



Clydesdale
Bank

Intermediaries online application – frequently asked questions

Q. Can the online application system be used for all application types?

- A. The online application can be used for all new residential or buy to let applications, purchase, remortgage, capital and interest and interest only. It cannot currently be used for product transfer applications. For product transfer applications please visit www.clydesdalebankintermediaries.co.uk/product-transfers/ to use the online Product Transfer application form.

Q. How do I register for the application?

- A. By clicking on the link to login, upon which page you will notice there is a 'Register' button to click for first time users. Once registration details have been submitted, an email will be sent with a one-time link. When this link is clicked, it will take the user to the log-in page. At this point you will be required to contact the Helpdesk to complete the registration process before you can access this link to log in.
- If the one-time link is used more than once it will result in an error message however this will not lock the account and the user should return to the log in page and complete log in.
- If the registration email is not received within 30 minutes it means either an incorrect email address was supplied or that your firewalls are preventing the email being received – you should retry registration and if no email is received again, contact your IT department.

Q. How do I begin an application?

- A. There are buttons on the 'My Applications' hub which allow you to select the new application type you wish. The options are 'Residential' or 'Buy To Let'.

Q. How do I know which fields are mandatory fields?

- A. The application has many fields that are mandatory and these are marked with an asterisk (*). These must be completed and if any are missed then you will not be able to submit the application.

Q. How do I add an additional applicant?

- A. There is a plus sign (+) next to the 'Applicant Information' heading which will allow you to add additional applicants. Maximum number of applicants is 2. Please note if you click on the minus sign (-) next to the 'Applicant Information' heading, this will delete the associated client without warning. If you click this in error you will be required to add an additional client and enter the full client details again.

Q. Can I make changes if I make a mistake?

- A. All fields can be edited once they have been entered, provided this is done prior to application submission. This includes the ID fields for your customer's identification.

Q. I have completed the application however the 'Submit' button is greyed out, how do I submit the application?

- A. If the 'Submit' button is greyed out it means the application is not complete. There will also be a red highlight on the 'Submit' page showing the area that has missing information. You can easily navigate to the section with missing information by checking the coloured dials next to the section headers on the left hand menu. A grey dial indicates that the section hasn't been started, and an amber dial indicates a section that is started but has missing information. A red dial indicates invalid information has been entered and requires correction. Once the sections are complete with all relevant information, all dials will become green. Please ensure the current mortgage details are entered for both applicants – this must also be completed if there is no current mortgage.

Q. How do I attach additional documentation such as the customer's bank statements etc.?

- A. Once you have successfully completed the application and fully submitted it then you will be taken to the 'Next Steps' screen where you are able to attach documents with corresponding headings. If you are back at the 'My Applications' hub after submitting an application, clicking on the 'View' button next to the application in the 'Submitted Applications' table will also take you to the 'Next Steps' screen. Once an application has been submitted, all supporting documents should be uploaded – this includes a customer declaration and direct debit mandate.

Q. Will the application ever log me off automatically?

- A. If you are inactive in the application for 30 minutes or more, you will automatically be logged off.

Q. How do I find my reference number?

- A. The reference number provided within the online application system which is printed on the app form is a submission reference number and not a case reference number. It is used for technical support purposes but should not be quoted on correspondence. After the case has been set up a case reference number starting MM will be assigned.

Q. How can I track the progress of my application?

- A. By accessing the our Case Tracker on the 'My Applications' Hub. Please refer to the Case Tracker User Guide for guidance on how to track applications.