

Intermediary administrator case tracking guide

The case tracking service will enable your administrators to track your client's cases and upload documentation.

How to use the case tracking and document upload service

1. Your administrator will be able to access the case tracking service by logging in to www.wbfi.co.uk/case-tracker
2. Please complete the required information:
 - Applicant's Date of Birth
 - Applicant's Current Postcode
 - Applicant's Application Reference Number.

Help Contact Us

This site is for the use by approved partners of the West Brom for Intermediaries and is not intended for public or consumer use.

Please enter your details to login

Applicant Date of Birth

Applicant Current Postcode

Application Reference Number

Proceed

Need any help?



FAQs

FAQs have been provided to support you with our most common queries.

View FAQs



Give us a call

Our Intermediary Sales and Support team are on hand to help.
Our lines are open 9.00am to 5.00pm Monday to Friday.

0345 241 3597



Send us a message

Send us a message and one of our experts will get back to you.

Send Message

3. Case details will be displayed – case status and outstanding documents.

The screenshot displays the user interface for the West Brom for intermediaries portal. At the top left is the logo for 'the West Brom for intermediaries'. On the top right are links for 'Help', 'Contact Us', and 'Log Out'. Below the logo is a disclaimer: 'This site is for the use by approved partners of the West Brom for Intermediaries and is not intended for public or consumer use.' The main content is divided into three sections: 'Application at a glance', 'Overview of your application', and 'Outstanding Documents'. The 'Application at a glance' section contains three panels: 'Mortgage Application Details' with application and broker information, 'Current Application Status' showing 'Application Reviewed' with a 'View Full Status' button, and 'Outstanding Documents' with a 'View document list' button. The 'Overview of your application' section features a vertical timeline of application stages. A green arrow points from a callout box to the 'Application Submitted 18-02-2019' stage, which is marked with a green checkmark. The 'Outstanding Documents' section lists three documents to be uploaded: 'Applicant one - Evidence of deposit', 'Applicant one - bankruptcy order', and 'Applicant two - bankruptcy order', each with an 'Upload' button. A callout box with a green border states: 'Each stage of the application status is date stamped to indicate when it was completed.'

the West Brom
for intermediaries

Help Contact Us Log Out

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Application at a glance

Mortgage Application Details

Application Number: XXXXXXXX4203
Applicant one – Joe Bloggs
Applicant two – Sue Bloggs
Broker: Broker Name
Broker Email: brokername@broker.co.uk
Broker Tel No: 0123456789

Current Application Status

Application Reviewed

[View Full Status](#)

Outstanding Documents

There are documents which we require to support this application. Please view the outstanding documents listed below.

[View document list](#)

Overview of your application

Current Application Status

- Application Submitted 18-02-2019 ✓
- Application Reviewed ←
- Valuation Instructed
- Valuation Received
- Offer Issued
- Certificate of Title Received
- Application Completed

Outstanding Documents

There are documents which we require to progress this application. Please view the full list of outstanding documents required below. Documents will be removed from this list once they have been checked by our Mortgage team. Although the Mortgage team work to a 48 hour SLA, we consistently review supporting documentation within 24 hours.

There may be occasions where bespoke documents are required which may still need to be uploaded by the main user login. We will email the registered user to alert them to any bespoke requests.

Please ensure that the document(s) being uploaded relate to the applicant(s) for this specific case.

Failure to do so will result in a breach of the General Data Protection Regulations.

- Applicant one - Evidence of deposit [Upload](#)
- Applicant one - bankruptcy order [Upload](#)
- Applicant two - bankruptcy order [Upload](#)

Each stage of the application status is date stamped to indicate when it was completed.

Please note that there may be occasions where specific documents are required, which will need to be uploaded by the broker using the intermediary portal.

4. From here you will be able to upload documents by clicking on upload.

Outstanding Documents

There are documents which we require to progress this application. Please view the full list of outstanding documents required below. Documents will be removed from this list once they have been checked by our Mortgage team. Although the Mortgage team work to a 48 hour SLA, we consistently review supporting documentation within 24 hours.

There may be occasions where bespoke documents are required which may still need to be uploaded by the main user login. We will email the registered user to alert them to any bespoke requests.

Please ensure that the document(s) being uploaded relate to the applicant(s) for this specific case.

Failure to do so will result in a breach of the General Data Protection Regulations.

Documents successfully uploaded in this session: 1

Applicant one - Evidence of deposit Upload

T:\Evidence of deposit.docx Browse... Submit

✓

Applicant one - bankruptcy order Upload

Applicant two - bankruptcy order Upload

A message and green ticks will indicate the number of documents successfully uploaded during each session.

For bespoke checklist items, you will be able to upload documents and respond to queries raised, when applicable.

Confirm link to 309 High Street Upload Respond

Explanation required for the £300 Barclays payment Upload Respond

Add a Comment ×

Please submit your comment below and submit.

Send

A comment box will open to enable a response to a query to be submitted.

Mortgage Tracker service for your clients

Your client's will be able to track their mortgage application with the West Brom using the Mortgage Tracker service. Please note that your clients will not be able to upload checklist items.

The screenshot displays the 'Mortgage Tracker' service interface for 'the West Brom'. At the top, there is a navigation bar with 'Help', 'Contact Us', and 'Log Out' links. The main heading is 'Track Your Mortgage'. Below this, there are three summary cards: 'Mortgage Application Details' (listing application number, applicant name, broker name, email, and tel no), 'Current Application Status' (showing 'Application Reviewed' with a 'View Full Status' button), and 'Outstanding Documents' (with a 'View document list' button). A large 'Overview of your application' section follows, containing a vertical timeline of steps: 'Application Submitted 02-04-2019' (checked), 'Application Reviewed' (checked), 'Valuation Instructed', 'Valuation Received', 'Offer issued', 'Certificate of Title Received', and 'Application Completed'. To the right of the timeline is an 'Outstanding Documents' list with a note: 'Please note, all required documents must be sent to your broker.' Below the overview, there are links for 'FAQs' and 'Contact your broker', each with a 'View FAQs' or '0123456789' button.

To enable your clients to log in and use this service you will only need to provide them with the website address **www.westbrom.co.uk/mortgage-tracker** and their mortgage application reference number as they need to provide the same information administrators need to log in.



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Calls and electronic communications may be monitored and/or recorded for your security and may be used for training purposes. Your confidentiality will be maintained. The West Brom is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Register No: 104877. 'the West Brom' and 'the West Brom for intermediaries' are trading names of West Bromwich Building Society.

