# **Broker News**

28th November 2023





Service Level turnaround times, Christmas cut-off dates, ROME enhancements & Photo Identification requirements





As we approach the busy end of year period, please note the following important dates and turnaround times to help you to manage your customer pipelines.

### Service Level turnaround times

On ROME, we advise by Case Message of expected turnaround times at each stage of your customer's application. This serves to keep you informed at all stages of when to expect an update on the case.

We ask that you check Case Message updates for expected turnaround times, which should reduce the need for calls made to our Broker Specialist team where cases are still within SLA.

## Pre-Christmas Drawdown dates

Deadline date for final docs for pre-Christmas Drawdown: 15th December

Deadline date for payment of Cashback pre-Christmas: 15th December

Final date for drawdown funds to issue Pre-Christmas: 20th December

#### Important to note:

We recommend that all documents that are required for the completion of cases are sent a minimum of 5 working days prior to the above-mentioned dates and are to the satisfaction of the bank. This will avoid delays which may impact completing loans prior to the 15th December (Christmas cut off) . We would also recommend engaging with solicitors to ensure consistency with above.

28th November 2023





## **ROME Enhancements**

### **ROME Enhancements**

Enhancement to 'copy case' functionality now giving the option to copy across all placeholders and documents within them.

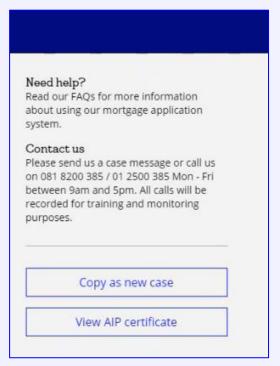
You now have the ability to copy a case, plus all placeholders and documents, to a new case creating a new Case ID number.

#### To do this:

- 1. click 'Copy as new Case' button in your 'Case Overview' screen.
- 2. After clicking this button, a new window will appear. Select 'Yes' under 'Copy case placeholders and documents?' if you wish to bring these across to the new case.
- 3. You also now have the ability to change the 'case segmentation', E.g. where a case should have been submitted as a switcher instead of a purchase. See screenshot below, select 'Yes' under 'Change case segmentation' and select relevant option.

**Note:** Rejected documents will not carry across to new copied case.

**1**.



2.

Are you	ı sure you want	to copy as a ne	w case? X
	previously submitte and a new credit foo	d an AIP for this case, tprint will be made.	a new case ID will
Copy case	placeholders and do	cuments? *	
Yes	○ No		
	deleted. For cases older	olders may be copied over than 3 months, copying p	
Change ca	se segmentation? *		
Yes	○ No		
Is this a sw	vitcher or purchase?		
Switc	her Purchas	e	
	_		

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# **Identification document requirements**

## Proof of photo identification

### Guide for satisfying photo identification requirement

We have reviewed our ID requirements & procedures. Perfected ID is required to be able to submit your application to Credit underwriting for assessment & to meet all regulatory requirements.

This will also ensure that incorrect documents do not cause any further delay later in the process e.g. pre-Letter of Offer or pre-Drawdown.

We require the following as acceptable form of ID.



Please ensure to provide the identification page of the Passport or Drivers Licence so that it looks similar to the image shown.

Please ensure that the image:

- ✓ Shows a slight border around the document as per example shown to ensure that all 4 corners of the document are fully visible.
- ✓ Shows face and all details clearly.
- ✓ Should be fully legible and no information or corners should be covered (including Document number).
- ✓ Has the same NAME as it appears on application.
- ✓ Is a current document (not out of date)