



Broker Portal

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We've made some changes to our portal. This handy user guide will show you how to submit your mortgage application.

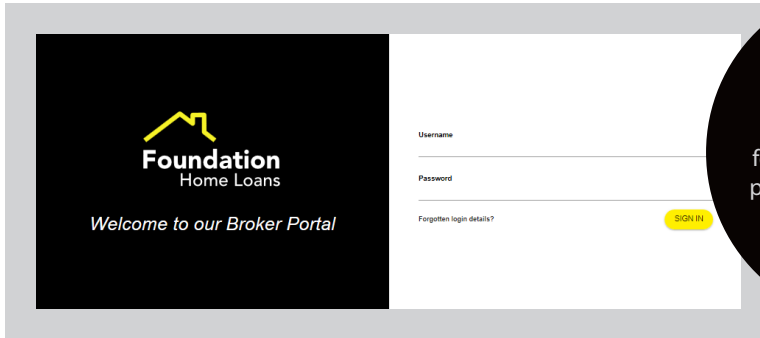
Here's what we will cover:

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1 Logging in and the portal tour

1A

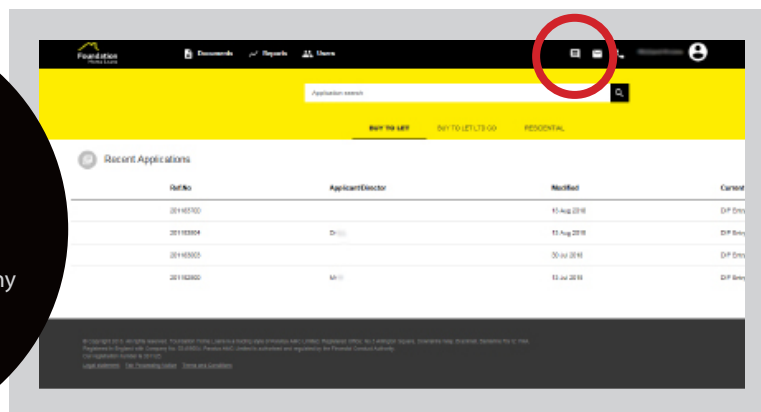
Once you have completed our online registration form your username and password will be emailed within 24 hours.



1B

The portal tour will start automatically when you have logged in and accepted the terms and conditions.

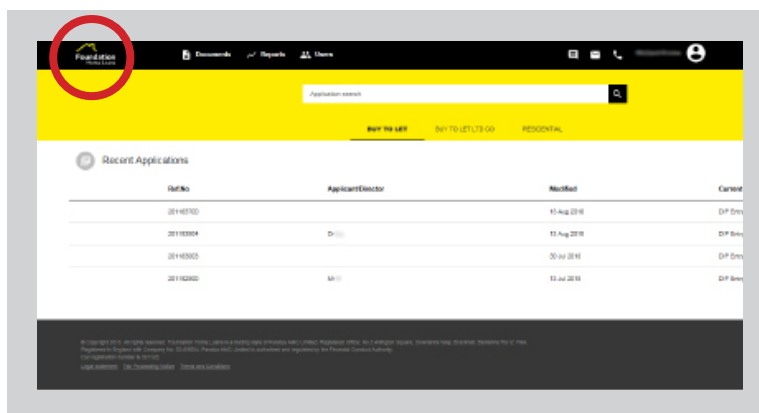
Should you leave the tour at any point, you may start it again by clicking



