

FOR THE USE OF MORTGAGE INTERMEDIARIES AND OTHER  
PROFESSIONALS ONLY

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# IT'S EASIER TO DO BUSINESS WITH HALIFAX INTERMEDIARIES ONLINE DOCUMENT UPLOAD SERVICE

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# ONLINE DOCUMENT UPLOAD SERVICE

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Our online document upload service offers you an easy and secure way of providing all the necessary documentation required to support your client's new mortgage, product transfer or further advance application.

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## LOGGING IN

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- In order to upload a document, open your browser and navigate to **<https://services.intralinks.com/login/>**
- Enter your email address and password to login.

# UPLOADING A DOCUMENT

- To upload a document, begin by double-clicking on the 'Halifax Intermediaries' exchange, or 'Halifax Premier' exchange for a new loan of £500,000 or more
- A **welcome message** will appear confirming you have selected the Halifax Intermediaries exchange or Halifax Premier exchange for a new loan of £500,000 or more
- This 'exchange' will allow you to upload documents in support of:
  - A new mortgage or remortgage
  - A Halifax premier application
  - A product transfer
  - A further advance.

Once you have selected the 'Halifax Intermediaries' change or Halifax Premier exchange for a new loan of £500,000 or more, navigate to the 'tasks' tab.

- **By Process Name or By Task Name**
  - 'By Process Name' is the option you need to upload a new document
  - After selecting 'By Process Name', click the 'Actions' drop-down and then select 'New To Do or Submission'
  - A screen will appear entitled 'Select Business Process'. There will be two options available:
    - Document upload – **New applications**
    - Document upload – **Product transfer and Further advance.**
  - Select the option which relates to the application type you have keyed via Halifax Intermediaries Online
  - Select 'Continue' to begin the document upload process.
- Once you have selected 'Continue' you will be taken to the 'Instructions for Document Submission' page. This page provides helpful guidance on uploading your submission. Once reviewed, select 'Next'
- Next is the 'Attach Document' screen. On this screen you will be able to add documents along with any supporting notes. This screen will ask you to specify a 'Process Instance'\* name

**\*Process Instance – You need to ensure that the Mortgage Application number is entered in full, followed by Surname and First Name of the Primary Applicant. Failure to enter the details in this format may result in delays in processing the application.**
- After attaching the document you will need to specify the 'Document Type'. Once completed, select 'Save'. **Please note multiple documents can be uploaded.**

You can check the status of the documents uploaded at any time by logging in and selecting the 'Process' view within the 'Tasks' tab.



## SERVICE EXCELLENCE

- Once all the required documents have been uploaded, the next step is to contact our dedicated case handling teams:
  - New Application dedicated business case handling team – **0345 030 6253**
  - Product Transfer and Further Advance dedicated business case handling team – **0345 901 3161**.

## DOCUMENT UPLOAD TECHNICAL SUPPORT

For registration assistance or technical help contact **0800 358 0015**.

