Document Upload User Guide

This guide will provide you with an overview of the Document Upload service which is available online for you to conveniently upload supporting documentation to accompany your client's mortgage application.

Providing documents and supporting information through the Document Upload service will assist us in processing and underwriting your client's application as efficiently as possible.

Should you require any additional support in using this service, please contact our Intermediary Support Team on 0345 602 2338. Our lines are open 8am to 6pm, Monday to Friday (excluding Bank Holidays) or email us at intermediary.lending@newcastle.co.uk.

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1. Accessing the Document Upload service

The Document Upload service is available via www.newcastleis.co.uk within our logged in area and can be accessed as soon as your client's mortgage application has been submitted.

You can access the Document Upload service in two ways, via the My Cases screen, or immediately by clicking on the link on the Thank You page of the application.

Please note: We recommend that you access the Document Upload service once all documents have been scanned onto your computer to reduce the chance of the page timing out.

1.1 How to access the Document Upload service via the My Cases screen

Search for the reference number of the application you require, then select the Upload button from the Options column to access the Document Upload service.

Reference	Date Created	Created By	Client Name(s)	Loan Amount*	Case Status	Application Docs	Options
3000000000	27/08/2015 15:35:52	Test Login	Mrs Test Test	£50000	Application Submitted	Declaration / Keyed Data	View > / Tracking > / Upload >

1.2 How to access the Document Upload service via the Thank You screen

If you have already scanned your documents onto your computer prior to submitting the application, you can also access the Document Upload service immediately from the Thank You screen by clicking on the link at the bottom of the page.

Thank you for choosing Newcastle Building Society and submitting an Online Mortgage Application

Thank you for using our online application service. We hope you found it easy and convenient to use.

What's New

Document Upload
Our new Document Upload service is now available for you to use. Once you have submitted a case, return to the 'My Cases' area where you will see a button now linking you to the upload area, or alternatively, if you are ready to upload your documents immediately, please click on the link below. From here you will be able to securely send us documents associated with your case. You will also be able to view the progress of these uploads from the same area.

Case updates
We will keep you informed of the progress of your cases via email and will advise you of any outstanding requirements on a regular basis. You can also monitor progress via the case tracking screen which is accessed from your 'My Cases' screen.

Should you have any further queries, please contact our Intermediary Support Team on 0345 602 2338, or email intermediary.lending@newcastle.co.uk. Our lines are open 8am – 6pm Monday to Friday (excluding Bank Holidays).

Click here to access the Document Upload service

1.3 The Document Upload screen

Newcastle Intermediaries

Call: 0345 602 2338
Email: intermediary.lending@newcastle.co.uk

| MY CASES | MY DETAILS | MY ADMINISTRATORS | LOG OFF |

Online Reference Number : 100179978   Last Successful Login: 03/11/2015 14:38:41

Document Upload

In order to use our Document Upload service, you must scan and save your Client's document(s) onto your own computer as a PDF or image file (e.g. jpg, jpeg, tiff, tif, png). The maximum file size for an individual document is 4MB and for multiple documents, the total cannot exceed 15MB. If your document(s) exceed these limits your upload will not be permitted.

Note: If you are using Windows IE9, file sizes will not be displayed as this data is not supported by this operating system. We therefore suggest that you carefully check the size of the files on your own computer prior to uploading.

If you require further assistance using our Document Upload service, please click here to access our Document Upload User Guide.

Application Reference   100179978

Applicant 1   **Mr Tester Test**

For each document you upload, please select the relevant 'Document Type' from the dropdown list below before locating the specific file on your computer. This will help us to process your Client's application as quickly as possible.

Document Type   Please Select ▾

Please select the 'Browse/Choose File' button to locate the required document on your computer, click 'Open' to bring the file into the upload area, then click 'Add' to add the file to the upload grid. Once all required files are displayed, click the 'Upload' button to complete the upload process. We will confirm the status of your uploaded documents on screen.

[Browse...]   [Add]

File Name	Document Type	File Size	

Total File Size: N/A

Document Certification

By uploading these documents you confirm you have certified these as true copies of the originals and/or a likeness of your Client(s) where applicable. Please ensure that any sensitive personal data has been hidden e.g. card data. When you are happy with the documents you have added, please confirm by checking the confirmation box, to progress with your upload.