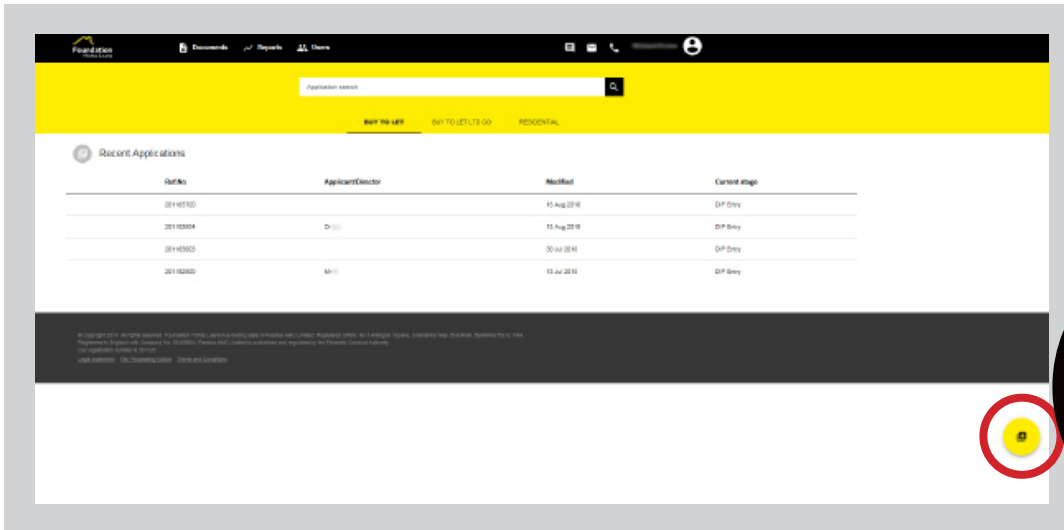
1C

From the homepage you can create a new application, access your previous applications and reports.


TIP: to return to the homepage click the Foundation Home Loans logo top left.



2 Create a DIP

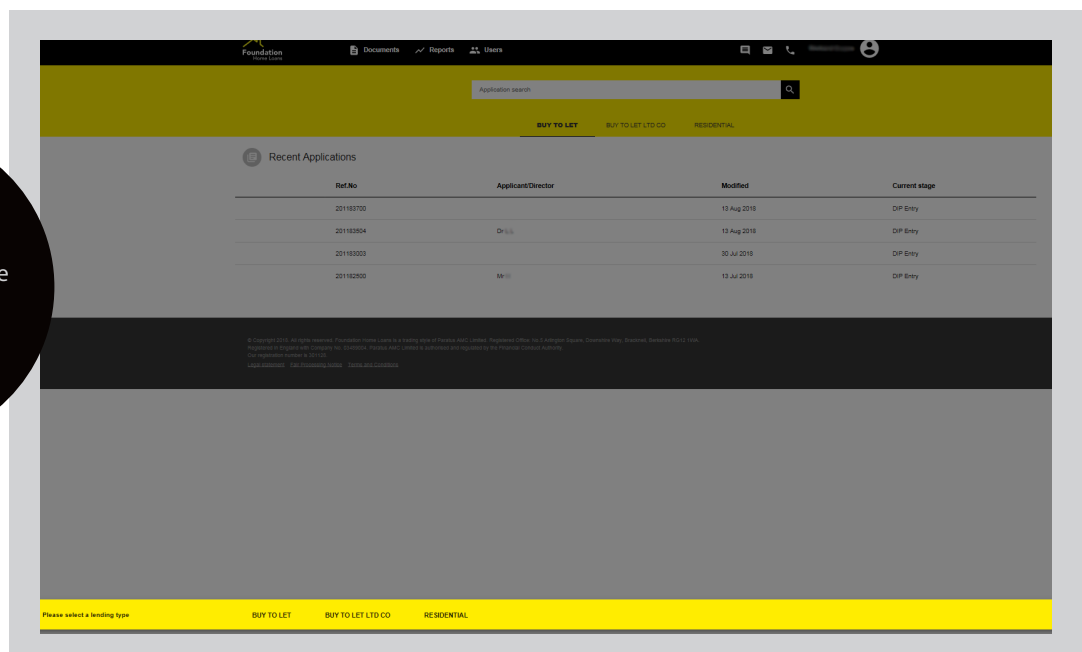


2A

To create a new application click  in the bottom right hand corner.

2B

A pop up banner will appear, select the lending type and click create DIP.

