

**Chorley  
Building  
Society**

TRUSTED SINCE 1859



# Submit a Mortgage Application

**Intermediary Use Only**



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# Complete Application Stage

Once your DIP has been approved you will be able to complete the Mortgage Application and submit this together with any required documentation.

You should access the case from the **Your cases** and select **Continue**.

The screenshot shows a web interface for managing cases. At the top, there are navigation links for 'Cases', 'Clients', 'Products', and 'Lending Criteria'. Below this is a 'Cases' header with a search bar and a 'Start New Case' button. The main area contains a table with the following data:

Case Id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email
6997	Application	Submitted	2 Year Discount 60% LTV - IP241	150,000.00	60	12/08/2024		<a href="#">View</a>
6996	DIP	Active		200,000.00	57.14	07/08/2024		<a href="#">Continue</a> <a href="#">View</a>

The status bar on your case will have been updated and the **Application** stage will have turned dark **BLUE**. You should select this in order to proceed to complete all required information.

The screenshot shows the 'Application' stage interface. At the top, there is a progress bar with four steps: '01 | Applicants', '02 | DIP', '03 | Application' (highlighted in a purple box), and '04 | Complete'. Below this is a sidebar with a menu for 'Application' containing: Page 1, Applicant Details, Employment Details, Self Employed Details, Page 2, Page 3, Documents, Declarations, Fees, and Your Submission. The main content area is titled 'Applicant Details' and shows the following information for Jane Jones (Main Applicant):

- Enquiry Type: Standard
- Society Account Numbers: Society Account Numbers
- Title: Mrs
- Surname(s): Jones
- Firstname(s): Jane

You will then need to complete all steps for the application in the same way as you did for the DIP until all required steps have been fully completed.

## Select Mortgage Product

The application will pre-populate with all products that meet the criteria for the loan you are submitting. You should select from the dropdown list the product that you have recommended.



### Loan Requirements

Jane Jones (Main Applicant)

Please select

#### Residential

- 2 Year Discount 60% LTV - IP241
- 2 Year Discount 60% LTV Remortgage - IP244
- 2 Year Discount 80% LTV - IP242
- 2 Year Discount 85% - IP207
- 2 Year Discount 90% LTV - IP243
- 2 Year Discount 95% - IP209
- 2 Year Fixed 90% LTV (fixed until 30.06.2026) - IP233
- 2 Year Fixed 95% LTV (fixed until 30.06.2026) - IP234
- Credit Renew 1 – 2 Year Discount 60% LTV - IP186
- Credit Renew 1 – 2 Year Discount 75% - IP218
- Credit Renew 2 – 2 Year Discount 60% - IP219
- Credit Renew 2 – 2 Year Discount 70% - IP220
- DMS 2 Year Discount 95% LTV (20% OMV Discount) - IP223
- DMS 2 Year Discount 95% LTV (30% OMV Discount) - IP224
- First Homes 2 Year Discount 95% LTV - IP222
- Help to Buy (Wales) 2 Year Discount 75% LTV - IP225
- Later Life - 2 Year Discount 75% - IP238
- Later Life 2 - 2 Year Discount 60% - IP211

Please select

## Upload Documents

You should upload any documents or information that were requested in your **DIP Acceptance Email** by selecting **Upload File**



### Documents

#### Documents Required

Please upload supporting documentation:

Jane Jones : Main Applicant

Category	Document Name	Delete
No existing client documents		

Upload File

John Jones : Applicant 2

Category	Document Name	Delete
No existing client documents		

Upload File

You will then be able to select a **Category** for the document you are uploading from the dropdown list.