NOTE: Documents provided for evidence of ID and current address, must be stamped, signed and dated as certified true copies of the original and/or true likeness of the applicant where applicable, prior to being uploaded. ☐

[Upload]

Uploaded Documents

[Refresh]

| No Documents have been uploaded. |

2. Saving documents onto your computer

To avoid unnecessary delays in the processing of your client's application, please make sure you save all documents as individual files on your computer which will enable you to allocate each upload to a specific Document Type which you select online (please refer to section 3).

Scanned documents must be certified as true copies of the originals and/or a likeness of your client(s) where applicable. Please ensure that any sensitive personal data has been hidden e.g. card data. You will be asked to tick a check box to confirm that you have certified all documents (see below).

2.1 Suitable file extension types

In order to use our Document Upload service, you must scan and save your client's document(s) onto your own computer as a PDF or image file. We accept any of the following file types:

• PDF
• jpg
• jpeg
• tif
• tiff
• png

You will be shown an error message on screen if you attempt to upload a file with any other extension. If this occurs, please re-save the document as an acceptable file type and try to upload again.
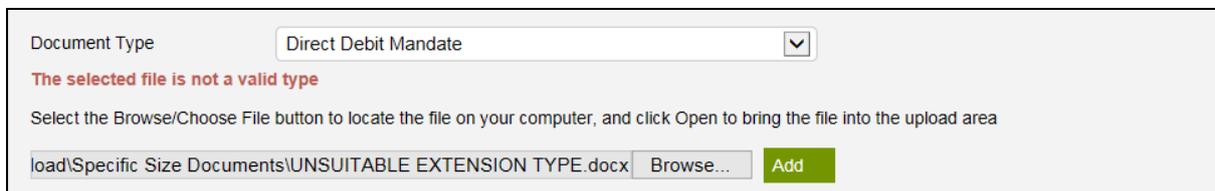
2.2 Acceptable file sizes

Each individual file must not exceed 4MB and when multiple documents are added to the upload at once, the total file size must not exceed 15MB.

If your document(s) exceed these limits, your upload will not be permitted and error messages will be displayed (see below).
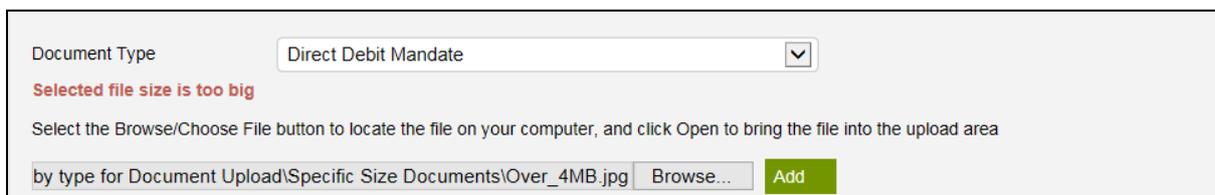
Please note: If you are using Windows IE9, file sizes will not be displayed. We therefore suggest you carefully check the size of the files on your own computer prior to uploading or try using a different browser e.g. IE10, IE11, Chrome or Firefox.

There is no restriction on the number of documents you can upload per application, however if you need to upload over 15MB of documents, you will need to complete separate uploads.

2.3 Total File Size

The total file size is displayed below the document upload grid and while the document total is below 15MB, this will be displayed in green. Once the total file size exceeds the maximum total file size of 15MB, this will change to red and an error message will be displayed.

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Document Type   Declaration (Signed)   ⌄

The total selected files are too big. Please delete some and upload them separately

Please select the 'Browse/Choose File' button to locate the required document on your computer, click 'Open' to bring the file into the upload area, then click 'Add' to add the file to the upload grid. Once all required files are displayed, click the 'Upload' button to complete the upload process. We will confirm the status of your uploaded documents on screen.

[   ] Browse...   Add

File Name	Document Type	File Size	
Exactly_4MB.jpg	Accounts Applicant 1	4.00MB	Delete
Exactly_4MB - Copy (12).jpg	Bank Statement(s) (Personal) Applicant 1	4.00MB	Delete
Exactly_4MB - Copy - Copy.jpg	ID Applicant 1	4.00MB	Delete
Exactly_4MB - Copy (2).jpg	Declaration (Signed)	4.00MB	Delete

Total File Size: 16 MB

3. Selecting the Document Type

Once you have scanned all documentation onto your own computer, you are ready to begin using our Document Upload service. The first step is to select the relevant Document Type (see below).

Please take the time to make an accurate selection from our comprehensive Document Type dropdown list, as making the most suitable selection per document will help us to process the documentation as quickly as possible.

Where the application is in joint names, it is preferable to select which applicant the document applies to.

