Conveyancing Portal.

Activate a policy



Locate the policy you added

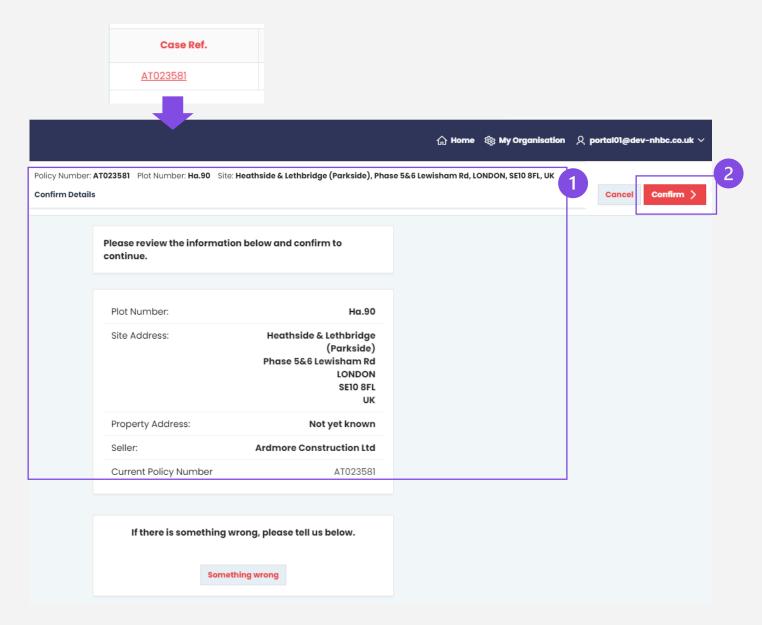


- 1. From the main home screen, click 'New Cases'.
- 2. Locate the policy and click on the red policy number.

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	-	1-	-	J A Pye (Oxford) Ltd	9	AW129163	×
AW129160	-	-	-	J A Pye (Oxford) Ltd	6	AW129160	×



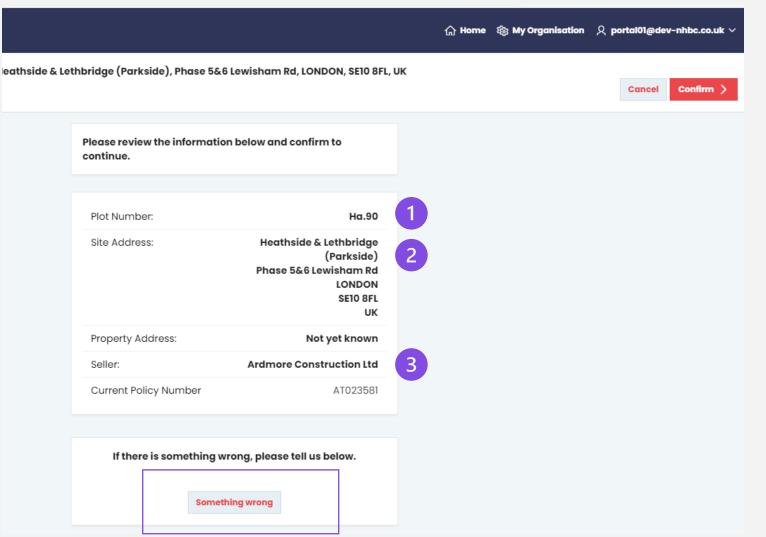
Confirm details



- 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



However ...

