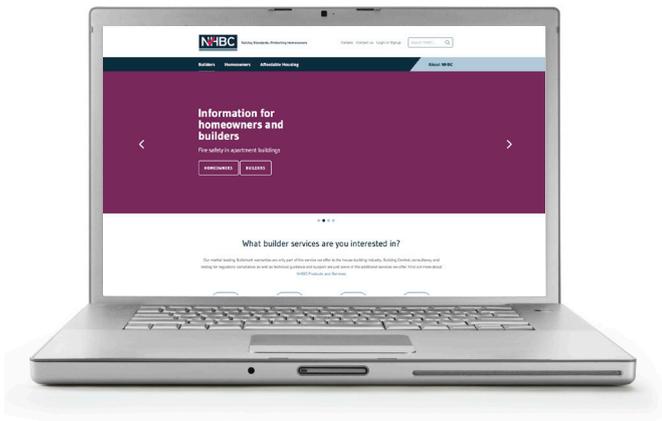


Contents

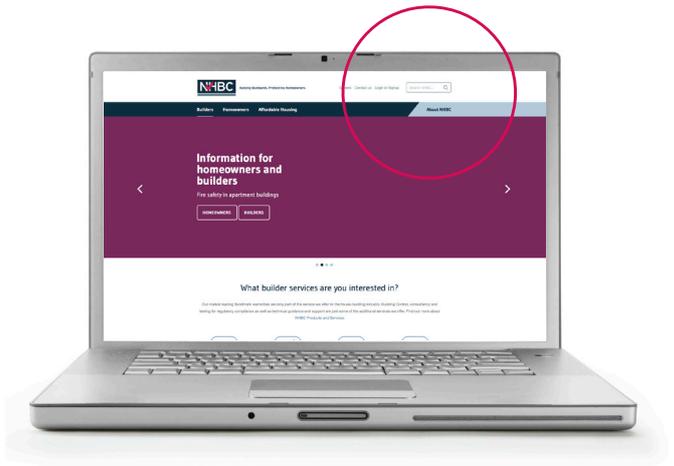
Register for an account – new company	2
Register for an account – existing company	6
Log in to your account	9
Reset your password	10
Update account information	11
Edit user details	12
Reassigning cases to another user	13
Add an office	14
Edit office details	15
List of cases for your office	16
How to add a new case	17
Overview of activating a policy – screen flow	18
Working on a case	19
How to complete plot details	20
How to check Buildmark policy pre-activation	22
How to check and activate Buildmark	23
If acting as a vendor conveyancer	24
IDD documentation for homeowners	27
If you are working on a case and something is wrong	28
Alerts – information conflict resolution	29
Alerts – referral to NHBC Customer Services	29
Alerts – invalid email address supplied	30
Alerts – cases that need your attention	31

Register for a new account – new company

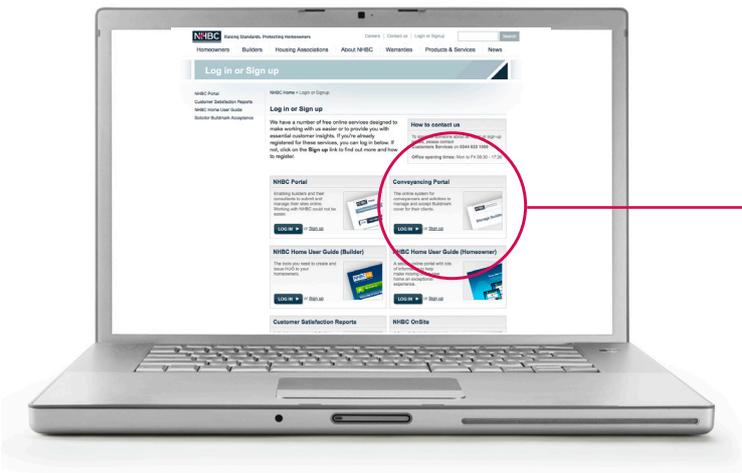
1. Go to NHBC website



2. Click on 'Log in or Sign up'



3. In Conveyancing Portal box, select 'Sign up'



Conveyancing Portal

The online system for conveyancers and solicitors to manage and accept Buildmark cover for their clients.



LOG IN or [Sign up](#)

4. You will be taken to a claim case form

5. Have your policy number and activation code to hand

6. Complete the form with relevant details and click 'Request access'

Claim Case

5

Policy number

Activation code

Your email address

 Refresh

Enter text shown in image

6

Claiming a case

To claim a case you will need the NHBC policy number and the activation code which you may have been sent by your builder

Please add the email address that you wish to use with the portal (or that you have used with it previously)

You will also need to enter the number shown in the graphic into the box below to confirm that you are a valid user. If you cannot see what that says click **Refresh** for a new number

Once you have entered all the details required click **Request access** to continue.

Help page ref: CCHELP1

7. You will be asked to request access to the Conveyancing Portal – click 'Request access'



Claim Case

You need to register for conveyancing with your user: testso176823@gmail.com before you can claim the case.

< No thanks **Request access**

You need to set up your account

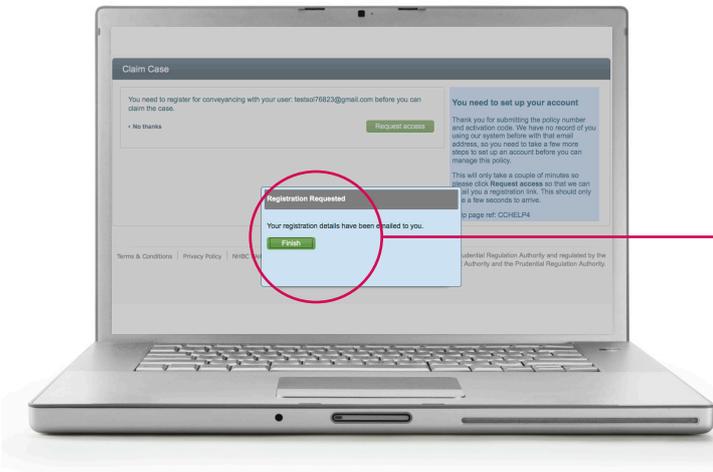
Thank you for submitting the policy number and activation code. We have no record of you using our system before with that email address, so you need to take a few more steps to set up an account before you can manage this policy.

This will only take a couple of minutes so please click **Request access** so that we can email you a registration link. This should only take a few seconds to arrive.

Help page ref: CCHELP4

8. A message will appear telling you that your registration details have been sent to you

9. Click 'Finish'



Registration Requested

Your registration details have been emailed to you.

Finish

10. You will receive an email to register

NHBC NHBC Conveyancing Portal

NHBC Conveyancing Portal

Registration request
Dear buster@catinabush.com

How to register for conveyancing

Following your request to claim as case for policy AP020541, please click on the link below and follow the on-screen instructions.
[Register for Conveyancing Portal](#)
Please note: If not used this link will expire within 21 days.

NHBC House, Davy Avenue, Knowlhill, Milton Keynes, Bucks MK5 8FP
Tel: 0344 633 1000 Fax: 01908 747255 www.nhbc.co.uk NHBC is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. CC_REG_REQ

11. Click on 'Register for Conveyancing Portal'

NHBC NHBC Conveyancing Portal

NHBC Conveyancing Portal

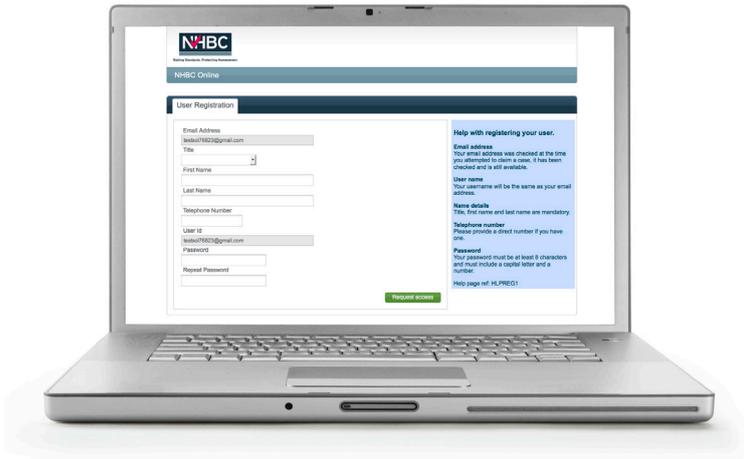
Registration request
Dear buster@catinabush.com