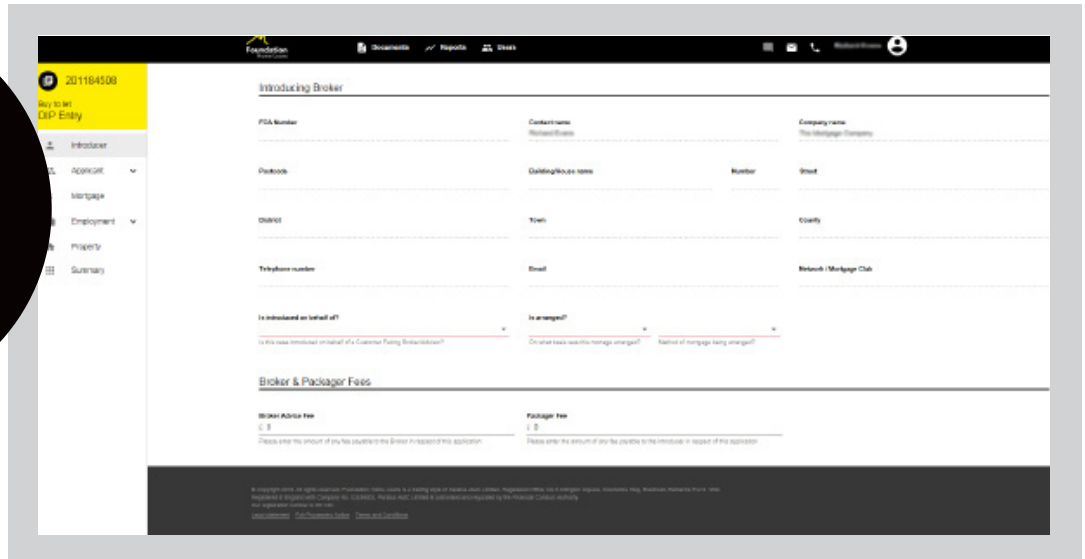


3 Introducer page

3A

Complete the fields on the Introducing Broker page.

TIP: The fields highlighted red need to be filled out in order to complete the DIP entry.

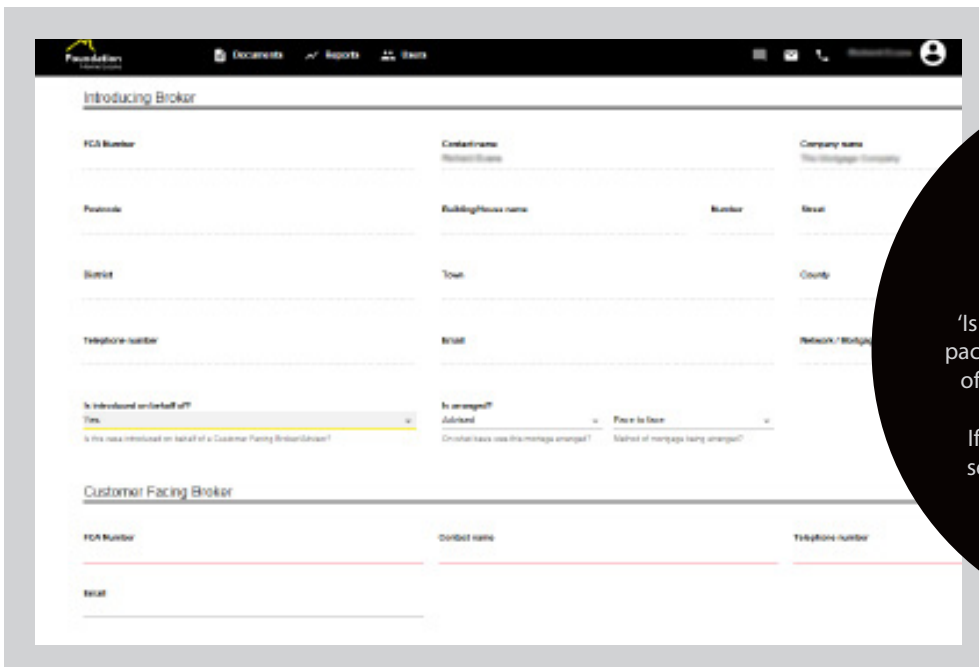


3B

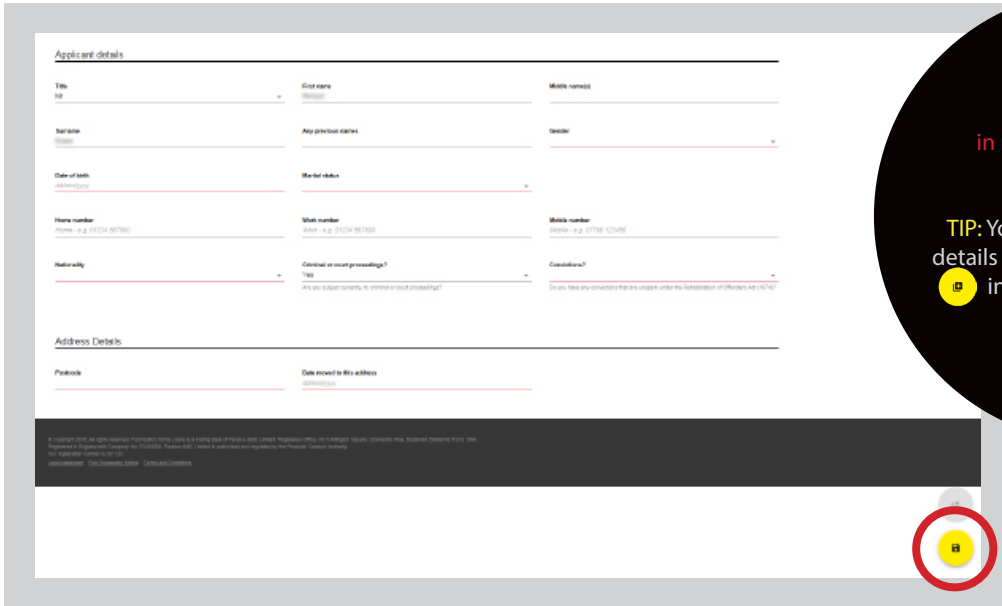
Introducing Broker - the details of the person keying the case and the company they work for will be automatically populated.