If any of the details are incorrect:

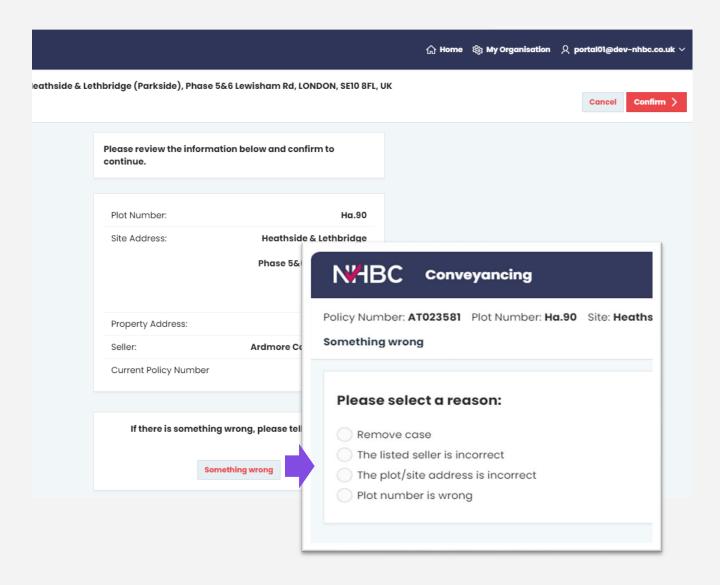
Select the 'Something wrong' button at the bottom of the screen.

Examples of incorrect information:

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



Confirm details



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

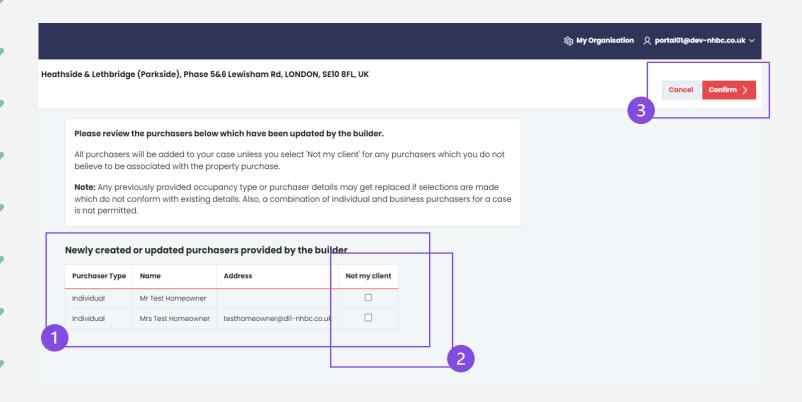
Go ahead and choose the appropriate option.

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



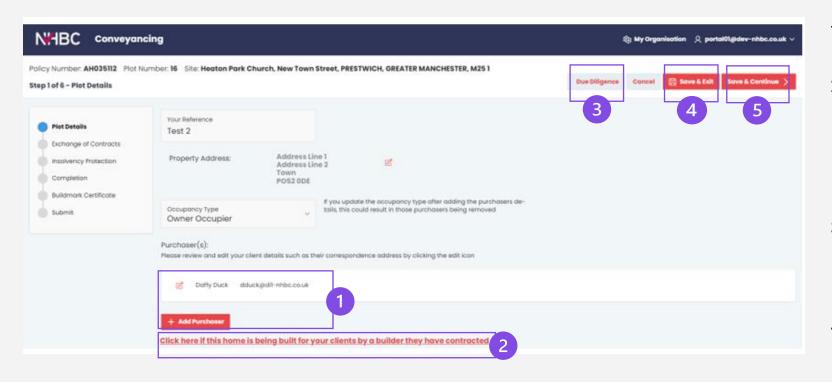
If the details were correct (and you had clicked on 'Confirm' instead of 'Something wrong'), this page will appear:

- 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

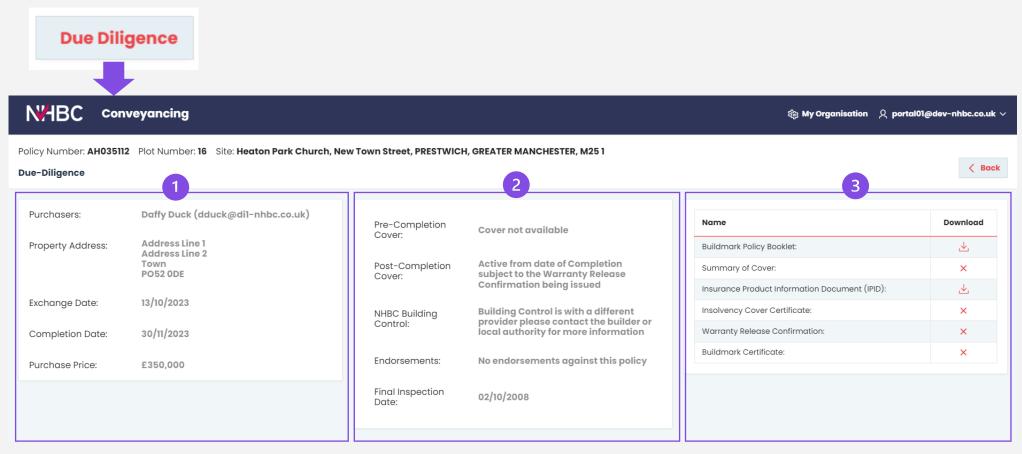
Plot Details is the first stop to capture the purchase details.



- 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.



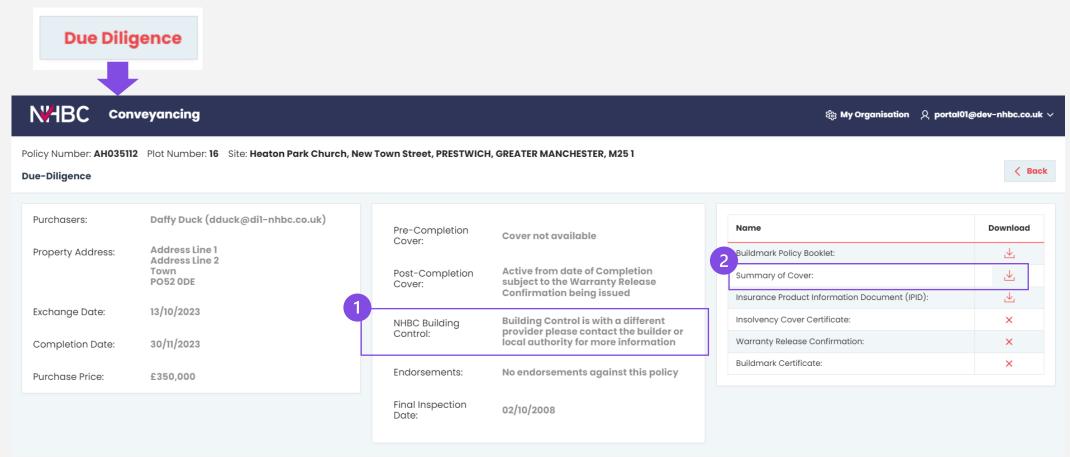
Due diligence



- 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

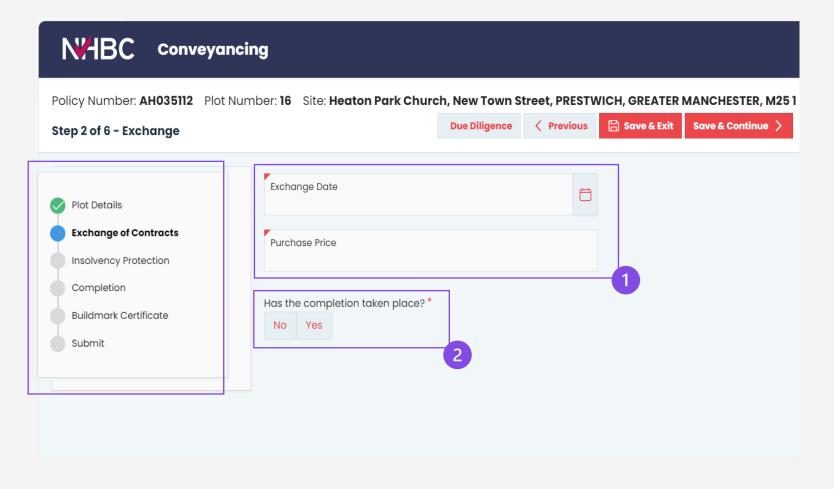


Regardless if the policy is activated, you will also be able to see:

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



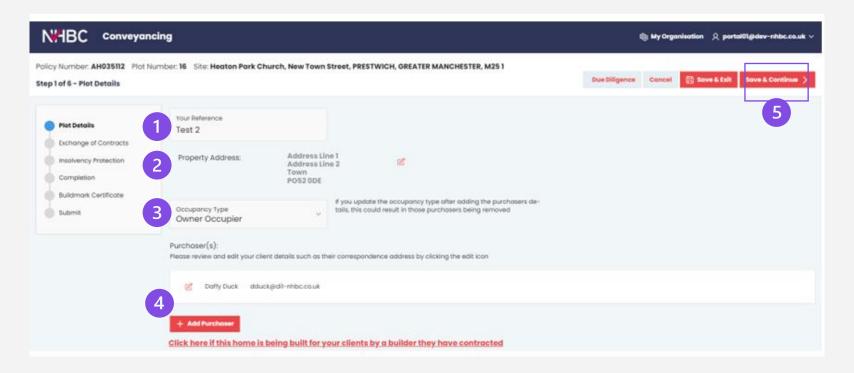
Exchange of contracts



- 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

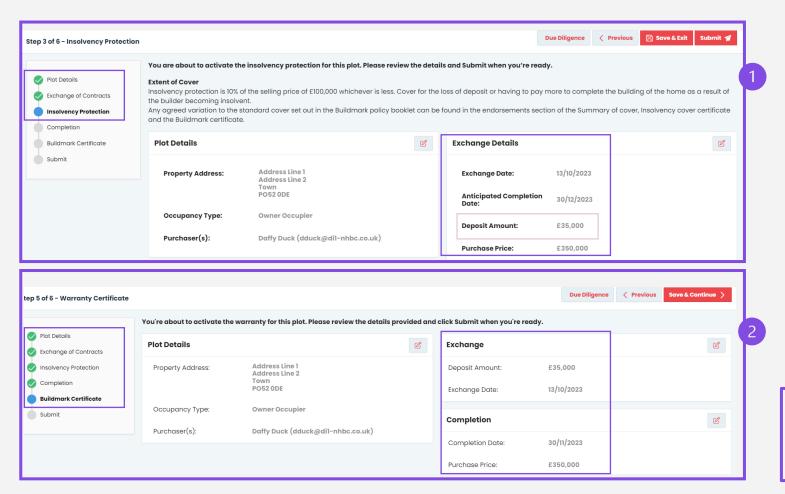


If you clicked yes to fully activate the policy, this is where you will be asked to add:

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



Examples of activated screens for insolvency and full warranty



Example:

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

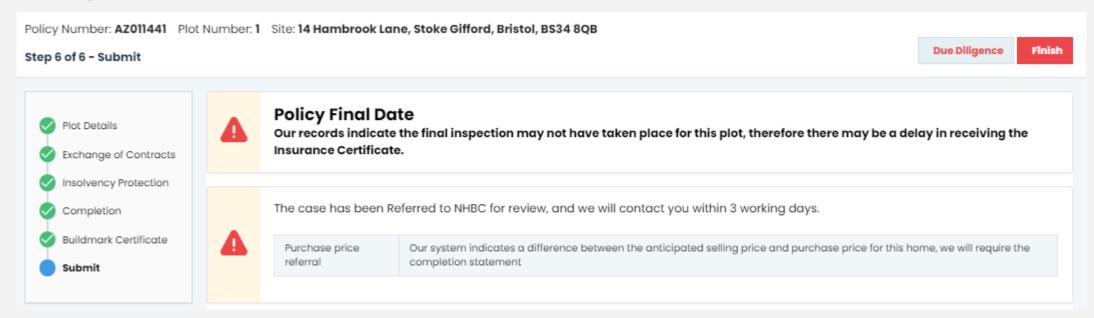




Example if cover is not yet available

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

Example:



- 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

