

Conveyancing Portal.

Activate a policy

Locate the policy you added

The screenshot shows the NHBC Conveyancing dashboard. At the top, there's a dark blue header with the NHBC logo and 'Conveyancing' text. To the right, it says 'My Organisation' and 'portal01@dev-nhbc.co.uk'. Below the header, the main content area is titled 'Home'. Underneath, there's a 'My Cases' section with a '+ Add Case' button. This section contains three cards: '1 New Cases' (highlighted with a red bar and a purple box with a '1' in a circle), '1 Active Cases', and '0 Archived Cases'. Below this, there's an 'Office Cases' section with a purple arrow pointing down to a table.

1. From the main home screen, click 'New Cases'.
2. Locate the policy and click on the red policy number.

Case Ref.	Status	Purchaser(s)	Property Address	Builder	Plot No.	Policy No.	Remove
AZ011441	-	-	-	Taylor Wimpey Bristol A Division of Taylor Wimpey UK Ltd	1	AZ011441	✗
AW129163	-	-	-	J A Pye (Oxford) Ltd	9	AW129163	✗
AW129160	-	-	-	J A Pye (Oxford) Ltd	6	AW129160	✗

Confirm details

Case Ref.

[AT023581](#)

Home My Organisation portal01@dev-nhbc.co.uk

Policy Number: **AT023581** Plot Number: **Ha.90** Site: **Heathside & Lethbridge (Parkside), Phase 5&6 Lewisham Rd, LONDON, SE10 8FL, UK**

Confirm Details

Please review the information below and confirm to continue.

Plot Number:	Ha.90
Site Address:	Heathside & Lethbridge (Parkside) Phase 5&6 Lewisham Rd LONDON SE10 8FL UK
Property Address:	Not yet known
Seller:	Ardmore Construction Ltd
Current Policy Number	AT023581

If there is something wrong, please tell us below.

Something wrong

Cancel Confirm >

1. Confirm you have the correct policy by matching up all of the details to the information you have been given for your client's purchase.
2. If you are happy that everything matches, click 'Confirm' and continue to activate the policy.

Confirm details

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Heathside & Lethbridge (Parkside), Phase 5&6 Lewisham Rd, LONDON, SE10 8FL, UK

Cancel Confirm >

Please review the information below and confirm to continue.

Plot Number:	Ha.90	1
Site Address:	Heathside & Lethbridge (Parkside) Phase 5&6 Lewisham Rd LONDON SE10 8FL UK	2
Property Address:	Not yet known	
Seller:	Ardmore Construction Ltd	3
Current Policy Number	AT023581	

If there is something wrong, please tell us below.

Something wrong

However ...

If any of the details are incorrect:

Select the 'Something wrong' button at the bottom of the screen.

Examples of incorrect information:

1. plot number is incorrect
2. site address is incorrect
3. seller/developer is incorrect.

Confirm details

Home My Organisation portal01@dev-nhbc.co.uk

leathside & Lethbridge (Parkside), Phase 5&6 Lewisham Rd, LONDON, SE10 8FL, UK

Cancel Confirm >

Please review the information below and confirm to continue.

Plot Number: Ha.90

Site Address: Heathside & Lethbridge

Property Address: Phase 5&6

Seller: Ardmore Co

Current Policy Number

If there is something wrong, please tell us

Something wrong

NHBC Conveyancing

Policy Number: **AT023581** Plot Number: **Ha.90** Site: **Heaths**

Something wrong

Please select a reason:

- Remove case
- The listed seller is incorrect
- The plot/site address is incorrect
- Plot number is wrong

After clicking the 'Something wrong' button, this pop-up will appear.

Go ahead and choose the appropriate option.

Depending on the reason you chose, the portal may automatically remove the incorrect policy and replace it with the correct policy.

If this happens, you may need to look back into your 'New Cases' tab to locate it.

Review builder data

My Organisation portal01@dev-nhbc.co.uk

Heathside & Lethbridge (Parkside), Phase 5&6 Lewisham Rd, LONDON, SE10 8FL, UK

Please review the purchasers below which have been updated by the builder.

All purchasers will be added to your case unless you select 'Not my client' for any purchasers which you do not believe to be associated with the property purchase.

Note: Any previously provided occupancy type or purchaser details may get replaced if selections are made which do not conform with existing details. Also, a combination of individual and business purchasers for a case is not permitted.

