

# Rate Switch Keying Guide



## For intermediary use only

This guide will assist you with keying a Rate Switch in NFI Online.

**Note:** The following application types can't be completed on NFI Online and should follow the paper exception process:

- Where there are more than two clients on the existing mortgage.
- Where your client is switching more than four accounts.
- Where your client is serving in the armed forces with a British Forces Post Office (BFPO) address and their property is currently let.

**NFI Online**  
Secure log on: Hannah Internline

**Your Details**  
This is the information held on our database for you...  
Intermediary ID: 39123  
Warner Holt Financial Services  
FSA: 400020  
Tel: 07111 111111  
Mob: 07111 111111  
Fax:  
Email: msotestuser1@nbsdev.co...  
666 XYZ  
test  
test  
test  
sn38 1nw  
This data will be used on any Illustrations or Offers produced.  
If any of this needs amending, please click on  
[Manage my details](#)

**Create Case**

**Submission Channel**  
Choose channel for submission: BOS Mortgage Group

**Intermediary Contact Details**  
Contact number specifically for this case: 07111111111

**Application Type**  
If you wish to create a Porting application, select New Purchase.  
Application Type: Rate Switch

**How Nationwide Uses Information**  
Please confirm:  
• You have provided a copy of 'How Nationwide uses your information' to the applicant(s) and they have understood how their information will be used  
• The applicant(s) understand that you will need to access information about their existing Nationwide mortgage. This will include their name, address, contact and existing mortgage details  
☒

Version: 8.0.0.0.1  
[Cancel](#) [Backward](#) [Continue](#)

After logging in to NFI Online, click **'Create new case'**.

- 1 After completing the first few questions, select 'Rate Switch' from the Application Type drop-down menu.

Click **'Continue'** to proceed.

**Nationwide NFI Online**  
Secure log on: Hannah Intersine  
Building Society

My Home Case Home Case Update Save and Exit Log out

**Your Details**  
This is the information held on our database for you.  
Intermediary ID: 39133  
Warner Holt Financial Services  
FSA: 400620  
Tel: 07111 111111  
Mob: 07111 111111  
Fax:  
Email: mactestuser1@nbsdev.co...  
666 XYZ  
test  
test  
test  
en38 1mw  
This data will be used on any illustrations or offers produced.  
If any of this needs amending, please click on:  
[Manage my details](#)

**Create Case**  
1 You have indicated that your applicant has an existing open Nationwide mortgage, please search for their mortgage account using the details below. If this is for a joint application you will only need to search for one applicant, details of the second applicant on the mortgage account will be retrieved automatically. All search criteria must be completed.  
2 Your applicant should contact Nationwide directly on 0800 121 74 66 if they wish to change their existing term or repayment basis, or if they would like to complete additional borrowing.

**Applicant Details**  
1 Surname   
Forename   
Date of birth  /  /   
Security Address Postcode   
Mortgage Account Number   
2 [Continue](#)

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1 On the 'Create Case' page, you'll be required to complete all the 'Applicant Details' fields. You should use the account numbers linked to the property being transacted on.

2 Click 'Continue' to proceed.

**Nationwide NFI Online**  
Secure log on: Hannah Intersine  
Building Society

Application ID: Mrs J Ryan & Mr R Ryan Case ID: M595579492 My Home Case Home Case Update Save and Exit Log out

**Rate Switch**  
Product Filters  
Product Selection  
Intermediary Advice & Fees  
Fee Payment Options  
Product Start Date  
Final Steps

**Account Selection**  
1 Select each account your applicant would like to switch to a new product. You can select a maximum of four accounts per application. If you would like to switch more than four accounts you will need to complete and return our manual Rate Switch Application Form, which can be found [here](#).  
2 If your applicant is switching more than one account, the total product fee payable (if applicable) will not be more than a single product fee (e.g. if there are two accounts with product fees of £999 this will be split with £499.50 showing against account one and £499.50 showing against account two.)