Jane Jones : Main Applicant

File to upload  No file chosen  
 Please select a file of type jpg/png/pdf with a file size less than 4MB

Category  
 Please select

- General --
- Proof Of Personal Identification
- Proof Of Address Identification
- Signature Verification
- Latest 3 Months Payslips
- Latest P60
- Business Bank Statement
- Personal Bank Statement
- Last 2 Years Tax Computations
- Last 2 Years Tax Overviews
- Last 2 Years Accounts
- Accountants Reference
- Gifted Deposit Declaration
- Right To Buy Document
- Help To Buy Authority To Proceed
- Shared Ownership Memorandum Of Sale
- Independent Legal & Financial Advice Declaration
- Other


The choose a file that you have saved to your device and type a description for the file in the **File Description**. Then click **Upload** in the bottom right-hand corner of the screen.

File to upload  Self Build DIP V9 - 1119.pdf

Category  
 Proof Of Personal Identification

File Description  
 Drivers Licence

You then add or remove as many documents as required.

 **Documents**

**Documents Required**

Please upload supporting documentation:

**Jane Jones : Main Applicant**

Category	Document Name	Delete
Proof Of Personal Identification	Drivers Licence	✕ <input type="button" value="View"/>

**John Jones : Applicant 2**

Category	Document Name	Delete
No existing client documents		

## Declarations

The next step requires you to view the Society's Intermediary Privacy Policy and then click **Confirm** when this has been completed.

01 | Applicants   02 | DIP   03 | Application   04 | Complete

Application

- Page 1
- Page 2
- Page 3
- Documents
- Declarations
- Fees
- Your Submission

### Declarations

Please view each declaration and tick to confirm that you have read and agreed to each one.

Declaration	Confirm	View
Intermediary Privacy Policy	<input type="checkbox"/>	<a href="#">View</a>

### Declarations

Please view each declaration and tick to confirm that you have read and agreed to each one.

Declaration	Confirm	View
Intermediary Privacy Policy	<input checked="" type="checkbox"/>	<a href="#">View</a>

## Fees

If you have recommended adding any fees to the loan you can select which fees are to be added in the **Fees that can be added to the loan amount** screen.

Please Note: the **Fees to pay now** section is not applicable to Chorley Building Society as we do not collect fees via this portal.

Application

- Page 1
- Page 2
- Page 3
- Documents
- Declarations
- Fees
- Your Submission

### Fees

**Fees that can be added to the loan amount**

Fee Name	Fee Amount	Select	Remove
Scheme Fee	£999.00	<input type="checkbox"/>	<a href="#">×</a>
Funds Transfer Fee	£25.00	<input type="checkbox"/>	<a href="#">×</a>

Fees you have added to the loan: £0.00 [Add Fees to Loan](#)

**Fees to pay now**

Fee Name	Fee Amount	Select
Scheme Fee	£999.00	<input type="checkbox"/>
Funds Transfer Fee	£25.00	<input type="checkbox"/>

Fees that you have paid: £0.00

Fees that are paid on application, can not be completed on this current interface

[← Declarations](#) [Submit →](#)



## Fees

### Fees that can be added to the loan amount

Fee Name	Fee Amount	Select	Remove
Scheme Fee	£999.00	✓	✕
Funds Transfer Fee	£25.00	✓	✕