How to register for conveyancing

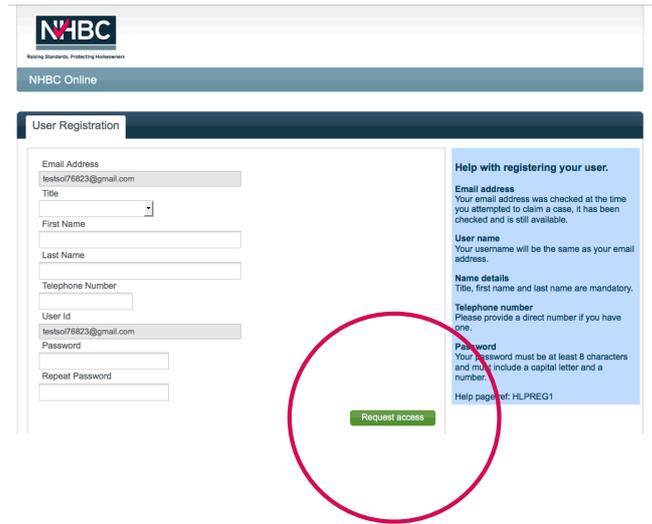
Following your request to claim as case for policy AP020541, please click on the link below and follow the on-screen instructions.
[Register for Conveyancing Portal](#)
Please note: If not used this link will expire within 21 days.

NHBC House, Davy Avenue, Knowlhill, Milton Keynes, Bucks MK5 8FP
Tel: 0344 633 1000 Fax: 01908 747255 www.nhbc.co.uk NHBC is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. CC_REG_REQ

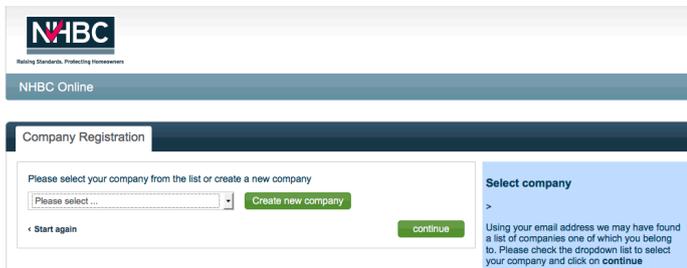
12. The next screen 'User Registration', asks you for user and password details



13. After completing, click 'Request access'



14. Complete office details and click 'create office'



Points of note

You will only need to go through the process of setting up an account for your first case, thereafter you will go in via the CP Log in page.

If there are already users of CP in your business, they have the ability to add you as a user.

15. Enter company registration details and click 'continue'

Office Registration

* Office name

Address line 1

Address line 2

Address line 3

Town

County

* Postcode

Country

Int. code Area code Number Extn.

DX Number

16. Please confirm all details on next page and click 'Complete registration'

Confirm Registration

You are registering your account with the following company:

Company name
Alan E Masterston Solicitors

Office name
Second Floor Office

Address 1

Address 2
Knowhill

Town
Milton Keynes

Postcode
MK5 8FP

Country
United Kingdom

Your user details are:

Username
testsol76823@gmail.com

Title
Mr

First name
John

Last name
Smith

[Start again](#) Complete registration

Confirm registration details

Here you can see a summary of the information we will use to set up your account. Please check this carefully, and then read the Terms and Conditions at the bottom of the page. You will need to accept these terms to complete your registration.

If anything is incorrect here you can click on Create company or start again. If not please click **Complete registration** button to confirm your account

Help page ref: HLPREG7

17. Click 'proceed to conveyancing'

NHBC
Raising Standards. Protecting Homeowners

NHBC Online

Registration Complete

Congratulations! You have successfully registered.

[No thanks](#) proceed to conveyancing

Registration complete

You have successfully registered to use our Conveyancing system. Please click **proceed to conveyancing** where you will be asked to accept our terms and conditions and then use the system.

Help page ref: HLPREG2

18. Finally click 'Accept' to accept terms and conditions

Terms and Conditions

Conveyancing Portal Terms of Use

Date of Last Review: 26 January 2017

These terms and conditions set out the terms on which you may use of the Conveyancing Portal site ("Site") operated by National House-Building Council ("NHBC"). These terms and conditions are in addition to the NHBC Terms of Website Use <http://www.nhbc.co.uk/Legal/WebsiteTermsUse/> which also apply to any use of the Site.

1 Use and Registration

- 1.1 You are only permitted to use the Site if you accept all of the terms and conditions set out below.
- 1.2 You must register with the Site before you can access and use the Site. In order to register you must provide certain information. The information which you provide in connection with your application for registration must be accurate, current and complete.
- 1.3 By clicking on the "accept" button you ("user", "you" or "your") signify that you have read, understood and agree to be bound by these terms and conditions ("Terms of Use"). You should, therefore, read these Terms of Use carefully before clicking the "accept" button.
- 1.4 Your use of the Site is entirely at NHBC's discretion. NHBC reserves the right to refuse and/or suspend or terminate your use of the Site without giving you notice or reason (including, but not limited to, in the event that you breach any of these Terms of Use).

2 Passwords

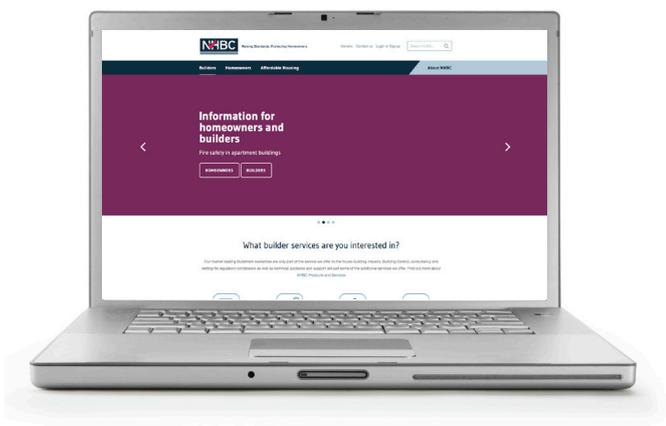
- 2.1 Each registration is for a single user only. As part of the registration process and in connection with the creation of your account you will be required to provide your email address and password for use to access the Site. You must at all times treat your password as confidential, and not disclose it to any third party.
- 2.2 You must take appropriate security measures to prevent unauthorised disclosure of your password and you must notify NHBC immediately if your password becomes known to any unauthorised user.
- 2.3 Any breach of these Terms of Use by anyone to whom you disclose your password will be treated as if the breach had been committed by you and will not relieve you of your obligations and liabilities under these Terms of Use
- 2.4 You must update the system with any changes to your registration details

[Do not accept](#) [Download](#) [Accept](#)

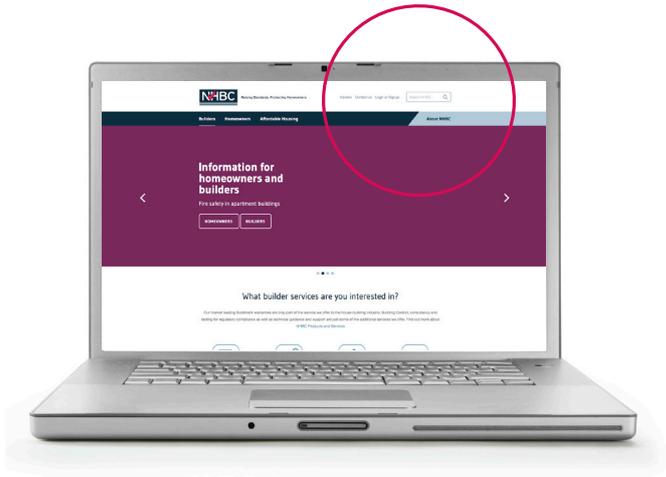
You have now created an account – you are now logged in

