

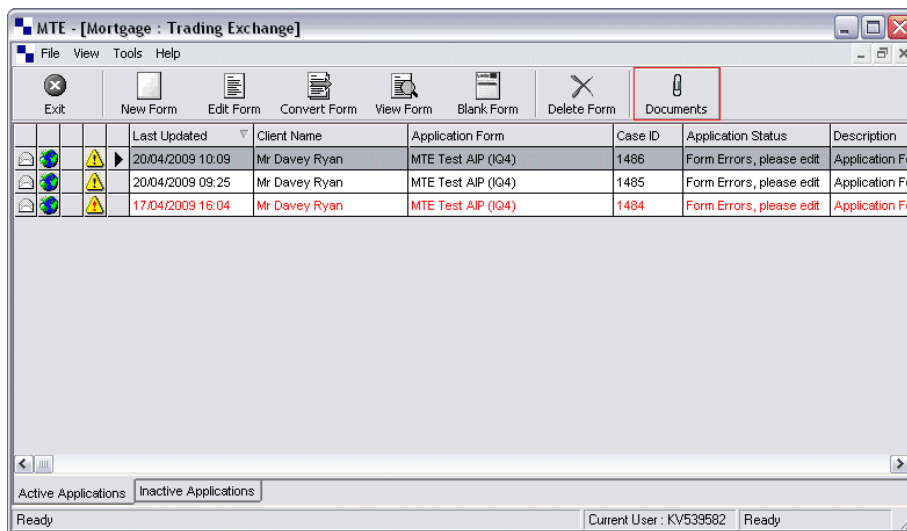
Document management (currently Nationwide only)

This section describes the process of attaching documents to a Nationwide application via MTE. The functions described in this section are enabled when the lender has passed back document requirements for the case following a successful send/track cycle.

If a form has outstanding document requirements the intermediary is made aware of this by the presence of the 'Documents' button on the MTE grid. This button is not displayed if the form has a status of 3100 (Application Complete) as this status prevents the submission and tracking of the form.

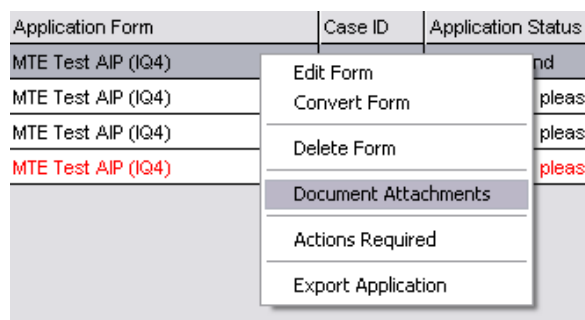
The required documents can be attached to the case from three distinct locations within MTE (if the form status is 3100 the ability to attach documents will be suppressed in each location).

From the main MTE Grid:



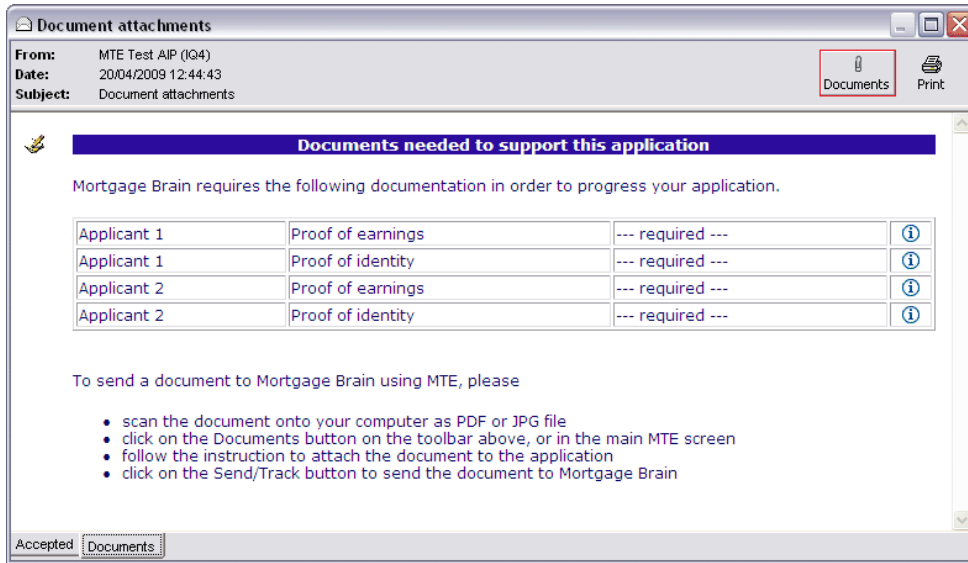
MTE Grid with Documents button highlighted