Fees you have added to the loan: £1,024.00

### Fees to pay now

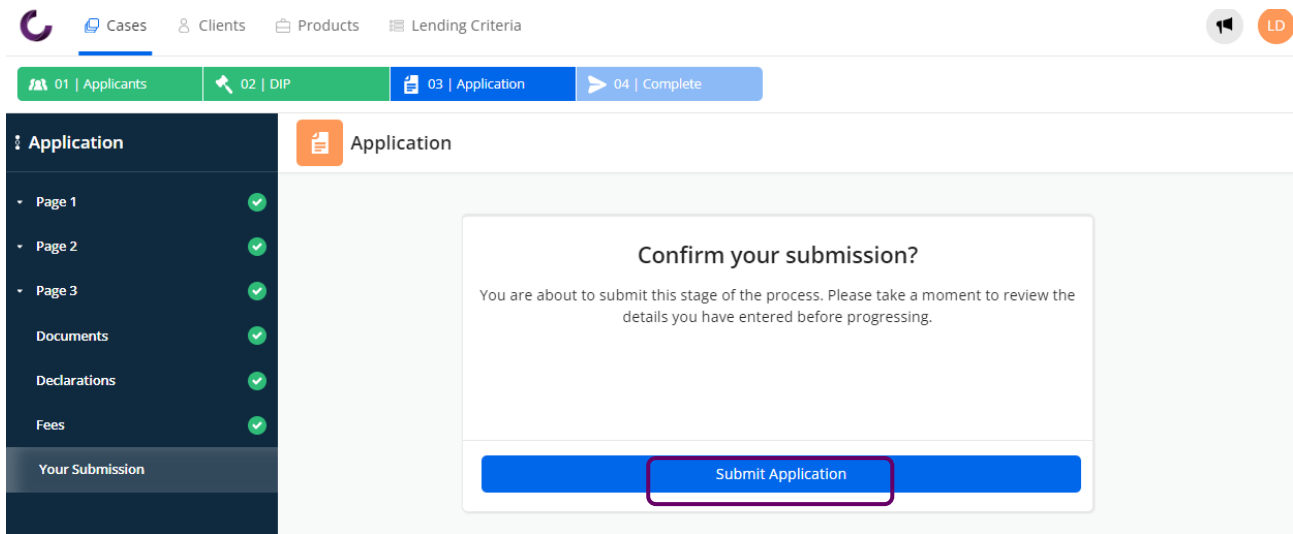
Fee Name	Fee Amount	Select
No fees to pay now		

Fees that you have paid: £0

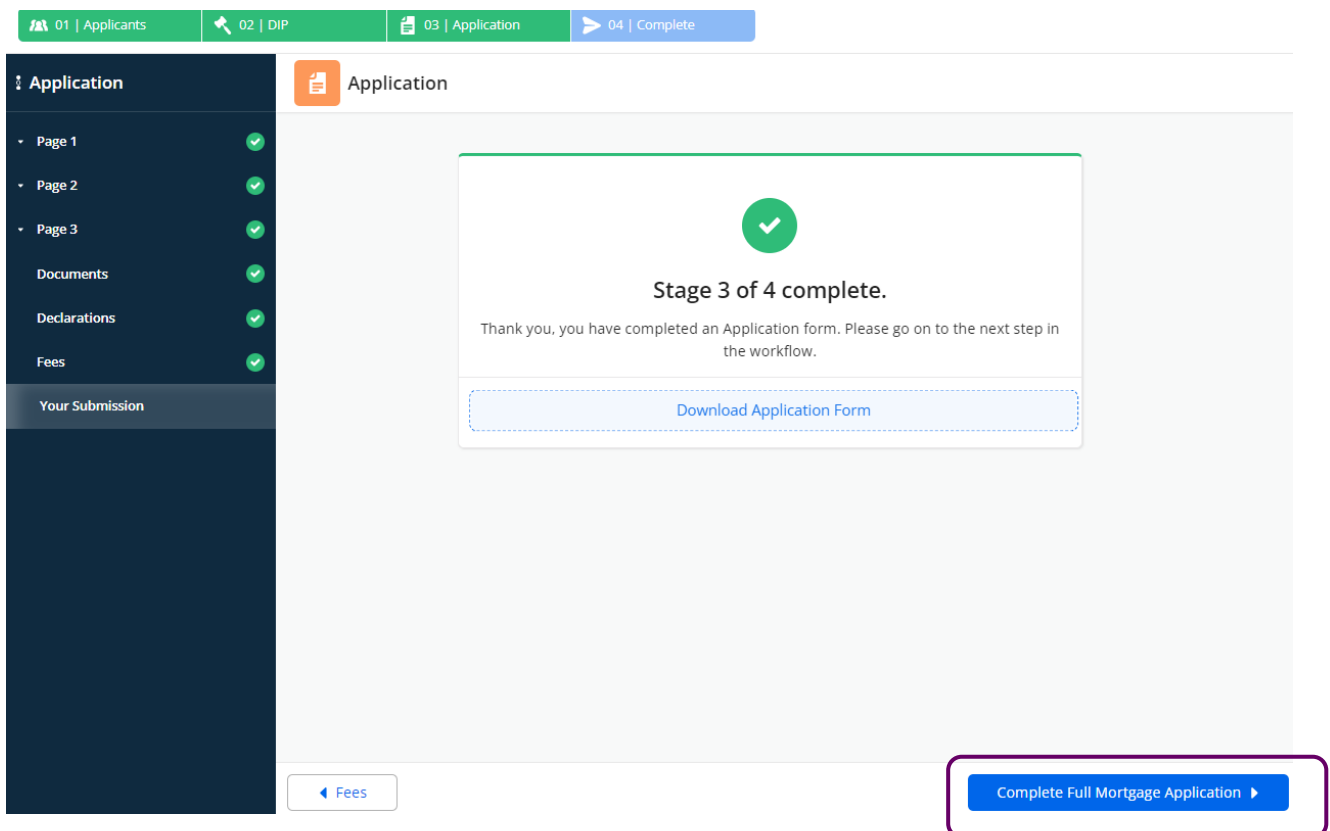
Fees that are paid on application, can not be completed on this current interface