'Is introduced on behalf of?' if you are a packager, please select 'Yes' so the details of the advising broker can be entered.

If you are the advising broker, please select 'No'. 'Is arranged?' please select either advised or non-advised and whether face to face or non-face to face.




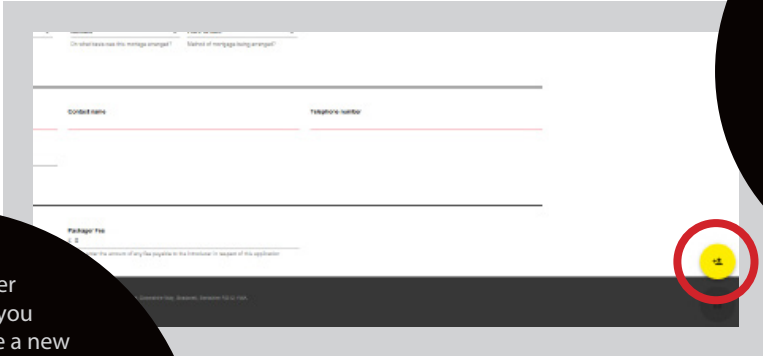
4 Completing applicant/s details




4A

Complete all fields **highlighted in red** on the application details page.

TIP: You can save the applicant details at any point by clicking  in the bottom right hand corner.



4B

You can create a new applicant by clicking  in the bottom right of the screen.

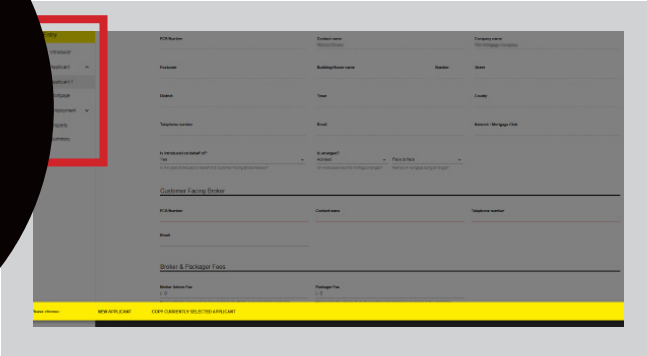
TIP: You will not be able to create a new applicant until you have saved the existing applicant detail page.

4C

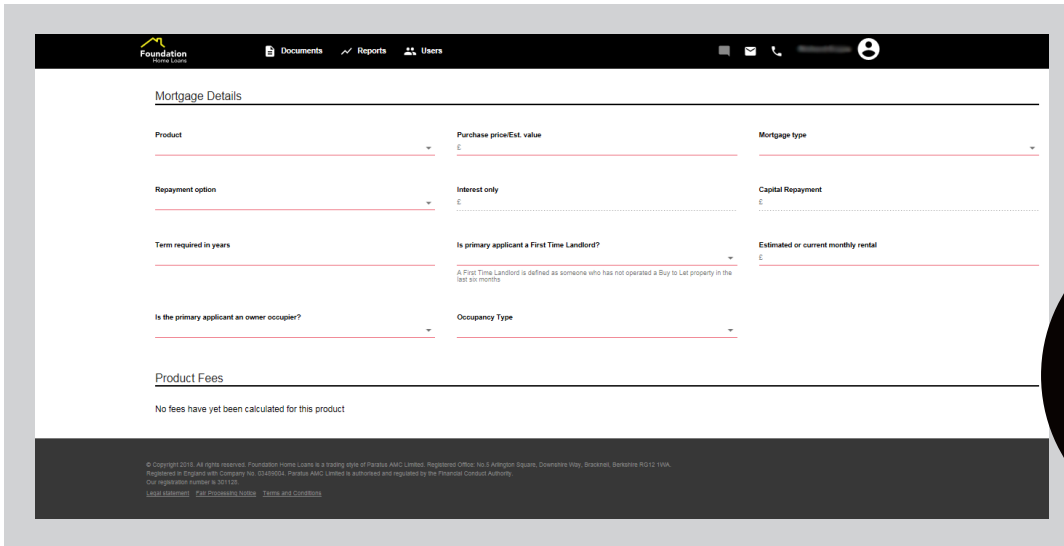
A yellow banner will appear and you can choose to create a new applicant or copy the currently selected applicant.