It is also possible to right-click on the application and select 'Document Attachments' from the context menu:



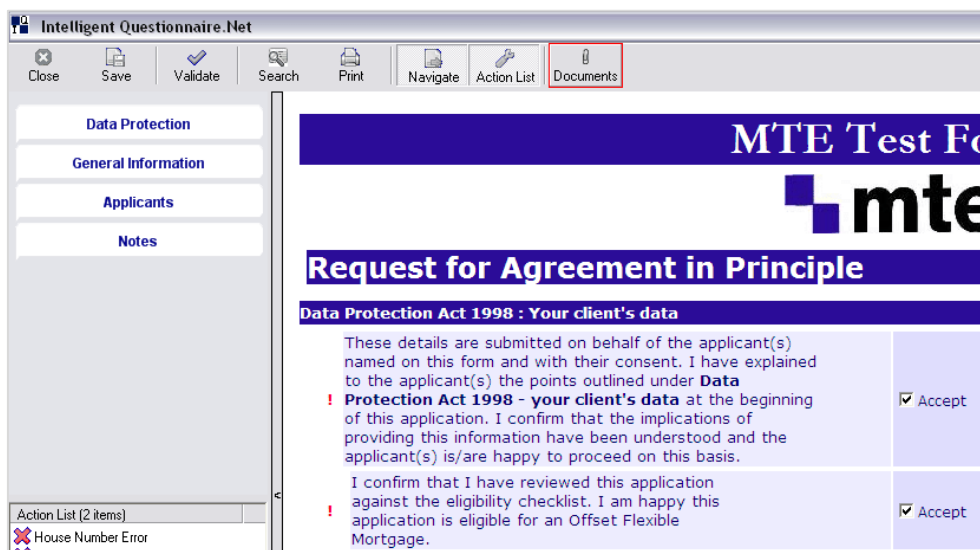
Context menu with 'Document Attachments' selected

From the response message:



Sample response (envelope) message with Documents button highlighted

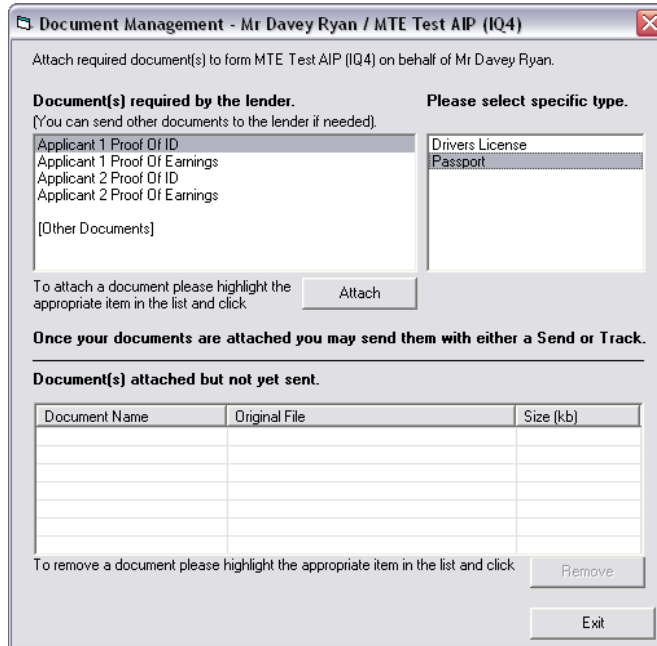
From the MTE form:



MTE Test AIQ (IQ4) with Documents button highlighted

The above location is optional and can be removed at the lender's request. See the section 'Suppressing attachment icon in MTE form' for details of how this is accomplished.

