## At the Chalk Face:

My Broker Venue – Application Referral Guide



If the referral is for an Unregulated Bridge application, please contact your Business Development Manager or Support Team on 0161 933 7101. For all other products, please follow the below steps.

- Log into <u>My Broker Venue</u> with your login credentials. If you haven't previously logged in, please Register.
  - Use either the 'Product selector' or 'Quick product links' to produce a quote.
  - Click on 'Applicant Details' and add in the details of the applicant(s)\*.
    - Click on 'Credit Profile' and run a 'Credit search' for the applicant(s).
    - To refer an application, click 'Refer Application'.
- b Complete the referral form.
  - a. Choose the 'Referral reason' and 'Referral details' from the drop-downs.
  - b. Write any supporting information in the commentary box
  - c. Select 'browse' to locate any applicable documents
  - d. Press 'save' and 'upload' to upload the document to the referral form
  - e. Add additional referral reasons if required.
  - f. If the applicant(s) is not a resident of the UK, please add their residential address into the 'Comments' section.

Application referral ×								
Referral reason		Referral details		Comments	Created date	Referral outcome	Underwriter comments	
Select	۷	Select	۲	. Please provide additional information to support your referral	+ Add			
Attach file								
To help our underwriters make an indicative lending decision please ensure you attach any relevant information that may support the customers referral.								
Market: Mit can be und ge except filter for pull, where formation with a maximum filter size of 200403.								
Attachments Uploaded Document(s) Browse								
El Save and Upload								
* Close	-							Submit referrat 🕫

Once the referral form has been completed, click on 'Save and 'Upload' and 'Submit referral'.

\* If the applicant(s) lives abroad (outside of the UK), in the 'Current Address' section, the country of residence can be inputted as 'Non-UK', removing the credit search requirement.

## What happens after you've referred an application?

- Once the referral has been submitted, we will review this.
- Once we've reviewed the referral, you'll receive an email confirming this has been reviewed and a decision has been made.
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Log back into My Broker Venue.

Open the referral form back up and our response will be in the 'Underwriter comments' section on the right hand side.

If you want to respond, or send further information, follow the above referral process again.

For professional intermediary use only