# Submit Application

The next step is to submit the mortgage application by clicking on **Submit Application**

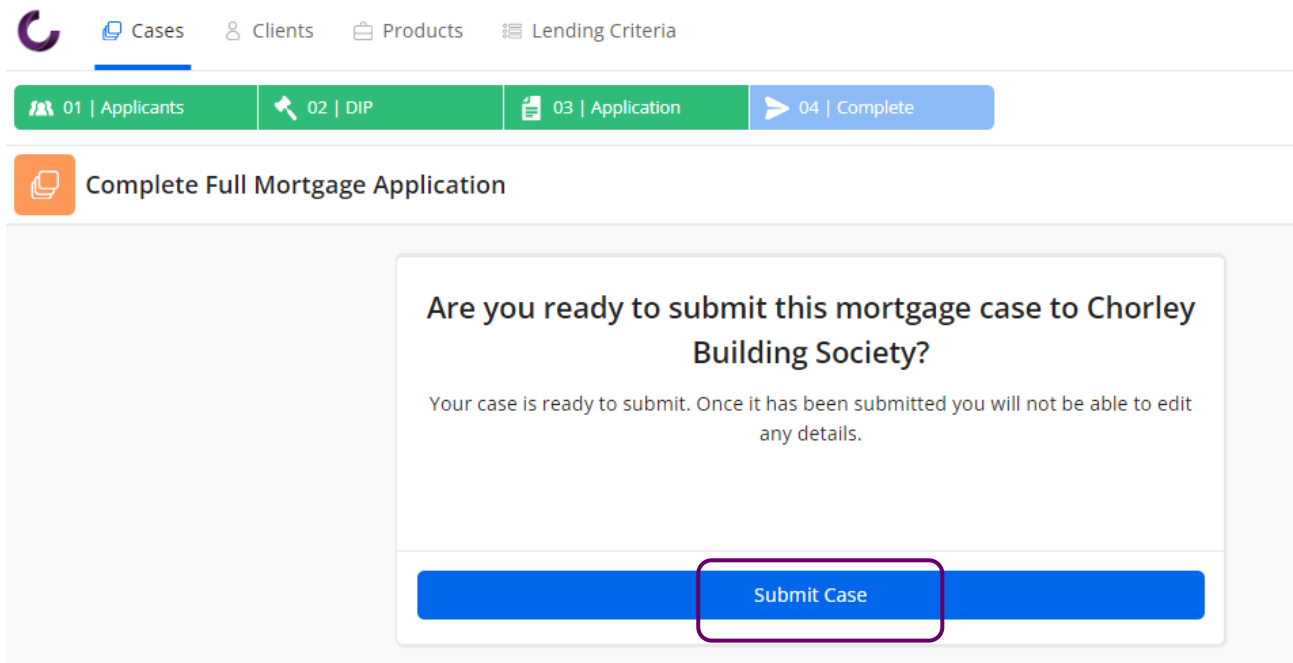


You will then get confirmation that the application has reached **Stage 3** which means that the application is ready to be submitted to the Society for approval. You should review your application form details and then click **Complete Full Mortgage Application**