Selecting the Documents icon in any of the above location brings up the Document Management dialog:

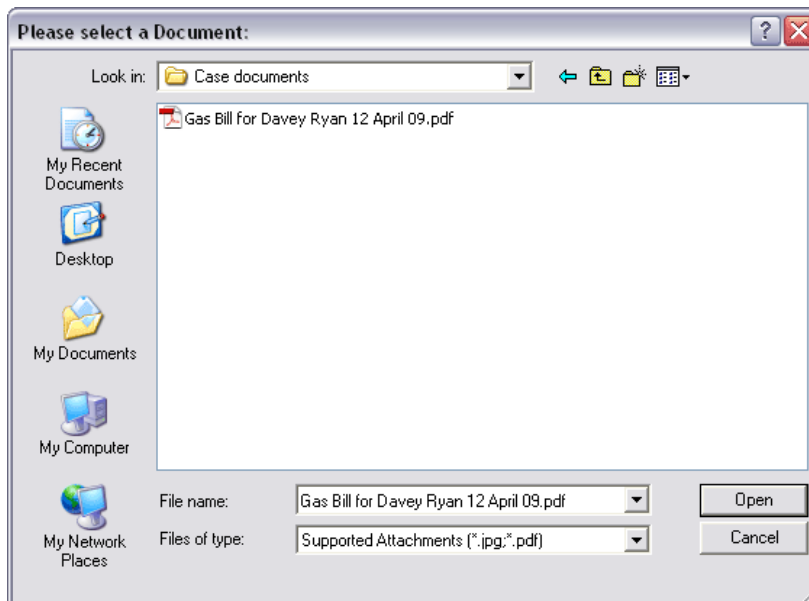


Main Document Management dialog

From this dialog documents can be attached and removed prior to sending to the lender.

Selecting a file to attach

Pressing the 'Attach' button brings up the following dialog:



Document selection dialog (filtered)

The dialog allows you to browse for the location of the file you wish to attach. The view is filtered depending on the extensions allowed in the documents.xml file.

If you select a file greater in size than the specified maximum allowed the following popup is displayed:



Document size warning message

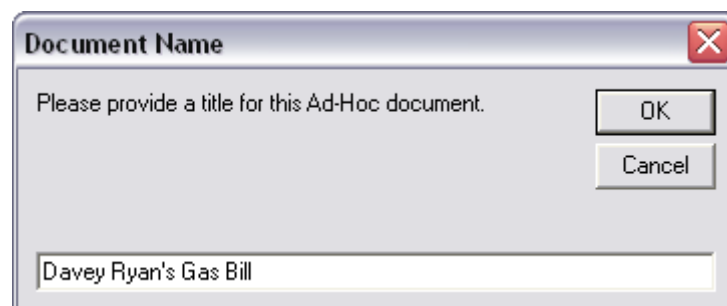
Clicking 'OK' prompts MTE to return to the Document Management dialog, allowing the user to re-select a valid document.

Once a document has been attached it is added to the 'Document(s) attached but not yet sent' list. Documents can be removed from this list by highlighting the document and pressing 'Remove'.

Ad hoc documents

The lender can also allow the intermediary to send unsolicited documents (on an ad hoc basis) along with or instead of specifically requested and named documents such as a driving license. This needs to be enabled in the document requirement response returned by the lender (see section 2.1 for an example ad hoc requirement).

If this option is available to the Broker the [Other Documents] option appears in the 'Document(s) required by the lender' pane. No specific type is required for ad hoc documents. Once [Other Documents] is selected the 'Attach' button becomes active – pressing it will prompt MTE to ask for a document title:



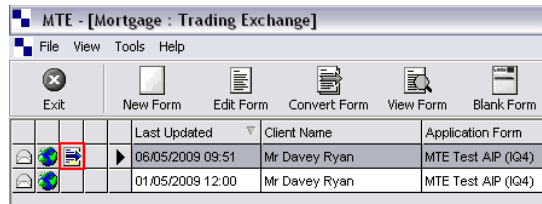
Ad hoc document title dialog

The title can consist of any characters upto a maximum length of 255.

When OK is pressed the behaviour of MTE is identical to that when processing named documents including validation of file type and file size (see 'Selecting a file to attach' section above).