Register for an account – existing company

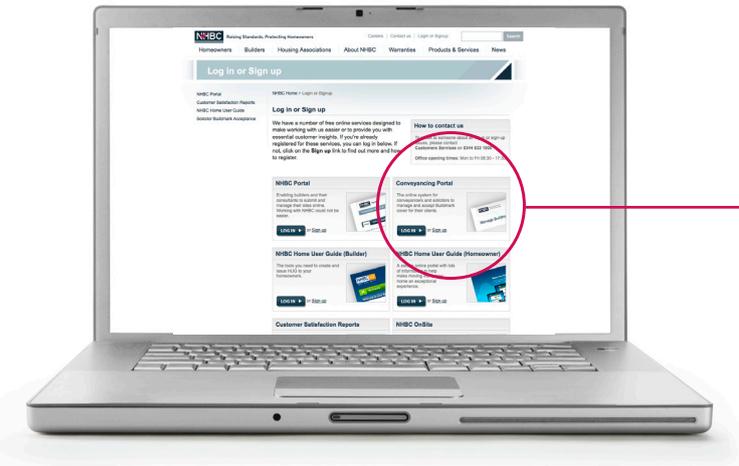
1. Go to the NHBC website www.nhbc.co.uk



2. Click on 'Log in or Sign up'



3. In Conveyancing Portal box, select 'Sign up'



Conveyancing Portal

The online system for conveyancers and solicitors to manage and accept Buildmark cover for their clients.



LOG IN or [Sign up](#)

4. You will be taken to a claim case form

5. Have your policy number and activation code to hand

6. Complete the form with relevant details and click 'Request access'

Claim Case

5

Policy number

Activation code

Your email address

 Refresh

Enter text shown in image

6 **Request access**

Claiming a case

To claim a case you will need the NHBC policy number and the activation code which you may have been sent by your builder

Please add the email address that you wish to use with the portal (or that you have used with it previously)

You will also need to enter the number shown in the graphic into the box below to confirm that you are a valid user. If you cannot see what that says click **Refresh** for a new number

Once you have entered all the details required click **Request access** to continue.

Help page ref: CHELP1

7. You will be asked to request access to the Conveyancing Portal – click 'Request access'

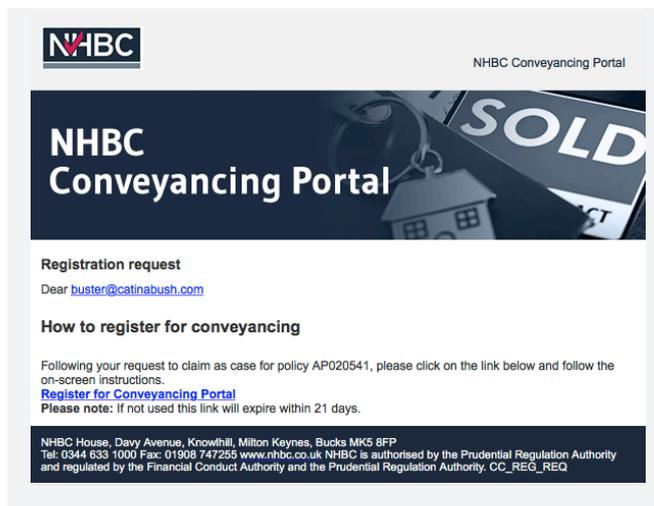


8. A message will appear telling you that your registration details have been sent to you

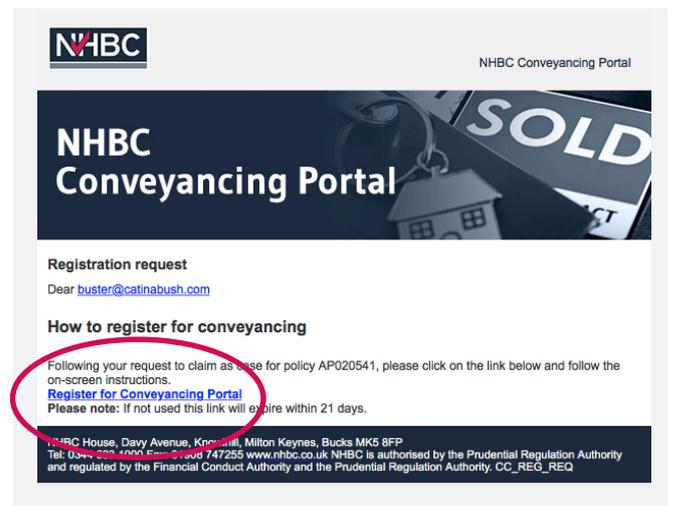
9. Click 'Finish'



10. You will receive an email to register



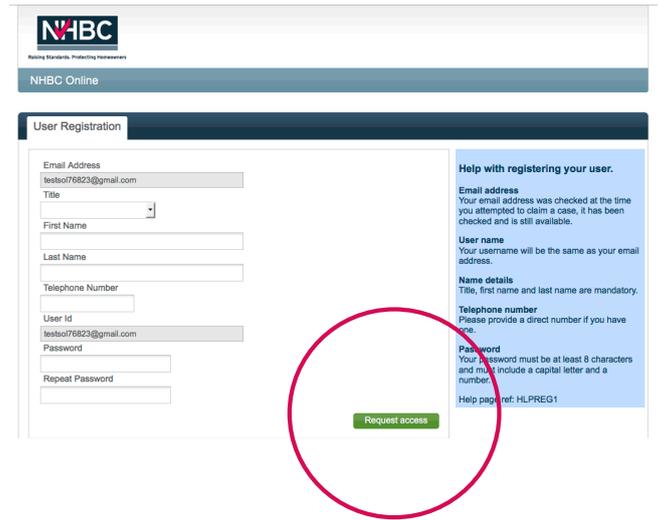
11. Click on 'Register for Conveyancing Portal'



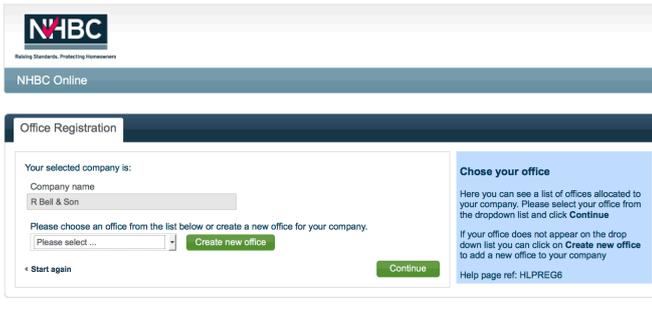
12. The next screen called 'User Registration', asks you for user and password details



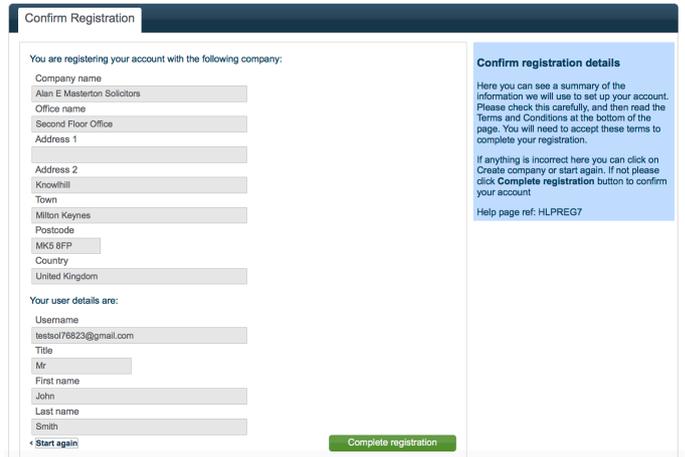
13. After completing, click 'Request access'



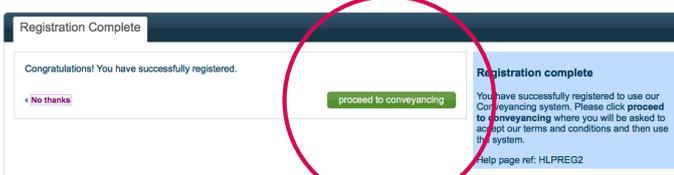
14. Choose office from list or create new in office registration area and click 'Continue'