Newly created or updated purchasers provided by the builder

Purchaser Type	Name	Address	Not my client
Individual	Mr Test Homeowner		<input type="checkbox"/>
Individual	Mrs Test Homeowner	testhomeowner@dil-nhbc.co.uk	<input type="checkbox"/>

Cancel Confirm >

If the details were correct (and you had clicked on 'Confirm' instead of 'Something wrong'), this page will appear:

1. If a builder has provided NHBC with purchaser details, the names will be shown here.
2. If they are **not** your client please tick the 'Not my client' box accordingly, which will remove them in the next step.
3. Click 'Confirm'.

Plot details

Plot Details is the first step to capture the purchase details.

NHBC Conveyancing My Organisation portal01@dev-nhbc.co.uk

Policy Number: AH035112 Plot Number: 16 Site: Heaton Park Church, New Town Street, PRESTWICH, GREATER MANCHESTER, M25 1

Step 1 of 6 - Plot Details

Plot Details

- Exchange of Contracts
- Insolvency Protection
- Completion
- Buildmark Certificate
- Submit

Your Reference
Test 2

Property Address: Address Line 1
Address Line 2
Town
POS2 ODE

Occupancy Type
Owner Occupier

If you update the occupancy type after adding the purchasers details, this could result in those purchasers being removed

Purchaser(s):
Please review and edit your client details such as their correspondence address by clicking the edit icon

Dafly Duck dduck@dl-nhbc.co.uk

+ Add Purchaser

[Click here if this home is being built for your clients by a builder they have contracted](#)

Due Diligence Cancel Save & Exit Save & Continue

1. You can add or remove a purchaser's name here.
2. This should be clicked if your clients have contracted their home to be built on land they owned prior to the new build.
3. Allows you to see the plot details and any downloadable documents.
4. Saves the information you have entered so far and returns to the cases screen.
5. Saves and progresses through the activation.

Due diligence

Due Diligence

NHBC Conveyancing My Organisation portal01@dev-nhbc.co.uk

Policy Number: AH035112 Plot Number: 16 Site: Heaton Park Church, New Town Street, PRESTWICH, GREATER MANCHESTER, M25 1

Due-Diligence < Back

1

Purchasers: Daffy Duck (dduck@dil-nhbc.co.uk)

Property Address: Address Line 1
Address Line 2
Town
PO52 0DE

Exchange Date: 13/10/2023

Completion Date: 30/11/2023

Purchase Price: £350,000

2

Pre-Completion Cover: Cover not available

Post-Completion Cover: Active from date of Completion subject to the Warranty Release Confirmation being issued

NHBC Building Control: Building Control is with a different provider please contact the builder or local authority for more information

Endorsements: No endorsements against this policy

Final Inspection Date: 02/10/2008

3

Name	Download
Buildmark Policy Booklet:	↓
Summary of Cover:	×
Insurance Product Information Document (IPID):	↓
Insolvency Cover Certificate:	×
Warranty Release Confirmation:	×
Buildmark Certificate:	×

1. Populates with the data you have entered for the activation.
2. Shows the NHBC cover and information relevant to the plot.
3. Shows the NHBC documentation relevant to the plot

Due diligence

Due Diligence

NHBC Conveyancing My Organisation portal01@dev-nhbc.co.uk

Policy Number: **AH035112** Plot Number: **16** Site: **Heaton Park Church, New Town Street, PRESTWICH, GREATER MANCHESTER, M25 1**

Due-Diligence [Back](#)

Purchasers:	Daffy Duck (dduck@di1-nhbc.co.uk)
Property Address:	Address Line 1 Address Line 2 Town PO52 0DE
Exchange Date:	13/10/2023
Completion Date:	30/11/2023
Purchase Price:	£350,000

Pre-Completion Cover:	Cover not available
Post-Completion Cover:	Active from date of Completion subject to the Warranty Release Confirmation being issued
NHBC Building Control:	Building Control is with a different provider please contact the builder or local authority for more information
Endorsements:	No endorsements against this policy
Final Inspection Date:	02/10/2008

Name	Download
Buildmark Policy Booklet:	Download
Summary of Cover:	Download
Insurance Product Information Document (IPID):	Download
Insolvency Cover Certificate:	X
Warranty Release Confirmation:	X
Buildmark Certificate:	X

Regardless if the policy is activated, you will also be able to see:

1. if the building control is/will be carried out by NHBC
2. the Summary of Cover document (available prior to activation).

