.
- Q.** I completed Step 2 of registration but I'm still unable to login some hours later.
- A.** Please check your spam or junk mail boxes to check that we haven't attempted to email you regarding your registration. Alternatively please call us on 0800 545 31 31 – Option 1 or 2.

General

- Q.** I've opened my case but it's not allowing me to add, or change any information.
- A.** The case isn't editable. This could be for a number of reasons, including but not limited to:
- The case is a refer decision (you'll need to get the DIP unlocked by contacting us on 0800 545 31 31 - Option 2.)
 - Someone else has the case open in edit mode
 - The case has been fully submitted and can no longer be reprocessed
- Some decline decisions will also mean that a case can't be edited. If you're unsure as to why the case can't be edited, please call us on 0800 545 31 31 - Option 2.

DIP

- Q.** I've not been asked the correct questions for my Shared Ownership, Equity Share, or other scheme-related case on the Loan Requirements page.
- A.** Please check that you have chosen the appropriate scheme from the 'Property Ownership Type' dropdown, found on the loan requirements page. Once this has been chosen the correct questions will appear.
- Q.** I'm experiencing difficulty entering an address I know to be correct.
- A.** Please call our eSupport team on 0800 545 31 31 – Option 2 to discuss this further.

DIP Reprocessing

- Q.** My case has been declined, however when attempting to reprocess the DIP it's not allowing me.
- A.** Some decline reasons do not allow the DIP to be reprocessed; to check the status of your case please call the Service Centre on 0800 464 3000.
- Q.** The case has been scored however I've noticed that the applicant's name and/or address details are incorrect. Can I now amend these?
- A.** Once the DIP has been scored you are unable to amend the current and previous address history, or applicant's name. Please call us on 0800 464 3000 for further guidance.

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FAQs

Product Reservation

Q. I've already reserved a product but now wish to change it. Is this possible?

A. To reserve a new product reopen the case and then click on Reserve Product and follow the onscreen prompts.

FMA

Q. I'm finalising details of the loans to be cleared, but it's not allowing me to continue from this page.

A. We only need to know about the loans being cleared, please remove those loans remaining and ensure the total monthly payment matches that at the top of this section. If this information has changed since the DIP, you'll need to reprocess the Outgoings section in the DIP to ensure this is correct, and then retry.

Attach Documents

Q. An error is appearing when I attempt to send you my case requirements.

A. When scanning your documents please ensure they are saved in .TIF or .PDF format; and that they are below 3MB in size. If the document is more than 3MB, you will need to split this down into smaller parts and attach separately.

Common things to check on your scanner software: Image resolution is set to 150dpi or lower, and colour is black and white or greyscale.

Other

Q. When opening case documents they appear blank or there is an error on the screen.

A. Please ensure that you are using Internet Explorer when accessing our website. Other browsers are compatible but are unable to display the case documents.

If your query is not listed above then please call us. For technical assistance please call eSupport on 0800 545 31 31 – Option 2. For criteria, policy or product related queries please call Dedicated Broker Support on 0800 545 31 31 – Option 1. For case requirements and post-submission queries, call the Mortgage Service Centre on 0800 464 3000.