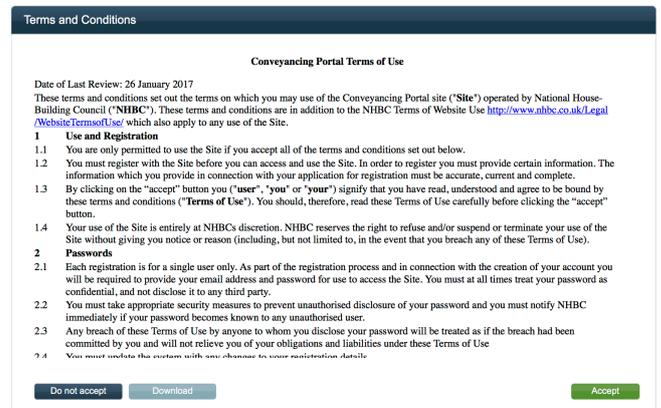
15. Review details and click 'Complete Registration'



16. Congratulations you have successfully registered, click 'proceed to conveyancing' to start working on your policies

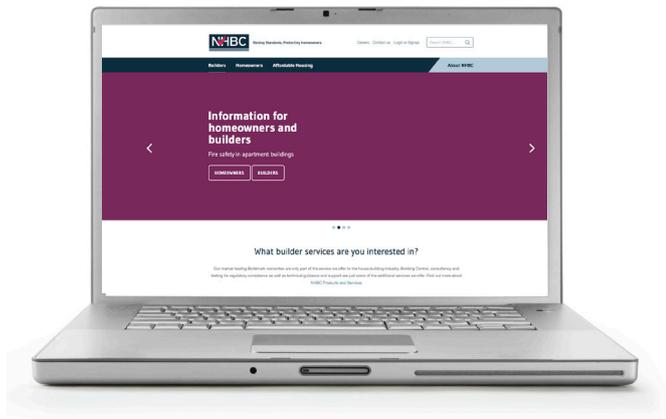


17. Finally click 'Accept' to accept terms and conditions

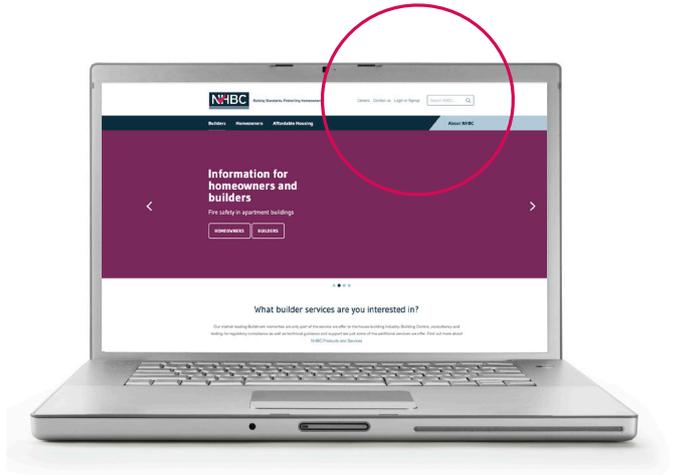


Log in to your account

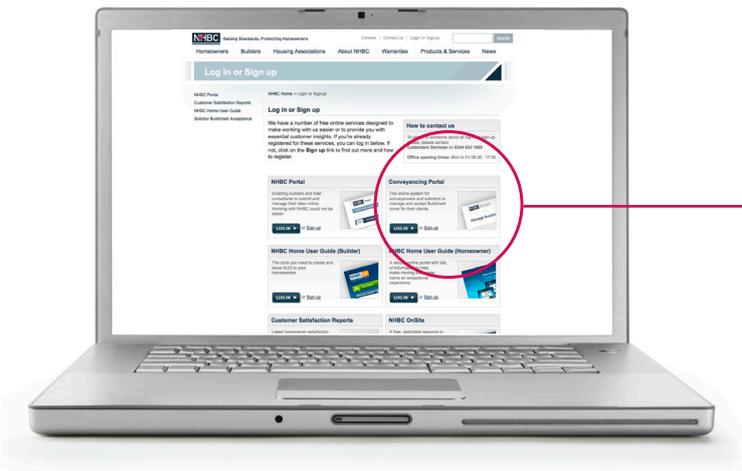
1. Go to the NHBC website www.nhbc.co.uk



2. Click on 'Log in or Sign up'



3. In Conveyancing Portal box, select 'Log in'



Conveyancing Portal

The online system for conveyancers and solicitors to manage and accept Buildmark cover for their clients.



LOG IN or [Sign up](#)

4. Enter your email address and password

Conveyancing

Username

Password

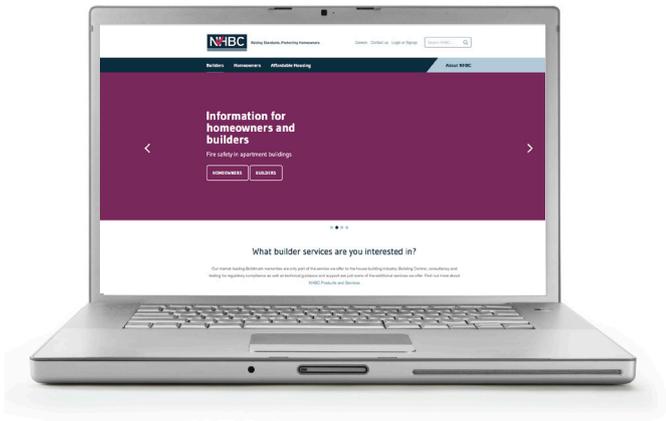
[Reset your password](#)

Please note
Your username is always your email address

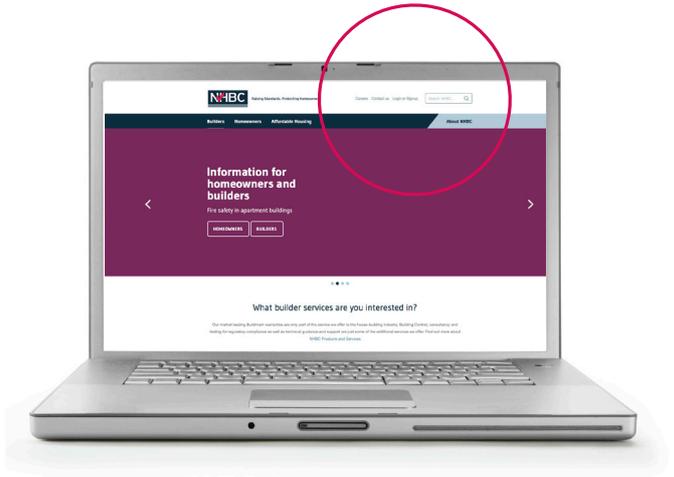
5. Follow the instructions in the email that you will receive

Reset your password

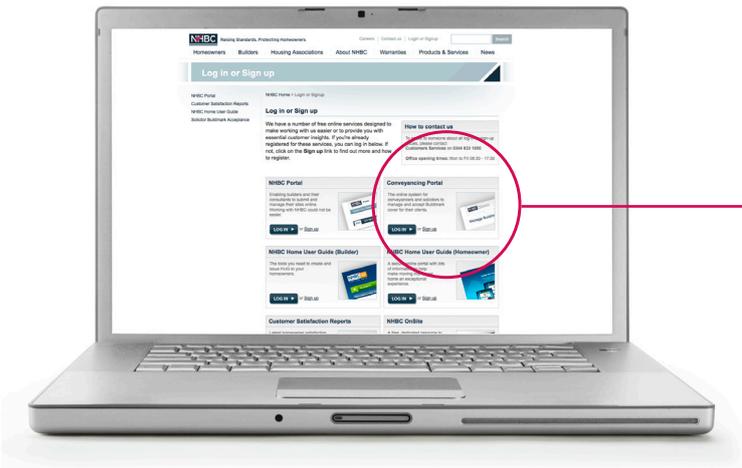
1. Go to the NHBC website www.nhbc.co.uk



2. Click on 'Log in or Sign up'



3. In Conveyancing Portal box, select 'Log in'



Conveyancing Portal

The online system for conveyancers and solicitors to manage and accept Buildmark cover for their clients.