Once you have chosen, the new applicant will appear in the side bar.

You will be returned to applicant 1, you need to select applicant 2 from the side bar and complete all fields **highlighted in red** until applicants are completed.

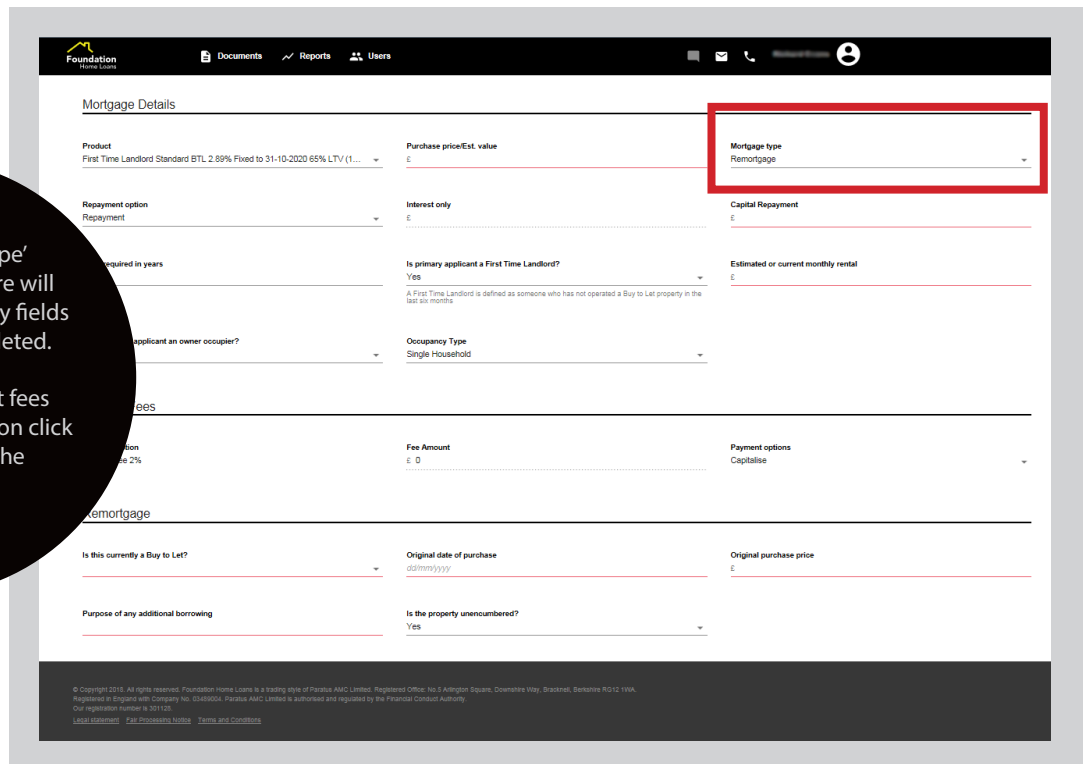


5 Completing mortgage details




5A

Complete all fields highlighted in red on the mortgage details page.



5B

When 'mortgage type' has been selected there will be additional mandatory fields that need to be completed.

TIP: To see the product fees related to your application click  bottom right of the screen.

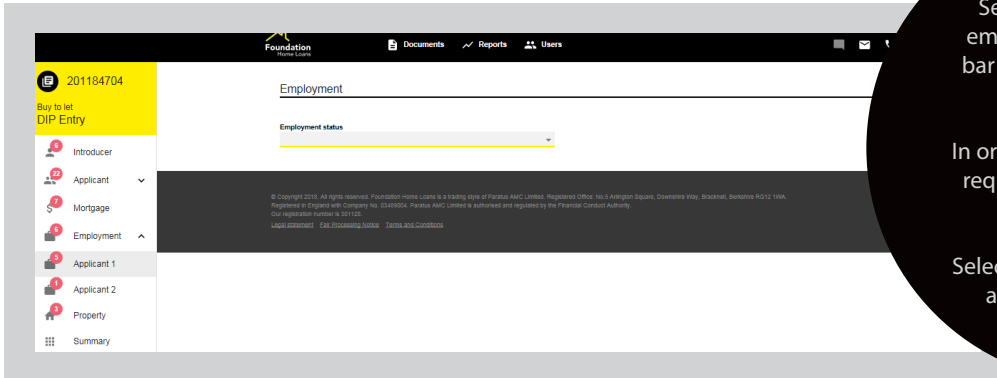
6 Employment and property details

6A

Select applicant 1 under employment from the side bar to complete the first set of details.