Sending documents

When a form is ready to be submitted the following icon appears next to it on the MTE grid:



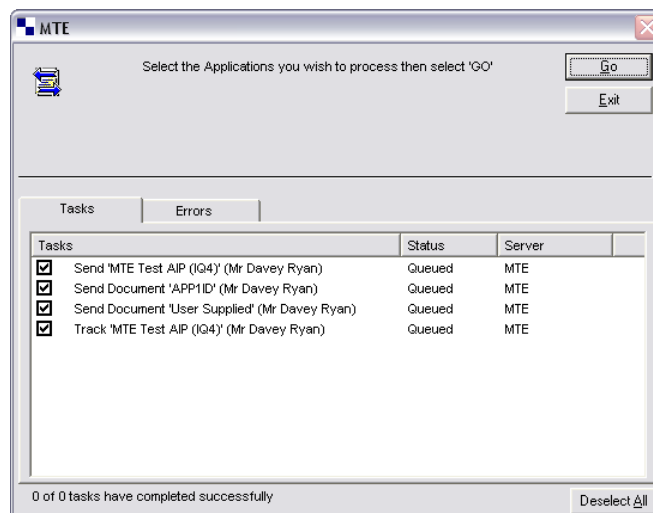
Form with Send icon highlighted

This icon appears if either of the following conditions is met:

1. The form is validated but is yet to be sent (Application Status = "Ready to Send").
2. The form has documents attached but is yet to be sent

The icon does not appear if the form has outstanding errors (Application Status = "Application Form Error") or is not fully completed (Application Status = "Form not validated").

Once documents have been attached to the case they are ready to be sent to the lender. This is done by pressing the Send/Track button on the MTE grid or pressing F5. This displays the following screen:



Example send/track with 1 names document and 1 ad hoc document attached

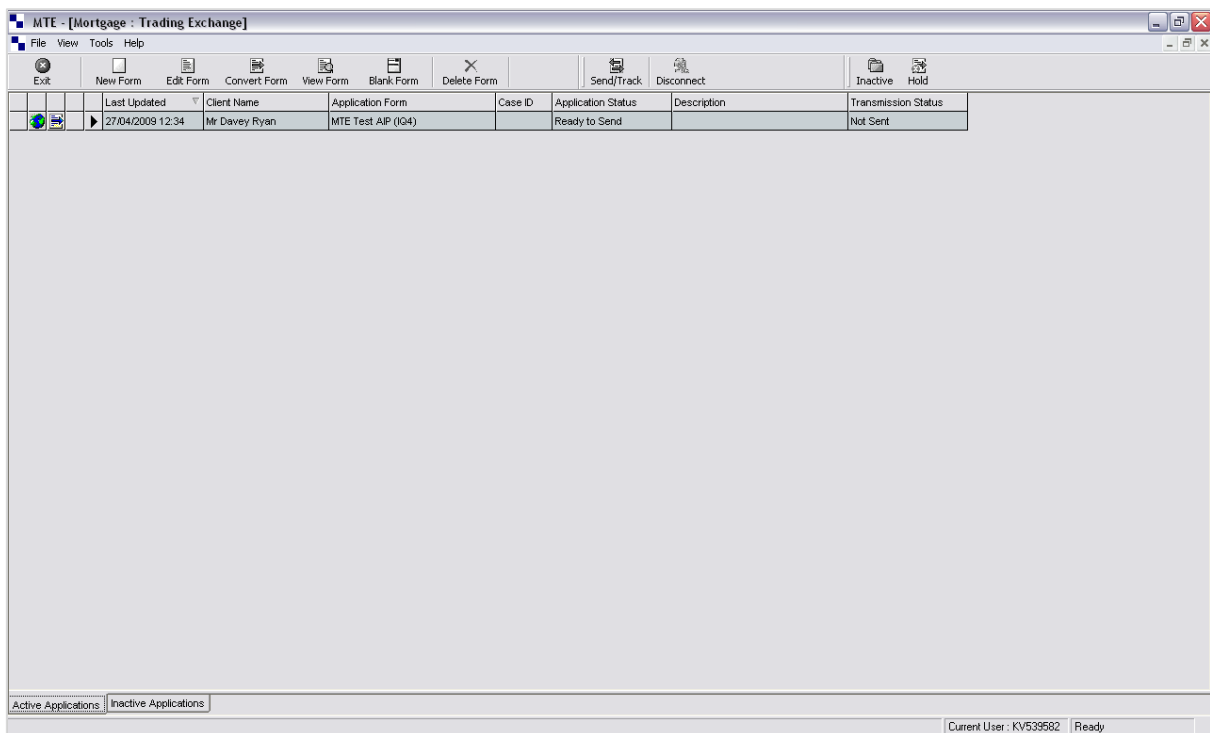
It is possible for documents to be sent to the lender on their own, i.e. without any 'Send...' or 'Track...' actions. In the above example this would be done by pressing the 'Deselect All' button and manually re-selecting the two 'Send Document...' items. This action will always result in the document requirements list being out of date (as the document(s) will have been transmitted but the document requirements list will not have been updated via a subsequent 'track'). MTE client will prevent the submission of specifically named document multiple times (unless the document requirement is ad hoc).