[LOG IN](#) or [Sign up](#)

4. Select reset your password

Conveyancing

Username e.g. me@domain.com

Password

[Reset your password](#)

[Sign In](#)

Please note
Your username is always your email address

Update account information

1. Log in to Conveyancing Portal
2. From landing page – select 'Settings'

Settings

My cases Office Add case Archive

New cases

Case Ref	Homeowner	Address	Builder	Plot	Policy No
There are no new cases.					

Add a case

Active cases

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
There are no active cases.							

Go to archive

List of users from the current office selected are displayed in top box

Settings

User management Company details

Users: Head Office, 6 Tynne Square Bletchley, MK3 7QA, Milton Keynes show deactivated users

User	Email	New cases	Active	Referred	Last used	Status
Mr Buster Smith	buster@catinabush.com	1	1	0	12 September 2017	ACTIVE
Mr Brad Cat	brad@catinabush.com	0	0	0	01 August 2017	ACTIVE
Mrs Emma Barb	barb@catinabush.com	1	1	1	20 July 2017	ACTIVE

New user

List of users from other offices selected, are displayed in bottom box

Edit user details

1. Log in to Conveyancing Portal
2. From landing page – select 'Settings'
3. Click the user you wish to edit

Cases **Settings**

User management Company details

Users: Head Office, 6 Tyne Square Bletchley, MK3 7QA, Milton Keynes show deactivated users

User	Email	New cases	Active	Referred	Last used	Status
Mr Buster Smith	buster@catinabush.com	1	1	0	09 August 2017	ACTIVE
Mr Brad Cat	brad@catinabush.com	0	0	0	01 August 2017	ACTIVE
Mrs Emma Barb	barb@catinabush.com	0	0	1	20 July 2017	ACTIVE

[New user](#)

4. You can edit a contact name, number and office address OR reassign cases from one user to another

Cases **Settings**

User management Company details

User details

Title: Mrs

First name: Emma

Last name: Barb

Telephone: 01908000000

Email address: barb@catinabush.com

Office: Head Office, 6 Tyne Square Bletchley, Milton Keynes

Cases show archived cases

Case Ref	Homeowner	Address	BuilderName	Plot	Policy No	Status	Select All
	Miss test DOC	5, Royal Mews, Station Road LE65 2GJ	PTL Properties Limited	16	AH066899	REFERRED	<input type="checkbox"/>

[Reassign](#)

[Back](#)

Please note

You cannot edit the email addresses as these are used as user names

Reassigning cases to another user

1. Log in to Conveyancing Portal
2. From landing page – select 'Settings'
3. Select the user that the cases are currently assigned to
4. Choose the cases you wish to reassign by ticking "select all" or by clicking the box next to each applicable case

Settings

User management Company details

User details

Title: Mr
First name: Buster
Last name: Smith
Telephone: 01908 745865
Email address: buster@catinabush.com
Office: Head Office, 6 Tyne Square Bletchley, Milton Keynes

Buttons: Deactivate, Activate, Re-invite, Update

Cases show archived cases

Case Ref	Homeowner	Address	BuilderName	Plot	Policy No	Status	Select All
	Mrs Homeowner	61 Abercrombie Gardens SO16 8FR	Berkeley Homes (East Thames)Limited	E002	AP060531	COMPLETED	<input checked="" type="checkbox"/>
		55, Royal Mews LE65 2GL	PTL Properties Limited	55	AH049319	ACTIVE	<input checked="" type="checkbox"/>
		Site: Land Adjacent A43/A427, Weldon Park, NN17 3JW	Persimmon Homes Midlands	9	AQ001681	ACTIVE	<input checked="" type="checkbox"/>

Buttons: Reassign

5. Once you have completed your selection, click 'Reassign',

55, Royal Mews
LE65 2GL
Site: Crowhill Green, Off Hardings
Lane, SO50 8

PTL Properties Limite
Bloor Homes Southern
Division of Bloor Hom
Ltd

Buttons: Reassign, Back

6. Choose the new user from the drop down list

Transfer case(s)

Please select the user to whom case(s) should be reassigned :

Click Next to reassign to user above.

Buttons: Cancel, Next

7. Click 'Next'

Transfer case(s)

Please select the user to whom case(s) should be reassigned :

Click Next to reassign to user above.

Buttons: Cancel, Next

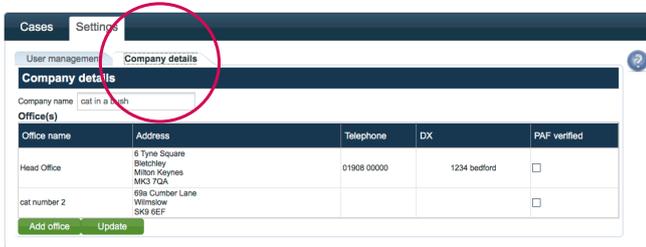
8. You have now reassigned the case

Please note
You can only reassign to a user in the list. A new user would need to register an account first

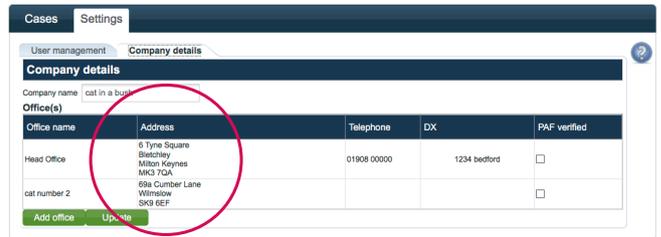
Add an office

1. Log in to Conveyancing Portal
2. From landing page – select 'Settings'

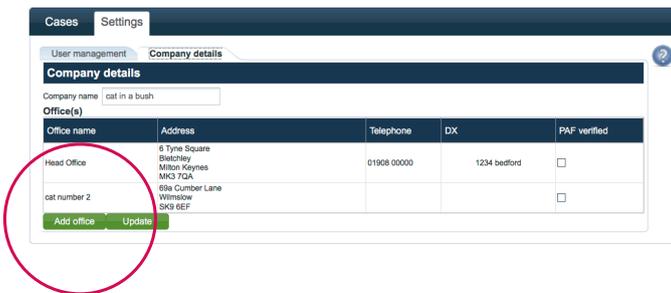
3. Select 'Company details' in tab



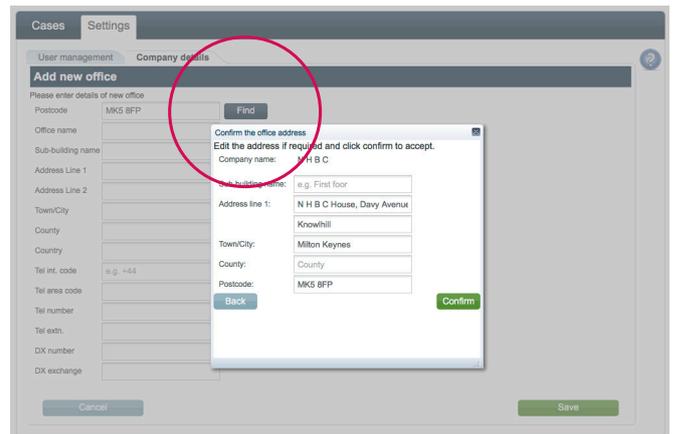
4. Company name and office addresses will be displayed



5. Click 'Add office'

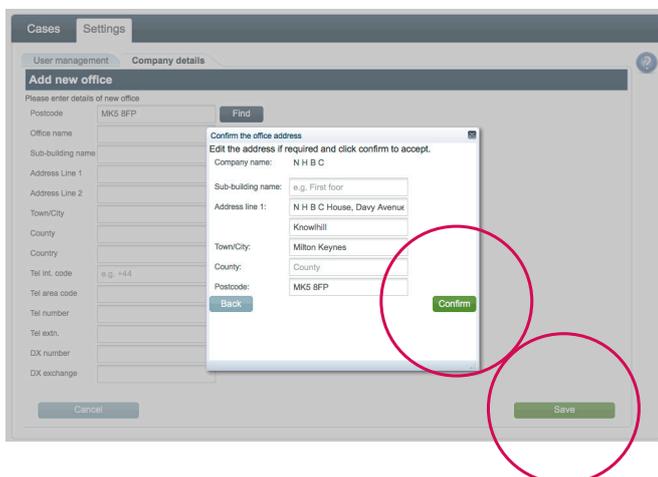


6. Enter the postcode and address details and click 'Find' to search for the address of the office. A pop up box will appear