In order to reveal all the fields required you need to select 'employment status'.

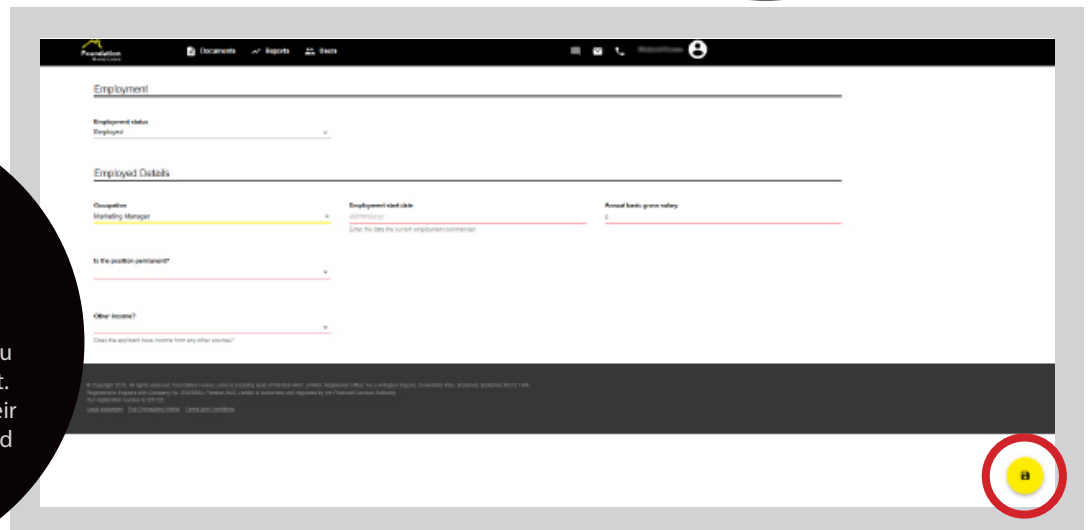
Select additional applications and repeat as required.



6B

Complete all fields highlighted in red on the employment status page.

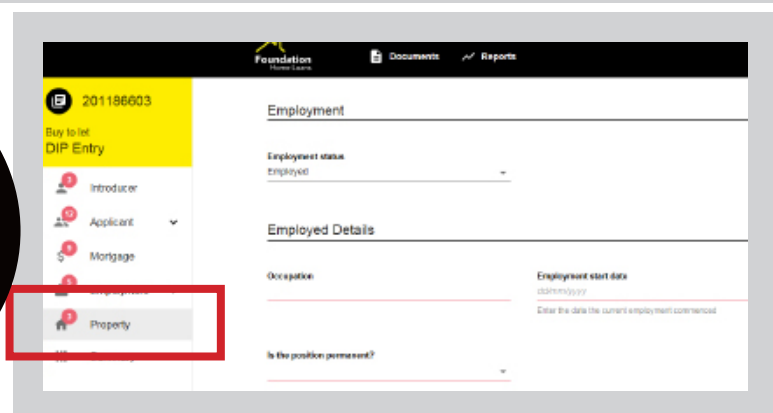
TIP: Make sure you save the employment details before you move on to the next applicant. All applicants need to have their employment details completed including their income.



6C

Select property details from the side bar.

Complete all fields highlighted in red on the property details page.