3.1 Adding notes to support your Client's application

Notes should only be added to the system to provide us with appropriate additional information about your client's application.

We require any supporting notes to be uploaded against the Document Type 'Broker Communications' which will enable us to identify the notes without delay.

4. Selecting files from your computer

Click the 'Browse/Choose File' button (the name of the button differs by browser) to locate the required document on your computer.

Find the file you wish to upload and highlight it so it is displayed in the File name box at the bottom of the window.
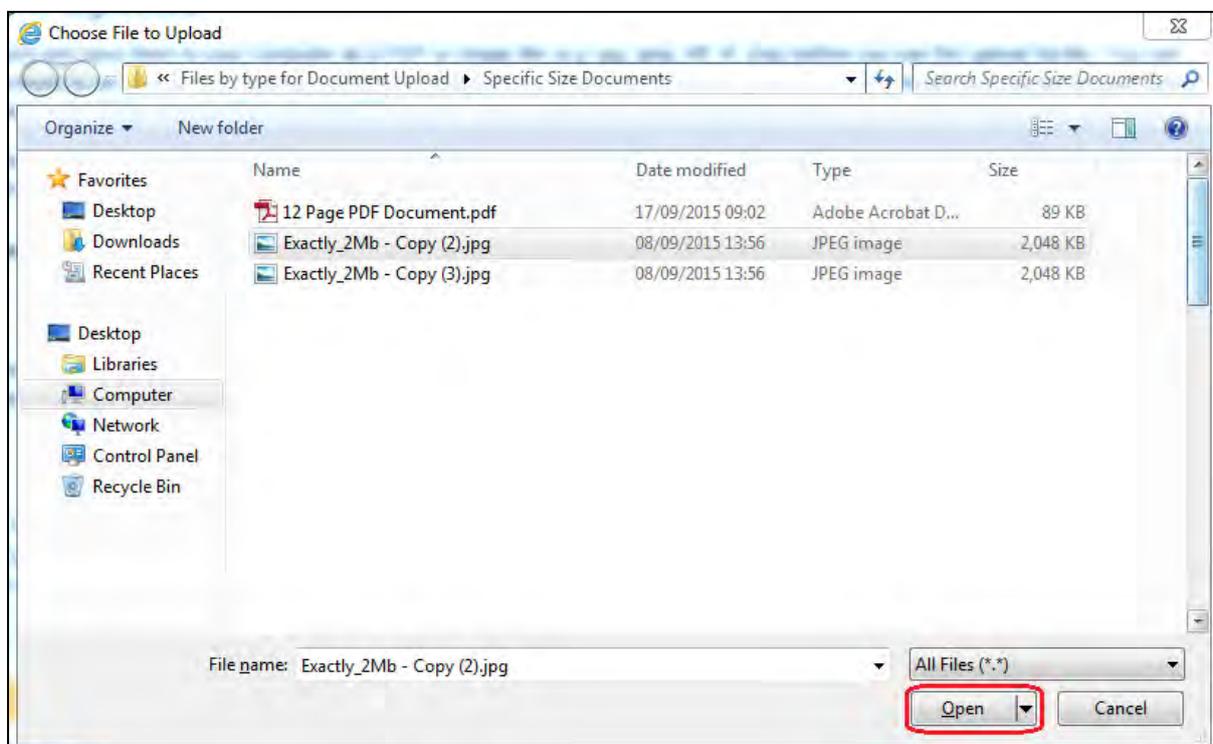
Click 'Open' alongside the selected file to bring the file into the upload area.

Once the file is displayed in the text box, click the 'Add' button to add the file to the upload grid.

Document Type	Please Select ⌄

Please select the 'Browse/Choose File' button to locate the required document on your computer, click 'Open' to bring the file into the upload area, then click 'Add' to add the file to the upload grid. Once all required files are displayed, click the 'Upload' button to complete the upload process. We will confirm the status of your uploaded documents on screen.

	Browse...	Add

File Name	Document Type	File Size	
Exactly_2Mb - Copy (2).jpg	ID Applicant 1	2.00MB	Delete

Repeat the steps above for each document you wish to upload until all required files are displayed in the upload grid.

5. Uploading the documents

Please read the Document Certification statement shown below then tick the check box to confirm that you have certified all of the documents being uploaded, then click the 'Upload' button to send the documents to us.

Document Certification

By uploading these documents you confirm you have certified these as true copies of the originals and/or a likeness of your Client(s) where applicable. Please ensure that any sensitive personal data has been hidden e.g. card data. When you are happy with the documents you have added, please confirm by checking the confirmation box, to progress with your upload.

