

Loans Origination 3.4 - Cases

Cases are at the core of the Mutual Vision Loans Origination system. This is how each piece of work you do, such as a customer DIP or an application, is stored and submitted. When data is input into the system it is stored as a case. Each case has its own unique case ID number attached to it. This guide will cover starting a new case, the various stages of a case, uploading documents and notes and how to cancel cases.

Starting a new case

To start a new case, please press the 'start new case' button. This will then ask you to choose the correct loan purpose, dependent on if the mortgage is a remortgage or house purchase, for example. You will then be able to add clients to the case. You can create a new client in this screen, or you can add an existing client, using the '+' button on the right-hand side of the screen. If you have a number of existing clients, you can use the search box to find the client you would like to add to the case.

Case Navigation

As mentioned in the 'Getting Started' user guide, you will now see 'stages' along the top of the screen, a navigation pane to the left of the screen, and blue navigation buttons at the bottom of the screen. These can all be used to navigate through the form as required. Each stage will go green once complete, and each section on the navigation pane will have a green tick next to it once complete. A blue stage indicates the stage you are currently on, whilst light blue/greyed stages are future stages that can be accessed once the current stage is complete. You must then navigate through the system, filling in all required details. The first stage will be the DIP stage, with the Application Form stage following if the DIP is successful. If a DIP returns a 'refer' or 'declined' result,

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we would like you to call our Head Office to discuss this in more detail. Once submitted, you will see an option to print or download the DIP and Application Form for your own records. If you choose to leave the case halfway through for any reason, the case will automatically be saved, and you can pick up from where you left off at any time by logging back in to the portal, and clicking 'continue' on the Cases screen.

Document and Notes Upload

There are two ways to add a document in Loans Origination. This can be done by clicking 'Cases', then clicking 'View' next to the relevant case. On the left-hand side, you will see an option to add a document to the case. You will need to choose a 'category' and give the file a 'description' before you can upload.

You can also upload a document in the Clients screen, more information on this can be found in our Clients user guide.

It is very similar to add a note, simply click 'View' next to the relevant case, and an option to type a note can be found on the right hand side of the screen. Underwriters will receive a notification when a note is added to ensure no additional information is missed.

Sorting Cases

On the Cases screen, the headings at the top can be used to sort the cases. Cases can be sorted by Application Stage, Loan to Value, Date of Last Action etc.

Cancelling Cases

To cancel a case, you can click 'View' next to the relevant case, and then 'cancel case' will appear near the top of the screen. This will tell the Society that this case is no longer proceeding and it will be cancelled on the system. All data will be saved on the portal so that the case can be resurrected in the future if required.

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