7. A list of matching addresses will be displayed. Select your address and 'Confirm'

8. The pop up box will then disappear, click 'save'



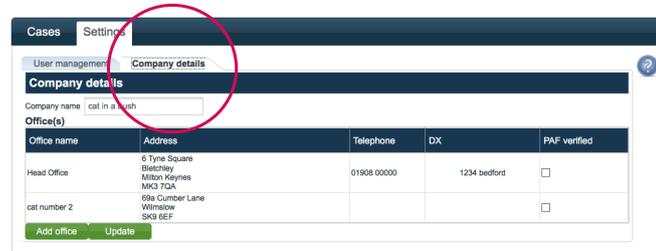
9. The new office address will now appear in the list



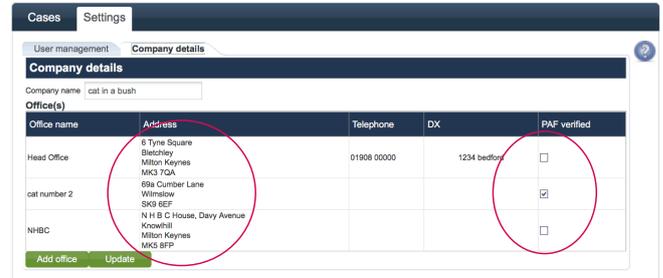
Edit office details

1. Log in to Conveyancing Portal
2. From landing page – select 'Cases'

3. Select 'Company details' tab. Company name and office addresses will be displayed



4. Click on the office you wish to edit



5. Details page appears

Postcode: MK3 7QA [Find]

Office name: Head Office

Sub-building name: 6 Tyne Square

Address Line 1: Bletchley

Address Line 2:

Town/City: Milton Keynes

Country: United Kingdom

Tel int. code: e.g. +44

Tel area code: 01908

Tel number: 00000

Tel extn.:

DX number: 1234

DX exchange: bedford

[Cancel] [Save]

6. Update information, click 'confirm' then 'Save'

Confirm the office address

Edit the address if required and click confirm to accept.

Company name:

Sub-building name: e.g. First floor

Address line 1: 6 Tyne Square

Bletchley

Town/City: Milton Keynes

County:

Postcode: MK3 7QA

[Back] [Confirm]

[Cancel] [Save]

List of cases for your office

1. Log in to Conveyancing Portal
2. From landing page – select 'Settings'

3. Select 'Office' tab to view a list of all cases assigned to your office

The screenshot shows the 'Settings' tab selected in the top navigation bar. Below it, the 'Office' sub-tab is active. The interface displays two tables: 'New cases' and 'Active cases'. The 'New cases' table has columns for Case Ref, Homeowner, Address, Builder, Plot, and Policy No. The 'Active cases' table has columns for Case Ref, Type, Status, Homeowner, Address, Builder, Plot, and Policy No.

Case Ref	Homeowner	Address	Builder	Plot	Policy No
buster@catinabush...		55, Royal Mews LE65 2GL	PTL Properties Limited	55	AH049319

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
barb@catinabush.com	P	REFERRED	Miss test DOC	5, Royal Mews, Station Road LE65 2GJ	PTL Properties Limited	16	AH066899

4. You can search for active cases by typing your case reference, homeowner, address, plot number or policy number into these boxes

The screenshot shows the 'Active cases' table with search filters highlighted. The search filters are Case Ref, Homeowner, Address, Plot, and Policy No.

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
barb@catinabush.com	P	REFERRED	Miss test DOC	5, Royal Mews, Station Road LE65 2GJ	PTL Properties Limited	16	AH066899
buster@catinabush...	P	COMPLETE	Mrs Homeowner	61 Abercrombie Gardens SO16 8FR	Berkeley Homes (East Thames)Limited	E002	AP060531
barb@catinabush.com	P	ACTIVE		Site: Crowdhill Green, Off Hardings Lane, SO50 8	Bloor Homes Southern - A Division of Bloor Homes Ltd	171	AQ044076

[Go to archive](#)

5. Archived cases can be found by selecting the 'Go to archive' button or by selecting the 'Archive' tab. This allows you to view all historic policies you have activated (cases are automatically archived 30 days after completion/final certificate has been updated). If case was added by someone else within your company, click 'Company archive to view

The screenshot shows the 'Active cases' table with the 'Go to archive' button highlighted.

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
barb@catinabush.com	P	REFERRED	Miss test DOC	5, Royal Mews, Station Road LE65 2GJ	PTL Properties Limited	16	AH066899
buster@catinabush...	P	COMPLETE	Mrs Homeowner	61 Abercrombie Gardens SO16 8FR	Berkeley Homes (East Thames)Limited	E002	AP060531
barb@catinabush.com	P	ACTIVE		Site: Crowdhill Green, Off Hardings Lane, SO50 8	Bloor Homes Southern - A Division of Bloor Homes Ltd	171	AQ044076

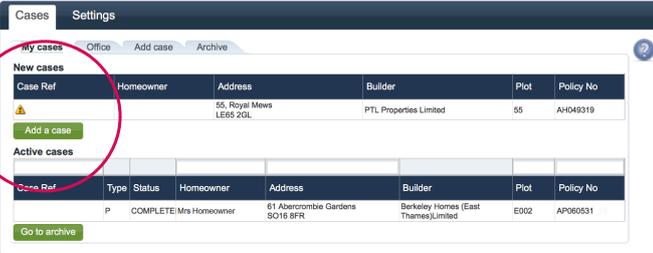
[Go to archive](#)

How to add a new case

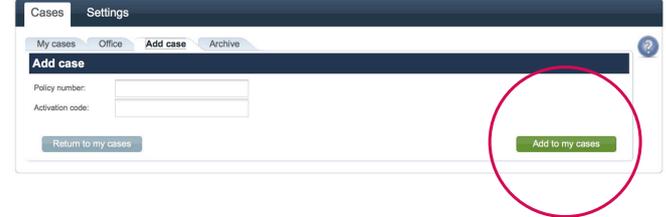
1. Log in to Conveyancing Portal

2. From landing page – select 'Cases'

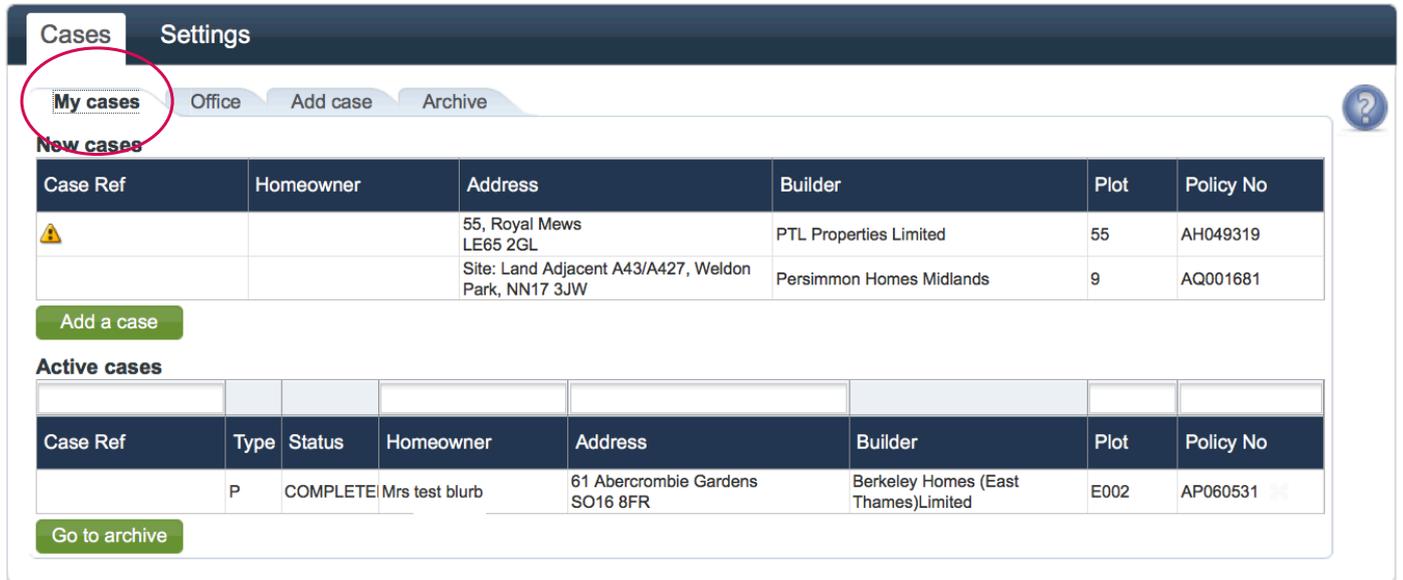
3. To add a case, either select 'Add case' tab or 'Add a case' button