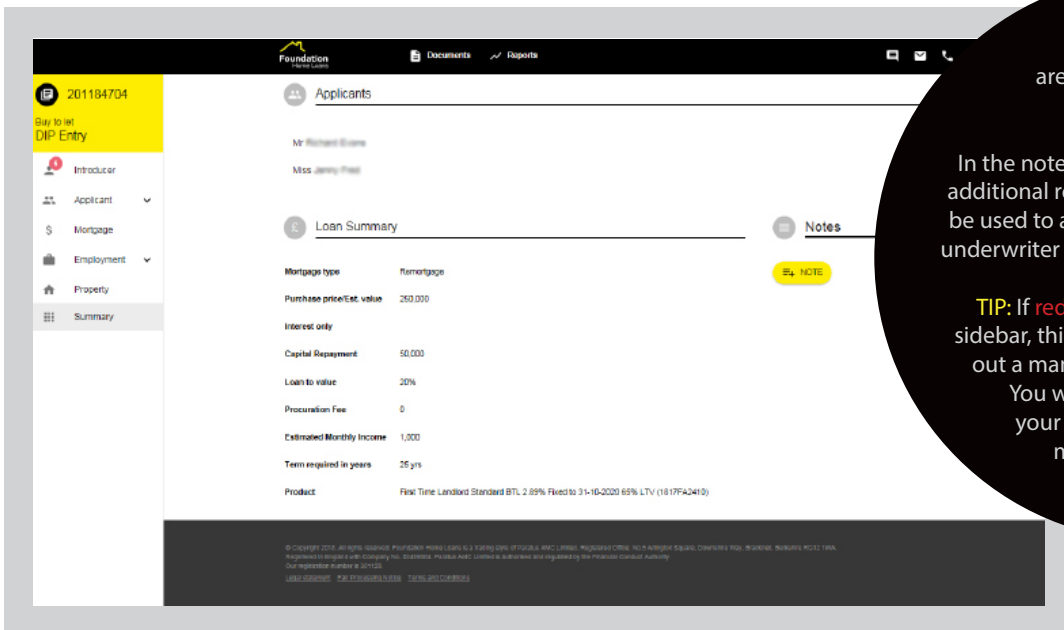
7 Case summary and submission

7A

Check the details are accurate on the case summary page.

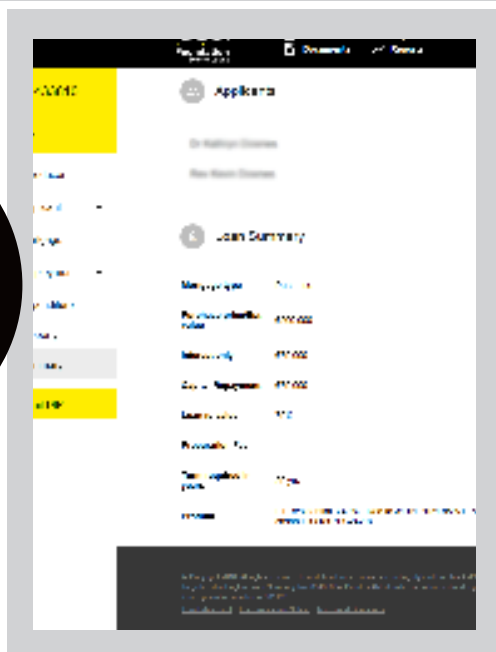
In the notes section you can upload any additional relevant information or this can be used to answer any questions from the underwriter as your application progresses.

TIP: If red numbers appear along the sidebar, this indicates you have not filled out a mandatory field in that section. You will not be able to submit your DIP application until all mandatory fields are completed.



7B

To submit your DIP you need to accept our terms and conditions and then click the 'Submit DIP' button.



8 Proceed to full mortgage application

8A

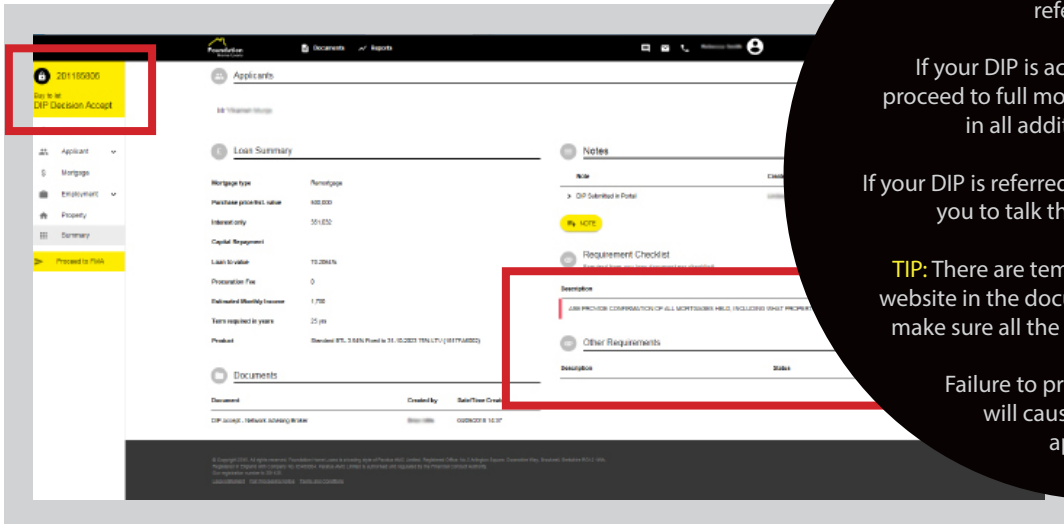
Once you have submitted your DIP the decision to accept, decline or refer is instant.

If your DIP is accepted you will need to proceed to full mortgage application and key in all additional information.

If your DIP is referred the underwriter will contact you to talk through the next steps.