Account Number	Existing Balance	Existing Product	Expiry Date	Current Monthly Payment	New Product	New Monthly Payment
61345903068	£19,236.59	Base Mortgage Rate	30/11/2046	£79.53		

New Product   
New Monthly Payment   
Account Number  61345903068  
1 [Choose Product](#)

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This screen will display all accounts eligible for a rate switch and will ask you to choose a product to switch to.

1 Click 'Choose Product' to switch the account to a new product.

**Remember:** You can switch up to 4 accounts per rate switch application online

**Nationwide NFI Online**  
Building Society  
Secure log on: Hannah Intermine  
Applicant(s): Miss K Water Case ID: M650371303

My Home Case Home Case Update

Illustration  
DIP  
Reserve Product  
FMA  
Rate Switch  
Rate Switch Loan Selection  
Product Filters  
Product Selection  
Intermediary Advice & Fees  
Fee Payment Options  
Product Start Date  
Final Steps

### Product Selection

Can't find the product you're looking for? [Click here](#)

#### Mortgage Account To Be Switched

Account Number	Outstanding Balance	Term (years)	Term (months)	Current Monthly Payment
60613559040	£43,843.60	7	6	£151.33

1 The below products have been filtered as per your selection on the Product Filters screen, select a product to continue. If you'd like to view different products, please revisit the Product Filters screen.

2 Select two products to compare their features.

#### Eligible Products List

Product Code	Product Description	APRC	Initial Interest Rate	Booking Fee	Product Fee	Monthly Payment	
541774	5 Year Base Rate Tracker	3.3%	2.24%	£0.00	£999.00	£81.84	<input type="checkbox"/>
541968	5 Year Fixed Rate	2.9%	2.19%	£0.00	£0.00	£80.01	<input type="checkbox"/>
541891	3 Year Fixed Rate	3.4%	2.14%	£0.00	£0.00	£78.19	<input type="checkbox"/>
541814	2 Year Fixed Rate	3.7%	1.99%	£0.00	£0.00	£72.71	<input checked="" type="checkbox"/>
541622	5 Year Fixed Rate	3.1%	1.99%	£0.00	£999.00	£72.71	<input type="checkbox"/>
542028	2 Year Base Rate Tracker	3.6%	1.94%	£0.00	£0.00	£70.88	<input type="checkbox"/>
541557	3 Year Fixed Rate	3.6%	1.84%	£0.00	£999.00	£67.23	<input type="checkbox"/>
541492	2 Year Fixed Rate	3.9%	1.59%	£0.00	£999.00	£58.09	<input type="checkbox"/>
541733	2 Year Base Rate Tracker	3.9%	1.54%	£0.00	£999.00	£56.27	<input type="checkbox"/>

1 [Start Again](#)

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- 1 If you would like to amend your chosen product filters, you can click '**Start Again**' to return to the '**Account Selection**' page which will clear any selection that has been made on the chosen account.
- 2 Alternatively, select a product from the list and continue to next page where you will select the Product Start Date.

**Nationwide NFI Online**  
Building Society  
Secure log on: Austin Ebodili  
Applicant(s): Mrs L Brownmsk & Mrs C Cobb... Case ID: M671405241

My Home Case Home Case Update Save and Exit Log out

Illustration  
DIP  
Reserve Product  
FMA  
Rate Switch  
Rate Switch Offer  
Final Steps  
Rate Switch Offer

### Rate Switch Offer

You can view and print the Rate Switch offer below. Once the application has been submitted, a copy of the offer will be posted to the applicant(s).

1 [View Offer](#)

#### Confirm Consent

Please confirm that all applicants have seen the Rate Switch offer and consent to this application.

2 ☒ Yes ☐ No

3 [Submit](#)

3 Select 'Submit' to submit this Rate Switch application.

Amend Case

Version: 8.0.0.0.1 Your progress [Submit](#) Page ID: F259962

- 1 Once you've chosen your Product Start Date the '**Rate Switch Offer**' page will prompt you to '**View Offer**'. This will allow you to view and print the offer instantly.
- 2 You'll need to confirm that the applicants have seen the mortgage offer and consent to the rate switch.
- 3 Click '**Submit**' to submit your application.

**Remember:** The product will only be reserved and the application fully submitted once you select '**Submit**'.