

Halifax Intermediaries

A guide to uploading your documents

FOR THE USE OF MORTGAGE INTERMEDIARIES
AND OTHER PROFESSIONALS ONLY



8 step guide to our document upload system

1 Upon submission of an application click on the Upload Documents button at the bottom of the page to take you to the Upload Document page

2 To upload the document, click the blue text link within the grey box to browse for your files

3 Select the file you wish to upload and select open

4 Select the appropriate document type from the drop down box for the document you have selected

5 Select upload. Should you wish to upload multiple documents repeat the last 3 steps. Once all the required documents are uploaded you are now ready to submit these documents in batches of 10 at a time to our Broker Support Team

6 Select 'Submit documents'

7 A message will appear on screen "Are you sure you want to submit the document(s)". Click Submit document(s) or click Cancel to save and resume later

8 Follow our next steps guidance.

Further Advance

- Upon submitting a Further Advance application a member of our Broker Support Team will contact you within 24hrs. We will confirm that the illustration is available, advise you of the next steps and any documentation that we require
- Once we have contacted you, you can log in to Halifax Intermediaries and click on the Further Advance tab this will take you to the online repository screen where you can view the application illustration
- To upload documents, click on the Upload Documents tab and follow from step 2 of the 8 steps to upload your documents on the previous page.

Product Transfer

- When you have submitted a Full Affordability or Budget Assessment Product Transfer on behalf of your client a member of our Broker Support Team will contact you within 24hrs. We will confirm that the illustration is available, advise you of the next steps and any documentation that we require
- Once we have contacted you, you can log in to Halifax Intermediaries and click on the Product Transfer tab this will take you to the online repository screen where you can view the application illustration
- Where we have requested documentation click on the Upload Documents tab and follow from step 2 of the 8 steps to upload your documents on the previous page.

Existing Applications

For existing applications where you wish to upload further documentation:

- On the home page select the submitted application you wish to attach documents to. This will take you to the application summary screen for the case selected
- Select the Upload Documents tab and follow from step 2 of the 8 steps to upload your documents on the previous page
- There is no requirement to contact us. A member of our Broker Support Team will contact you within 24hrs once your document(s) have been processed.

Next Steps:

- New Mortgage application under £500K, once all the required documents have been submitted contact our Broker Support Team for initial checks – **0345 030 6253**
- Premier Mortgage cases (£500K and above) our Specialist Team will contact you directly to advise of next steps
- For Further Advance and Product Transfer applications there is no need to call us; a member of our Broker Support Team will contact you within 24hrs once your documents have been processed
- **Note: For all application types where you are uploading subsequent documents later in the process you are not required to call us. A member of our Broker Support Team will contact you within 24hrs once your documents have been processed.**

Helpful Tips

- Applications must be fully submitted and all fees paid before the document upload service becomes visible
- Amalgamate documents by customer and document type to one file e.g. Payslips for Mr A to one file, Payslips for Mrs A to a second file
- 60 files up to 10MB each can be submitted per case
- File formats accepted are: PEG, JPG, BMP, TIFF, TIF or PDF
- Browser compatibility is: IE10, IE11, Edge, Firefox, Chrome, Safari
- In the unlikely event you experience a technical issue please ensure you have the Intermediary Document Upload error code displayed on screen and call **0345 608 0038**.

Further Information

- For guidance when attaching documents or support with a technical issue e.g. you receive an error message or the document upload tab isn't visible when you have submitted the case, please contact the Technical Helpdesk **0345 608 0038**.
- If you have submitted documents but have not received the on screen confirmation message or you cannot see the table of documents attached to the case, please contact the Broker Support Team **0345 030 6253**.

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