


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.



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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



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

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

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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

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

Applicant one - bankruptcy order

Applicant two - bankruptcy order

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.

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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.

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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 West Brom

Help

Contact Us

Log Out

Track Your Mortgage

Application of a glance

Mortgage Application Details

Application Number: XXXXXX04264
Applicant one - John Smith
Broker: Broker Name
Broker Email: brokername@broker.co.uk
Broker Tel No: 0123456789

Current Application Status

Application Reviewed

Your application has been reviewed by our Mortgage team. Any supporting documentation that is required will be listed in 'Outstanding Documents'.

View Full Status

Outstanding Documents

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

View document list

Overview of your application

Current Application Status

Application Submitted 02-04-2019

Your application has been submitted to us. A member of our Mortgage team will review the documentation that has been provided.

✓

Application Reviewed

Your application has been reviewed by our Mortgage team. Any supporting documentation that is required will be listed in 'Outstanding Documents'.

➔

Valuation Instructed

A valuation has been requested.

Valuation Received

A valuation has now been completed.

Offer issued

Good news, we have sent your mortgage offer to you.

Certificate of Title Received

We have received the Certificate of Title document from your solicitor.

Application Completed

Congratulations, your mortgage has completed and you will receive a letter to confirm what your mortgage payments will be.

Outstanding Documents

Any documents required from you in order to progress your application will be listed here and have been requested from your broker. Documents will only be removed from this list once they have been checked by our Mortgage team. If you have previously provided documents to your broker and they are still listed below, please allow up to 2 working days for these to be checked and approved.

There may be occasions where specific documents are required which will not appear in this list, if this occurs you will be advised by your broker.

Please note, all required documents must be sent to your broker.

If you have any questions regarding your application or outstanding documents please contact your broker.

Applicant one - Evidence of deposit

Applicant one - latest month's payroll or last four weeks' paylips

Applicant one - latest P60/March paylip(s)

Applicant one - Signed Declaration and Direct Debit mandate

Need any help?

FAQs

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

View FAQs

Contact your broker

If you have any queries about your application please contact your broker.

0123456789

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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Intermediary Sales and Support team
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www.westbrom.co.uk

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