NOTE: Documents provided for evidence of ID and current address, must be stamped, signed and dated as certified true copies of the original and/or true likeness of the applicant where applicable, prior to being uploaded ☑

Upload

If the check box has not been selected, an error message will be displayed to advise that this must be selected in order to proceed with the upload.

File Name	Document Type	File Size	
Proof of ID - Applicant 1 - JPG_JPEG File.JPG	ID Applicant 1	0.04MB	Delete
Proof of ID - Applicant 2 - JPG_JPEG File.JPG	ID Applicant 2	0.04MB	Delete
Bank Statement App 1.jpg	Bank Statement(s) (Personal) Applicant 1	0.14MB	Delete
Payslip - Applicant 2 - JPG_JPEG File.JPG	Payslip(s) Applicant 2	0.05MB	Delete

You must confirm you have certified the document(s) you wish to upload before proceeding

Document Certification

By uploading these documents you confirm you have certified these as true copies of the originals and/or a likeness of your Client(s) where applicable. Please ensure that any sensitive personal data has been hidden e.g. card data. When you are happy with the documents you have added, please confirm by checking the confirmation box, to progress with your upload.

NOTE: Documents provided for evidence of ID and current address, must be stamped, signed and dated as certified true copies of the original and/or true likeness of the applicant where applicable, prior to being uploaded ☐

Upload

Uploaded Documents

No Documents have been uploaded.

All documents which have been uploaded will appear in the Upload Documents grid at the bottom of the screen and will display the file name for your reference so you can see which document(s) you have already uploaded.

Document Certification

By uploading these documents you confirm you have certified these as true copies of the originals and/or a likeness of your Client(s) where applicable. Please ensure that any sensitive personal data has been hidden e.g. card data. When you are happy with the documents you have added, please confirm by checking the confirmation box, to progress with your upload.

NOTE: Documents provided for evidence of ID and current address, must be stamped, signed and dated as certified true copies of the original and/or true likeness of the applicant where applicable, prior to being uploaded ☐

Upload

Uploaded Documents

File Name	Document Type	Uploaded Date	Received
Proof of ID - Applicant 1 - JPG_JPEG File.JPG	ID Applicant 1	15/09/2015 12:43	Pending

6.   Status of your uploaded documents

The status of your uploaded documents will be displayed as Pending, until they have been verified by us.
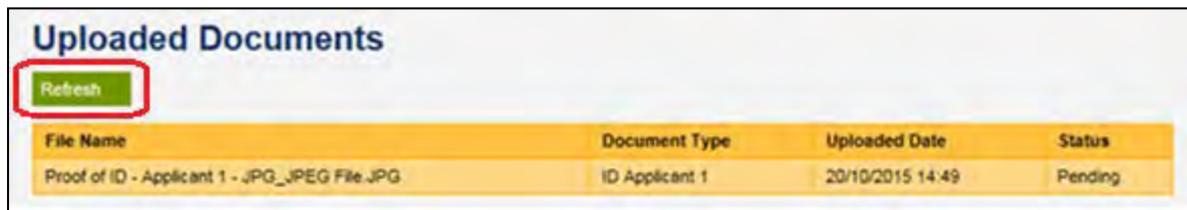
Once the files have been verified, the status against each document will change to either Received or Failed.

6.1   Refreshing the status of your uploaded documents

The Document Upload page must be refreshed before you will see the updated status of your uploaded documents. The simplest way to do this is to click the Refresh button as shown in the screenshot below. Alternatively, you can exit the case by returning to the My Cases screen, then go back into the Document Upload screen again.

6.2   What happens if my uploaded document fails?

If the document(s) uploaded fail the verification process, we will send you an email to let you know. Although this will be rare, it can happen for a number of reasons. We recommend you try to upload the document(s) again. If you continue to experience problems you will be required to contact our Intermediary Support Team (please refer to section 8).

7. Uploading documents to another application

Should you wish to upload documents to a different application, please return to the My Cases screen, search for the applicable case using the Online Reference number or Surname of your client(s) then select the Upload button. In order to upload documents the application MUST have been submitted. Once you are in the required case, please follow the same process.

8. Queries and problems

Should you require any additional support in using this service, please contact our Intermediary Support Team on 0345 602 2338. Our lines are open 8am – 6pm Monday to Friday (excluding Bank Holidays) or email us at intermediary.lending@newcastle.co.uk.