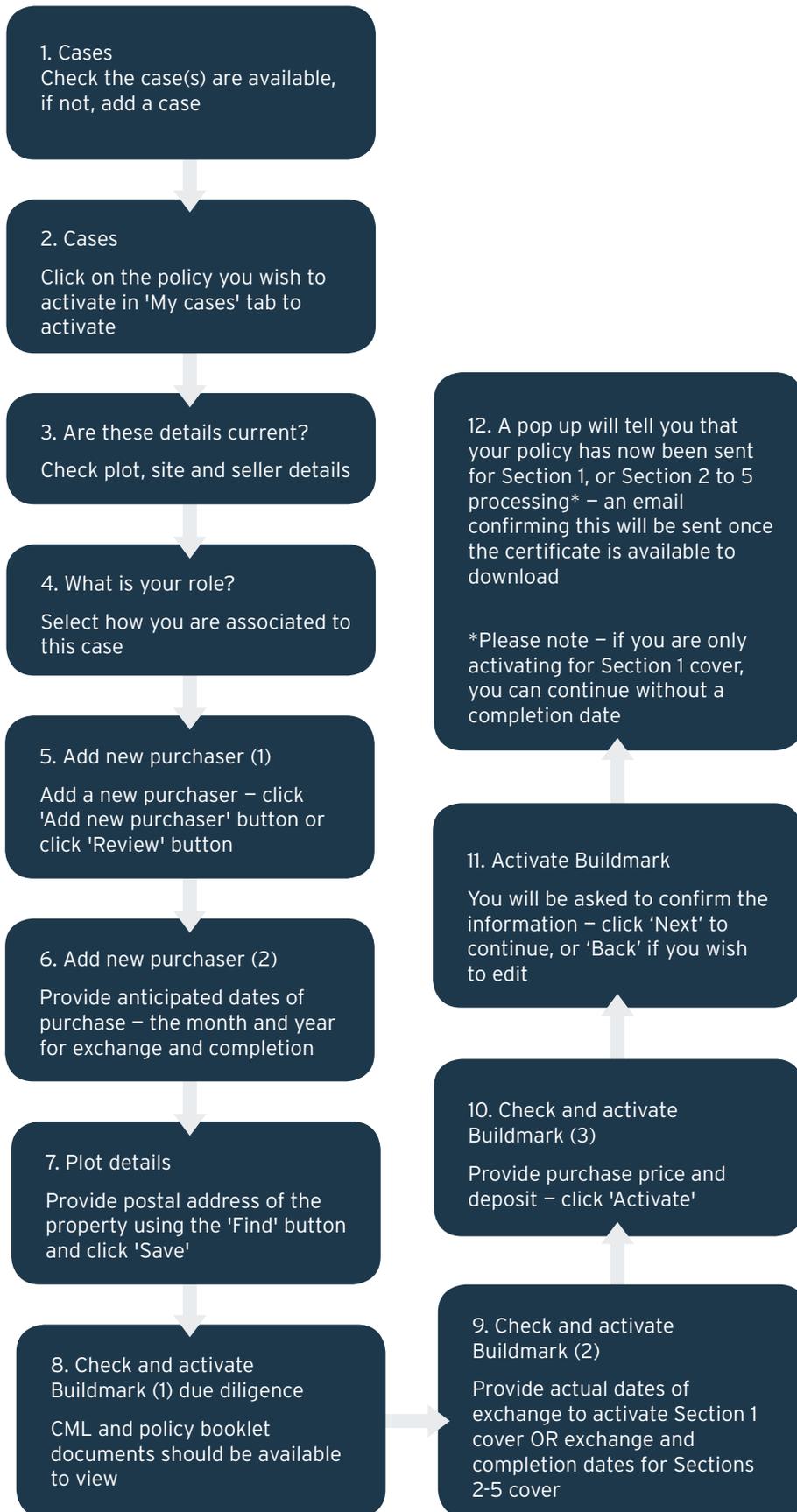
4. Enter policy number and activation code. Click 'Add to my cases' button



5. The case will now appear under your new case in the 'My cases' tab



Overview of activating a policy – screen flow



Working on a case

1. Within Cases tab select case from either 'New cases' or 'Active cases' list

The screenshot shows the 'Cases' tab with a 'Settings' sub-tab. Under 'My cases', there are three sub-tabs: 'Office', 'Add case', and 'Archive'. The 'New cases' section contains a table with the following data:

Case Ref	Homeowner	Address	Builder	Plot	Policy No
		55, Royal Mews LE65 2GL	PTL Properties Limited	55	AH049319
		Site: Land Adjacent A43/A427, Weldon Park, NN17 3JW	Persimmon Homes Midlands	9	AQ001681

Below the table is a green 'Add a case' button. The 'Active cases' section contains a table with the following data:

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
	P	COMPLETE	Mrs Homeowner	61 Abercrombie Gardens SO16 8FR	Berkeley Homes (East Thames)Limited	E002	AP060531

Below the table is a green 'Go to archive' button. A red arrow points from the 'Add a case' button to the 'New cases' table.

2. Check the details are correct (Yes/No)

4. If the details are not correct you can tell us by clicking on the 'Tell us' button

The screenshot shows the 'Are these details correct?' screen with the following details:

Policy number: AQ001681
Plot No: 9
Site address: Land Adjacent A43/A427
Weldon Park
CORBY
NN17 3JW
Seller: Persimmon Homes Midlands trading as Persimmon Homes and Charles Church

Buttons: 'Return to my cases', 'Tell us' (circled in red), 'Yes. Continue'.

3. If yes – what is your role? Select whether you are acting on behalf of a purchaser or vendor. Click 'Next'

The screenshot shows the 'What is your role?' screen with the following details:

Policy number: AQ001681
Plot No: 9
Site address: Land Adjacent A43/A427
Weldon Park
CORBY
NN17 3JW
Seller: Persimmon Homes Midlands trading as Persimmon Homes and Charles Church

Buttons: 'Return to my cases', 'Next'.

Radio buttons for role selection:
 I am acting on behalf of the purchaser
 I am acting on behalf of the vendor

Please go to page 27

How to complete plot details

1. You can enter your own reference for this case here if you have one
2. The developer may have already provided the Purchaser information. If your client name is already listed on the screen, please click 'Review'. If the name of your client does not match, edit the information as appropriate
3. If a homeowner is not assigned – you will be able to click 'Add new'
4. Enter the postcode for the property being purchased and click 'Find'
5. Then click 'Save'
6. Then click 'Next'

The screenshot shows the 'Plot Details' form with the following elements and annotations:

- 1:** Points to the 'Your reference:' input field.
- 2:** Points to the 'Review' button in the 'Purchaser added by the seller' section.
- 3:** Points to the 'At least one homeowner needs to be added' error message.
- 4:** Points to the 'Find' button next to the 'Postcode' field.
- 5:** Points to the 'Save' button at the bottom of the address section.
- 6:** Points to the 'Next' button at the bottom of the page.

Additional form details: The 'Occupancy Type' is set to 'Owner Occupier'. The 'Property postal address' section contains: Postcode: SE16 6; Flat no: Flat no; First line: 321 The Water Gardens; Second line: Second line; Town: Canada Water; County: London.