Exchange of contracts

NHBC Conveyancing

Policy Number: **AH035112** Plot Number: **16** Site: **Heaton Park Church, New Town Street, PRESTWICH, GREATER MANCHESTER, M25 1**

Step 2 of 6 - Exchange Due Diligence < Previous Save & Exit Save & Continue >

Plot Details

Exchange of Contracts

Insolvency Protection

Completion

Buildmark Certificate

Submit

Exchange Date

Purchase Price

Has the completion taken place? *

1. We will need to enter the exchange date and purchase price.
2. This question decides the page you move to when pressing 'Save & Continue'
 - If you answer '**Yes**' you go straight to the completion page to activate the Buildmark Certificate.
 - If you answer '**No**' you will land on the insolvency protection page (to submit for an insolvency protection certificate).

Plot details

NHBC Conveyancing My Organisation portal01@dev-nhbc.co.uk

Policy Number: AH035112 Plot Number: 16 Site: Heaton Park Church, New Town Street, PRESTWICH, GREATER MANCHESTER, M25 1

Step 1 of 6 - Plot Details

Due Diligence Cancel Save & Exit **Save & Continue**

1 Your Reference
Test 2

2 Property Address: Address Line 1
Address Line 2
Town
POST CODE

3 Occupancy Type
Owner Occupier

If you update the occupancy type after adding the purchasers details, this could result in those purchasers being removed

Purchaser(s):
Please review and edit your client details such as their correspondence address by clicking the edit icon

4 Dafly Duck dduck@dlh-nhbc.co.uk

5

+ Add Purchaser

[Click here if this home is being built for your clients by a builder they have contracted](#)

If you clicked yes to fully activate the policy, this is where you will be asked to add:

1. A reference of your choice (not compulsory)
2. The address of the new property (using the postcode search)
3. The occupancy type of the purchaser(s)
4. Name and contact details of the purchaser(s)
5. Once everything is updated, click 'Save & Continue'.

Examples of activated screens for insolvency and full warranty

Step 3 of 6 - Insolvency Protection Due Diligence < Previous Save & Exit Submit

You are about to activate the insolvency protection for this plot. Please review the details and Submit when you're ready.

Extent of Cover
Insolvency protection is 10% of the selling price of £100,000 whichever is less. Cover for the loss of deposit or having to pay more to complete the building of the home as a result of the builder becoming insolvent. Any agreed variation to the standard cover set out in the Buildmark policy booklet can be found in the endorsements section of the Summary of cover, Insolvency cover certificate and the Buildmark certificate.

Plot Details

Property Address:	Address Line 1 Address Line 2 Town PO52 0DE
Occupancy Type:	Owner Occupier
Purchaser(s):	Daffy Duck (dduck@di1-nhbc.co.uk)

Exchange Details

Exchange Date:	13/10/2023
Anticipated Completion Date:	30/12/2023
Deposit Amount:	£35,000
Purchase Price:	£350,000

Progress: Plot Details, Exchange of Contracts, **Insolvency Protection**, Completion, Buildmark Certificate, Submit

1

Example:

1. Submission for the insolvency protection certificate.
2. Submission for NHBC Buildmark Certificate.
3. If the submitted application goes well, this pop up will show.

Step 5 of 6 - Warranty Certificate Due Diligence < Previous Save & Continue

You're about to activate the warranty for this plot. Please review the details provided and click Submit when you're ready.

Plot Details

Property Address:	Address Line 1 Address Line 2 Town PO52 0DE
Occupancy Type:	Owner Occupier
Purchaser(s):	Daffy Duck (dduck@di1-nhbc.co.uk)

Exchange

Deposit Amount:	£35,000
Exchange Date:	13/10/2023


Completion

Completion Date:	30/11/2023
Purchase Price:	£350,000

Progress: Plot Details, Exchange of Contracts, Insolvency Protection, **Completion**, Buildmark Certificate, Submit

2

3

 The case has been Submitted.

Example if cover is not yet available

Should there be any reason that the cover cannot yet be activated, the system will give you more information about this.

Example:

Policy Number: **AZ011441** Plot Number: **1** Site: **14 Hambrook Lane, Stoke Gifford, Bristol, BS34 8QB**

Step 6 of 6 - Submit Due Diligence Finish

- Plot Details
- Exchange of Contracts
- Insolvency Protection
- Completion
- Buildmark Certificate
- Submit

Policy Final Date
Our records indicate the final inspection may not have taken place for this plot, therefore there may be a delay in receiving the Insurance Certificate.

The case has been Referred to NHBC for review, and we will contact you within 3 working days.

Purchase price referral	Our system indicates a difference between the anticipated selling price and purchase price for this home, we will require the completion statement
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It is worth making a note of these details and then clicking the Finish button.

You can then contact us or the developer accordingly.

Need support?

For more information about My NHBC Portal, please contact NHBC's Portal Support team on 0344 633 1000 or email us at ccsupport@nhbc.co.uk