TIP: There are templated documents on our website in the document library; this will help make sure all the information is completed.

Failure to provide all information will cause a delay in your application.

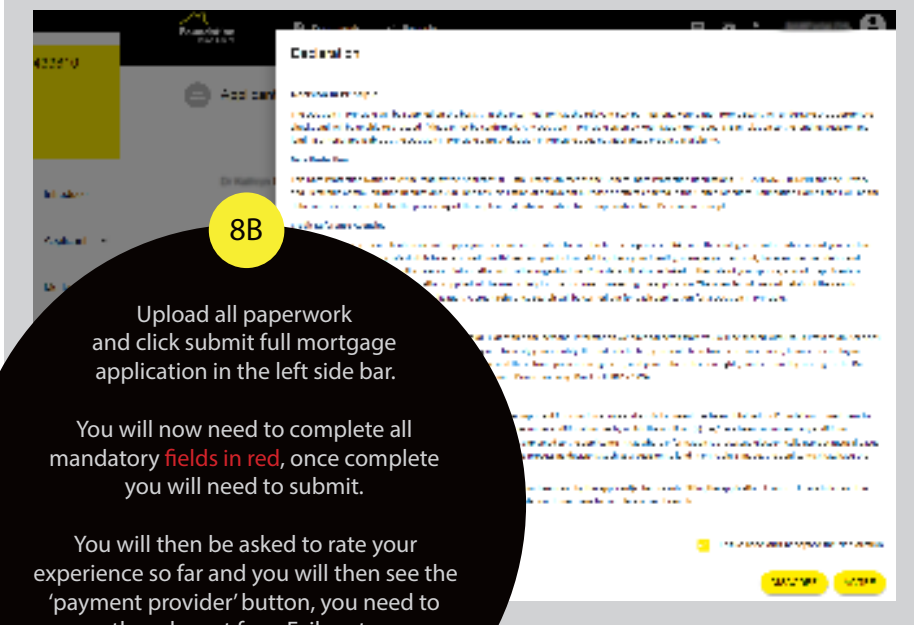


8B

Upload all paperwork and click submit full mortgage application in the left side bar.

You will now need to complete all mandatory **fields in red**, once complete you will need to submit.

You will then be asked to rate your experience so far and you will then see the 'payment provider' button, you need to pay the relevant fees. Failure to pay the fees when submitting could cause a delay in your case.



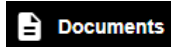
9 Top tips for a successful application

Submission of documents

When you submit your mortgage application only send us the documentation we have requested in the check list. Every application requires proof of income. Only one document can be uploaded per requirement. You will need to merge into one document.

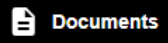
Document certification

All documents submitted are required to be certified. You can find the submission requirements on our portal in



Document templates

We provide document templates on our portal in



to help you submit the right documentation.

Proof of residency

All applicants must provide at least three years address history.

Proof of income (employed)

All applicants must provide the latest months' payslips or the last four consecutive weeks for buy to let. Three months of pay slips and P60 are required for residential. For the latest criteria guidelines check our website.

Proof of income (self-employed)

All applicants must show a full year of accounts for buy to let and two years for residential. If accounts cannot be provided last year's SA302 or a tax calculation supported by HMRC tax year overview and signed by an accountant can be provided. For the latest criteria check our website

Payment of fees

When progressing to full mortgage application make sure that you pay any fees at the same time as submitting. Not making payment could result in a delay in your application.

10 Frequently asked questions

I have forgotten my username or password?

Select forgotten details on the login page of the portal. Select if you have forgotten your username or password. We will then email your username or a link to change your password.

I need some help submitting my application

You can call 0344 770 8032 for help between the hours of 9am-5:30pm, Monday to Friday.

What is the status of my application?

The status of your application is shown on the homepage of the portal in the far right column. If you have navigated away from the homepage click the Foundation Home Loans logo in the top left of the screen to return.

How long will it take to know if my DIP has been accepted?

DIP to accept or decline is an instant decision, unless the case is referred to our underwriting team. For our latest application service times go to our website homepage.

Where can I find out which documents I need to submit? And who they need to be certified by?

The checklist of documents required for your application is listed once you have submitted your full mortgage application. There is help text for each document listed alongside or the document submission requirements can be found at;
www.foundationforintermediaries.co.uk/document-library

I need to see a summary of all the applications I have submitted?

A summary is shown on the homepage of the portal. If you have navigated away from the homepage click the Foundation Home Loans logo in the top left of the screen to return.

Where is my application reference number?

You can find this on the portal homepage under ref.no or on the right hand side of the screen when in your application.