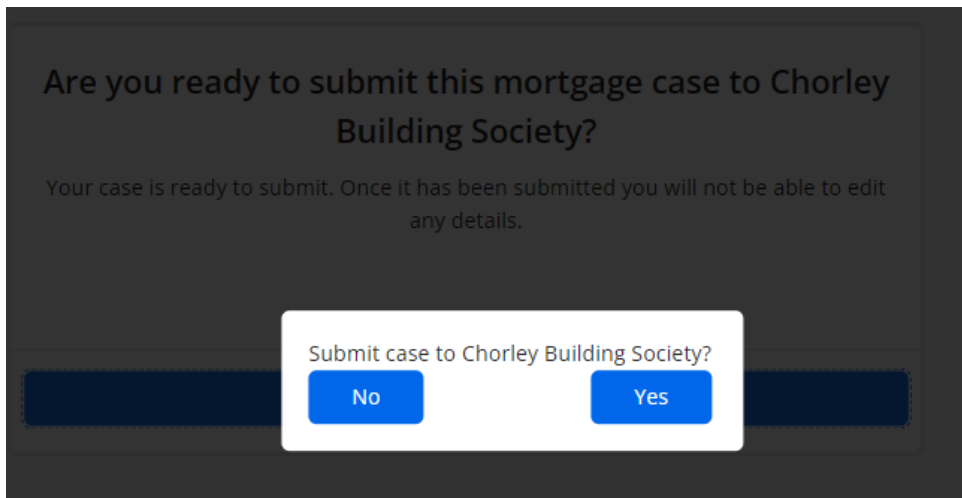




The following message will then be presented and you should click **Submit Case**



Then confirm by selecting **Yes** if you wish to proceed or **No** if you wish to return to the form.



# Case Information

Once submitted, the Application will show as will show as **Completed** for the case.

**Case 6997 Submitted**  
Jane Jones

**Applicants**

**Main Applicant**  
Jane Jones  
defjones@gmail.com  
01515261400  
Drivers Licence [Download]  
+ Add document  
Edit Client

**Applicant**  
John Jones  
abcjones@gmail.com  
01515261400  
No Documents  
+ Add document  
Edit Client

**Case Tracking**

Cancel Case | Continue Mortgage Case

Application	Application	Offer	Completion
Form	Status	Submission Date	Download
DIP	Pass	12/08/2024	[Download]
Application	Completed	12/08/2024	[Download]

**Notes**  
Type note... [Submit]

**Loan Details**

**Details**

Organisation:	THE ONLINE PARTNERSHIP (Network)
Address:	
Purchase Price:	£ 250,000.00
Loan Amount:	£ 150,000.00
Mortgage Term:	25
Product Code:	2 Year Discount 60% LTV - IP241
Purpose of Loan:	HOUSE PURCHASE-OWNER OCCUPIED
LTV:	60.0 %

Once assessed the status will be updated and you will also receive an email notification to confirm this.

**Case 6997 Submitted**  
Jane Jones

**Applicants**

**Main Applicant**  
Jane Jones  
defjones@gmail.com  
01515261400  
Drivers Licence [Download]  
+ Add document  
Edit Client

**Applicant**  
John Jones  
abcjones@gmail.com  
01515261400  
No Documents  
+ Add document  
Edit Client

**Case Tracking**

Cancel Case | Continue Mortgage Case

Application	Application	Offer	Completion
Form	Status	Submission Date	Download
DIP	Pass	12/08/2024	[Download]
Application	Pass	12/08/2024	[Download]

**Notes**  
Type note... [Submit]