It is recommended to always perform a track when sending documents to a lender as this increases the chances of an updated requirement list being returned. However as lender's systems may need some time to process the documents and return revised requirements the Broker may need subsequent tracks to retrieve updated requirements.

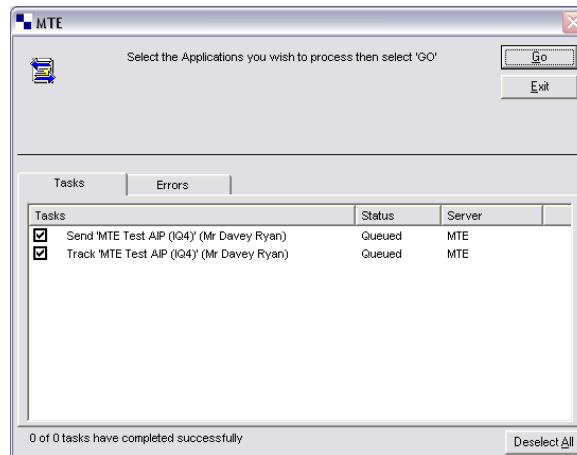
Example scenario

This section follows a typical example MTE submission with document requirements. Response messages shown are examples only. Documents can also be sent when the form is locked for further editing (see 'Sending Documents').

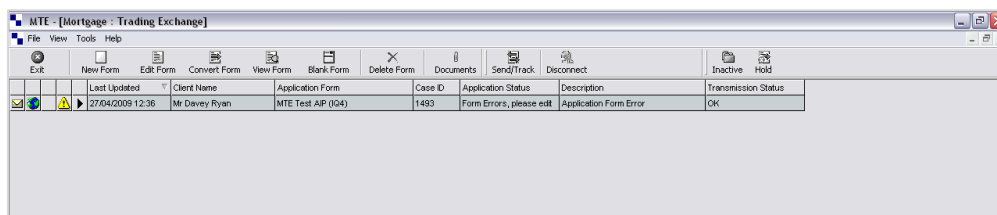
To begin with an MTE form needs to be fully completed, validated and saved. The form appears on the MTE grid and is ready to be sent to the lender:



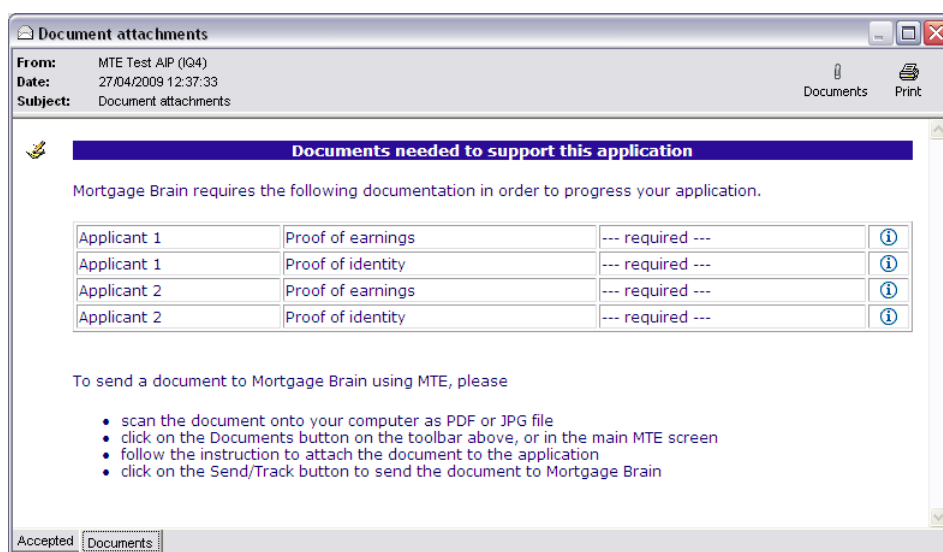
The **'Send/Track' button** is pressed in order to send the form to the lender and track any responses. The user enters their PIN and the following screen is displayed:



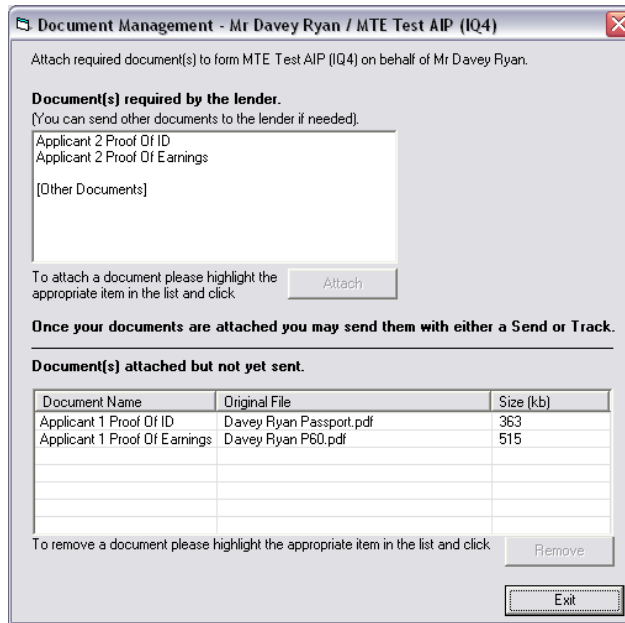
The send/track cycle completes and the user is returned to the MTE grid. The **Action icon** appears, indicating actions are required in order for the case to proceed (this indicates the presence of named documents only and is not triggered when only ad hoc documents are requested). The **documents menu button** has also appeared indicating document requirements are outstanding for this case.



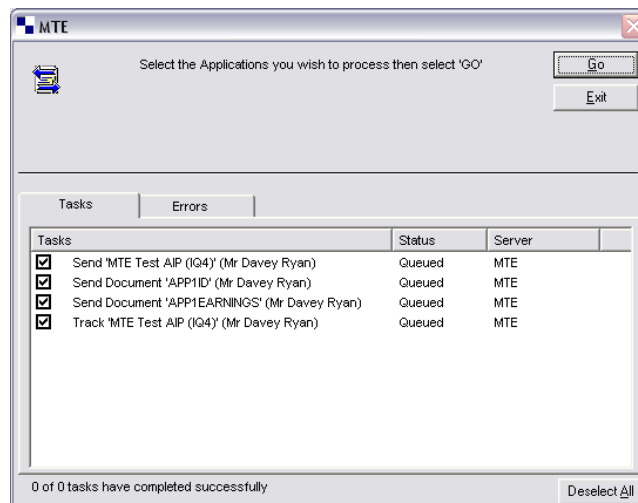
Opening the envelope response message launches a custom page response showing that four documents have been requested by the lender in order for the case to proceed.



Clicking on the Documents icon from any location presents the user with the Document Management dialog. Two of the four required documents are attached initially:



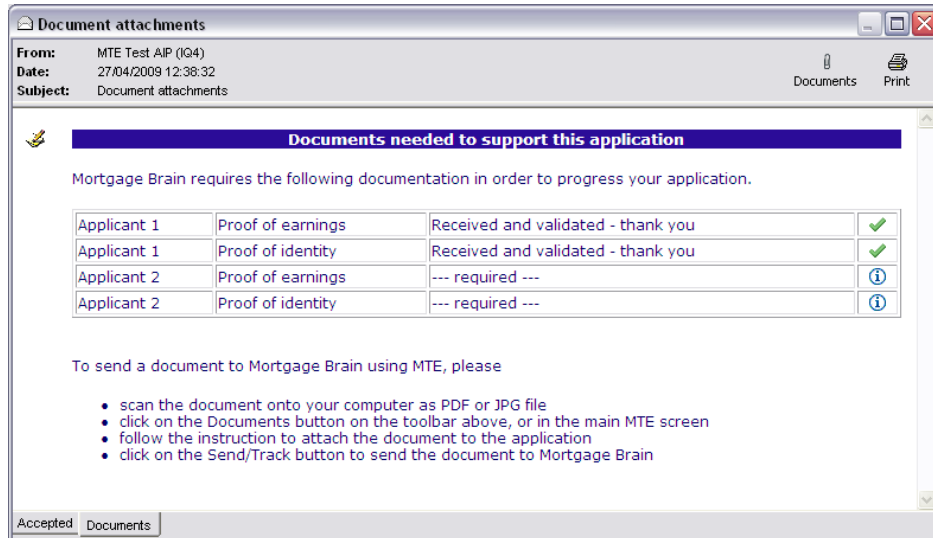
The form is re-edited, validated, saved and closed in order to be ready to be sent again. The **send/track icon** is pressed, the user enters their PIN and the following is displayed.



