



ROME Enhancement – Proof of Account & Proof of Savings Placeholders

We continually collate your valuable feedback and as a direct result of this feedback, we have made some further enhancements to ROME.

****Please ensure to perform a refresh of your browser before logging into ROME for the new enhancements to take effect – this can be done by holding the Ctrl key and pressing F5, when in your browser****

ROME Enhancement

Update to ‘Proof of Account’ and ‘Proof of Savings’ placeholders

In this latest enhancement, we have updated the ‘Proof of Account’ & ‘Proof of Savings’ placeholders to generate automatically for each bank/savings account that you have keyed in the ROME application.

For example: if you have input that your customer has 3 current accounts and 2 savings accounts, 3 ‘Proof of Account’ and 2 ‘Proof of Savings’ placeholders will auto create.

The description/header of the placeholder will also state which account the placeholder relates to.

This enhancement will make it easier for you to upload the relevant statements to the relevant placeholder for each account.

Please see example screenshots below to show how this will look in ROME:

Proof of current account Bank of Scotland 22222222	Customer Name	Published	▼
Proof of current account Credit Unions 33333333	Customer Name	Published	▼
Proof of savings AIB Bank 55555555	Customer Name	Published	▼
Proof of savings Ford Finance 66666666	Customer Name	Published	▼
Proof of current account AIB Bank 11111111	Customer Name	Published	▲

Follow the steps to request copies of your customer's bank account statements.

1. Ask your customer to sign into their account and download their **last 6 months** of current account statements.
2. Advise customer to make sure the following are clearly visible:
 - o name and address
 - o full account number
 - o sort code
 - o IBAN
3. Ask your customer to email the statements to you or upload the documents themselves.

Please note: screenshots of internet or mobile banking transactions will not be accepted.

Document type



ROME Enhancement – Proof of Account & Proof of Savings Placeholders

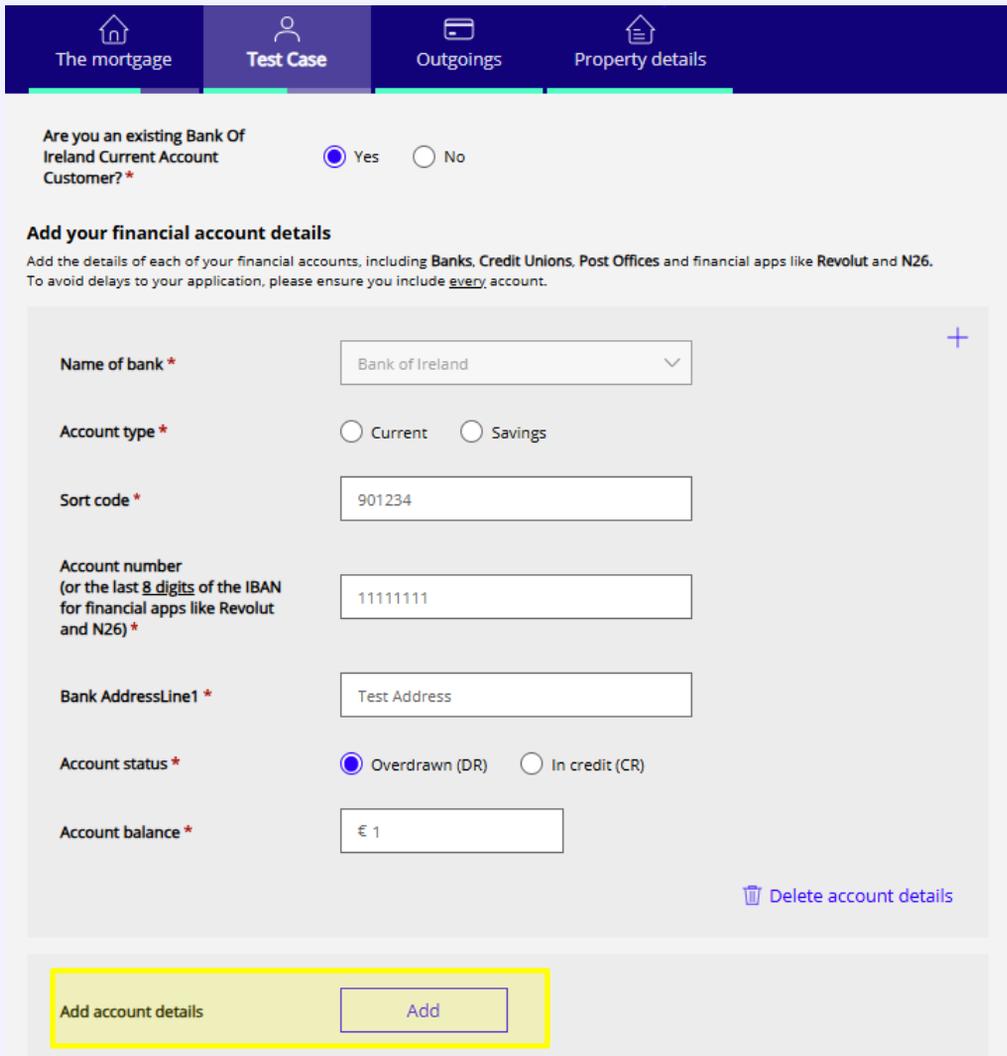
ROME Enhancement continued...



In order to correctly generate these placeholders, you must 'Add account details' for each Current & Savings account for each applicant.

See screenshot below for guidance on how this will look in ROME application.

1. Start by inputting first account details, completing all fields under 'Add your Financial account details'.
2. Proceed to input the next account details by clicking on 'Add' button beside 'Add account details' at the bottom of the page (see highlighted button in screenshot below). Complete all fields for the next account.
3. Repeat these steps for each account. A placeholder will then generate for each account.



The screenshot shows a navigation bar with four tabs: 'The mortgage', 'Test Case', 'Outgoings', and 'Property details'. The 'Test Case' tab is active. Below the navigation bar, there is a question: 'Are you an existing Bank Of Ireland Current Account Customer?' with radio buttons for 'Yes' (selected) and 'No'. Below this is the section 'Add your financial account details' with a sub-header: 'Add the details of each of your financial accounts, including Banks, Credit Unions, Post Offices and financial apps like Revolut and N26. To avoid delays to your application, please ensure you include every account.' The form contains the following fields: 'Name of bank *' (dropdown menu with 'Bank of Ireland' selected), 'Account type *' (radio buttons for 'Current' and 'Savings'), 'Sort code *' (text input with '901234'), 'Account number (or the last 8 digits of the IBAN for financial apps like Revolut and N26) *' (text input with '11111111'), 'Bank AddressLine1 *' (text input with 'Test Address'), 'Account status *' (radio buttons for 'Overdrawn (DR)' (selected) and 'In credit (CR)'), and 'Account balance *' (text input with '€ 1'). A '+ ' icon is in the top right corner of the form area. At the bottom right of the form is a 'Delete account details' link. At the bottom of the page, there is a yellow highlighted box containing the text 'Add account details' and an 'Add' button.