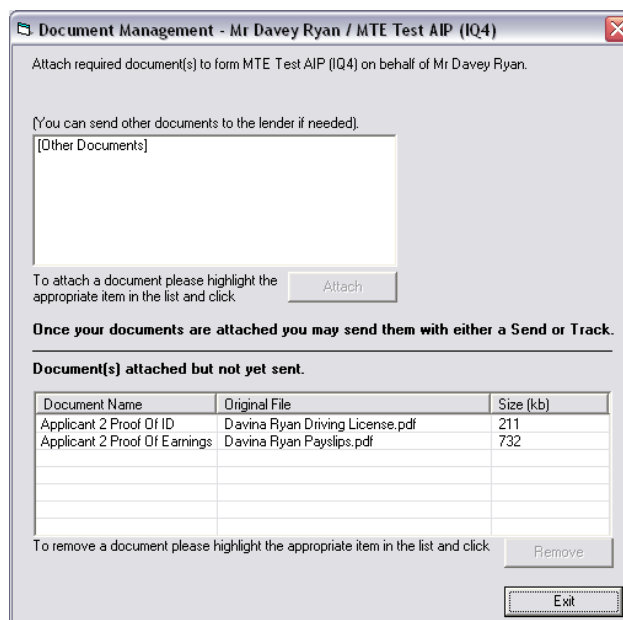
The two documents are sent to the lender and the case is tracked.

In this example the lender automatically acknowledges receipt and validation of the files sent and returns an updated page response and document requirements to show the revised status.

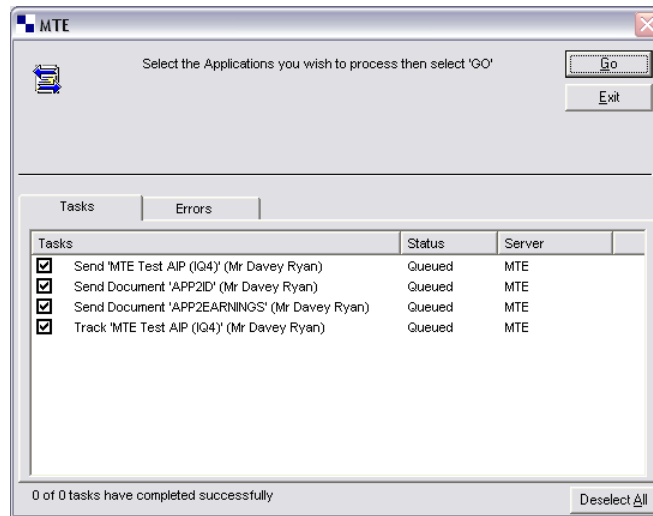
Re-opening the response message shows the documents are now with the lender:



The **Documents icon** is pressed and the Document Management dialog re-appears. The remaining two documents are attached to the case. Notice the first two documents (Applicant 1 Proof Of ID and Applicant 1 Proof Of Earnings) no longer appear in this dialog as they have already been received by the lender.

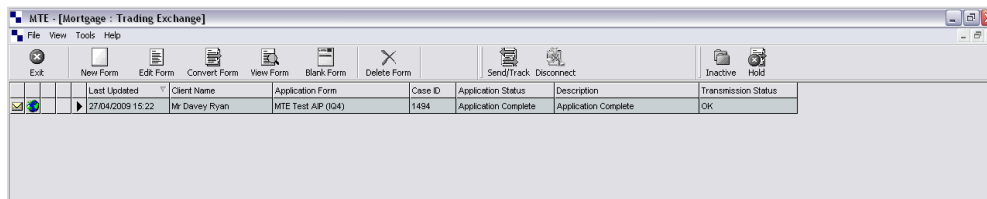


The form is re-edited, validated, saved and closed in order to be ready to be sent again. The **send/track** icon is pressed, the user enters their PIN and the following screen is displayed.



The document transmission cycle is now complete as all four requested documents have been successfully transmitted to the lender. When a form application status is set to "Application Complete" (status code 3100) the Document icon no longer appears on the MTE grid or response message regardless of whether there are outstanding document requirements.

It is the lender's responsibility to ensure all documents have been received and verified before setting the application status to 3100 if they wish to satisfy all document requirements via MTE.



In this example opening the page response message confirms that all the documents have been sent and received by the lender.