Please note

You need to add at least one purchaser or 'Review' as client and the property postal address to enable the 'Next' button. Only remove a homeowner from the plot if they are not your client. If there are mistakes/errors you must **edit rather than remove the homeowner**

Referred cases **My cases** Office Search Archive 

Review purchaser

Policy number: AF343344 Plot: 4 Site:The Firs, 253 Amersham Road, HAZLEMERE, HP15 7. Cairmpark Properties Ltd

Details of selected purchaser:

Title:

First name:

Last name:

Home telephone no.:

Mobile telephone no.:

Email address:

[I have an email address](#)

I have a correspondence address

Please enter anticipated dates:

Date of exchange:

Date of legal completion:

1. When reviewing a purchaser, you should edit the name details if there are minor changes
2. You must NOT replace one homeowner with another on this screen
3. If the email address field is blank it is because we do not hold one for your client.
4. If you hold a valid email address for the client please click the 'I have an email address' link and enter the details
5. If the post-completion correspondence address is not the property address, please tick the 'I have a correspondence address' and enter the details
6. If the pre-completion correspondence address is different to the postal address, you can enter the client's correspondence address

Please note

You need to add at least one purchaser or 'Review' as client and the property postal address to enable the 'Next' button. Only remove a homeowner from the plot if they are not your client. If there are mistakes/errors you must **edit rather than remove the homeowner**

How to check Buildmark policy pre-activation

Under 'My cases' tab please select the case you want to check

1. Pro-forma will be available to view and download
2. IPID will be available to view and download
3. Download the pro-forma pack by clicking on the 'Download pro-forma pack' button

Referred cases **My cases** Office Search Archive

Check and Activate Buildmark

Policy number: AE134432 Plot: 321 Site: The Water Gardens, Canada Street, Canada Water, LONDON, SE16 6. Taylor Wimpey Central London trading as Taylor Wimpey UK Limited

Your reference: null

Seller: Taylor Wimpey Central London trading as Taylor Wimpey UK Limited

Purchaser(s) to be added: No Named Contact [Amend](#)

Postal address: 321 The Water Gardens
Canada Water
London
SE16 6ff

House type: Apartment

Exchange date:

Anticipated completion date:

Deposit amount:

Purchase price:

[Save](#)

Due Diligence

- **Pre-comp cover:**
Active from date of exchange [Tell me why](#)
- **Post-comp cover:**
Active from Date of Completion, subject to property finalling [Tell me why](#)
- **Construction state:**
- **NHBC Building Control:**
No
- **Endorsements:**
None
- **Policy documents:**
[view](#)
- **Pro-forma certificate:** [view](#) **1**
- **CML:**
Not currently available
- **IPID:** [view](#) **2**

[Download pro-forma pack](#) **3**

[Return to my cases](#) [Activate](#)

Please check the details and press 'Activate' to activate the policy.

How to check and activate Buildmark

Under 'My cases' tab please select the case you want to activate

1. Select House type
2. Enter Exchange date
3. Enter anticipated completion date (if known), deposit amount and purchase price
4. Select 'Save' to save details at this point, or 'Activate' if exchange date/has passed
5. Cases may be automatically referred to NHBC Customer Services if there are certain discrepancies

Cases Settings

My cases Office Add case Archive

Check and Activate Buildmark

Your reference: null Policy number: AP060531 Plot: E002 Site: 10 The Warren, Arsenal Site Off Arsenal Way, LONDON, SE18 6. Berkeley Homes (East Thames)Limited trading as Berkeley Group Plc

Seller: Berkeley Homes (East Thames)Limited trading as Berkeley Group Plc

Purchaser(s) to be added: Mrs Homeowner [Amend](#)

Postal address: 61 Abercrombie Gardens Southampton SO16 8FR

House type: Semi-Detached House

Exchange date: 30/09/2015

Completion date: 10/10/2015

Deposit amount: £42,000.00

Purchase price: £425,000.00 [Save](#)

[Return to my cases](#)

Due Diligence

- **Pre-comp cover:**
Not active [Tell me why](#)
- **Post-comp cover:**
Not available [Tell me why](#)
- **Construction state:**
Finalled 30 September 2015
- **NHBC Building Control:**
Yes, Finalled 30 September 2015
- **Endorsements:**
[view](#)
- **Policy documents:**
[view](#)
- **Insurance certificate:**
[view](#)
- **CML:**
[view](#)

[Activate](#)

Please check the details and press 'Activate' to activate the policy.

6. Check the details are correct
7. Click 'Next'
8. Check you have entered homeowner email address
9. Click 'Activate'

Due Diligence.

You can view and download available documentation here. If this is not available, select Tell me why.

When activating a policy you may get the message below.

No cover available

Cover is not available as a Cover Note has not been issued for this property

[Return to my cases](#) [Back to case](#)

Please note

If you have a cover note, you should receive a email to confirm the certificate has been issued. If you haven't received this after 1 hour of activating, please call Customer Services on 0344 633 1000 who will look at this for you.

Acting as a vendor conveyancer

1. Within 'Cases' tab select case from either 'New cases' or 'Active cases' lists

The screenshot shows the 'Cases' tab with sub-tabs: Referred cases, My cases, Office, Search, and Archive. The 'My cases' sub-tab is active. There are two tables: 'New cases' and 'Active cases'.

Case Ref	Homeowner	Address	Builder	Plot	Policy No
		Site: Top Street, Bawtry, DN10 6	McCarthy & Stone R L Northern	16	AQ112156

Case Ref	Type	Status	Homeowner	Address	Builder	Plot	Policy No
	P	ACTIVE	Ms Christine Snowdon Mr G Snowdon	Site: Caldecotte Lake, Monellan Grove, MK7 8NE	Mccann Homes Ltd	15	AG004608
	P	COMPLE...	Mr Sam King	1a Arcon Avenue KA6 5BT		13	AS047592
	P	ACTIVE	Mr Brian Test Mrs Rosemary Test	TEST MK5 6DD	Cairnpark Properties Ltd	4	AF343344
	P	ACTIVE	Mr test homeowner No Named Contact	321 The Water Gardens SE16 6ff	Taylor Wimpey Central London	321	AE134432

2. Check the details are correct (Yes/No)

3. If the details are correct you can tell us by clicking on the 'Tell us' button

The screenshot shows a form titled 'Are these details correct?'. It contains the following information:

- Policy number: AQ001681
- Plot No: 9
- Site address: Land Adjacent A43/A427, Weldon Park, CORBY, NN17 3JW
- Seller: Persimmon Homes Midlands trading as Persimmon Homes and Charles Church

At the bottom, there are three buttons: 'Return to my cases', 'Something wrong? Tell us' (circled in red), and 'Yes Continue'.

4. If yes – what is your role? Select whether you are acting on behalf of a purchaser or vendor. Click 'Next'

The screenshot shows a form titled 'What is your role?'. It contains the same information as the previous form. At the bottom, there are two radio buttons: 'I am acting on behalf of the purchaser' (unselected) and 'I am acting on behalf of the vendor' (selected). There are also 'Return to my cases' and 'Next' buttons.

Please go to page 28

1. If you are acting on behalf of the builder in owning or selling the property

2. If you are acting on behalf of the homeowner in the sale of their property

The screenshot shows the 'What is your role?' form with the following information:

- Policy number: AN106932
- Plot No: 170
- Site address: Bishops Court Quarry, Apple Lane, EXETER, EX2 7JH
- Seller: Redrow Homes West Country trading as Redrow Homes Ltd

At the bottom, there are two radio buttons: 'I am acting on behalf of the purchaser' (unselected) and 'I am acting on behalf of the vendor' (selected). Below this, there are two radio buttons for role selection:

- acting for the builder in owning or selling this property? (labeled 1)
- acting for the homeowner in their sale of this property? (labeled 2)

At the bottom, there are 'Return to my cases' and 'Next' buttons.

Plot details

Policy number: AQ112156 Plot: 16 Site:Top Street, Bawtry, DONCASTER, DN10 6. McCarthy & Stone R L Northern trading as McCarthy & Stone R L Ltd

Please provide a sales contact email for the builder.

Sales contact:

e.g. sales@salescontactemail.com

Your reference:

1

Property info:

Postcode:

Lookup

2

Please state the intended use of this property:

the vendor intends to sell this property

the vendor intends to rent this property

the vendor is maintaining ownership of this home

3

4

Confirm

1. You can enter your own reference for this case here if you have one

2. To add an address enter the postcode and click the Lookup button

3. Select the intended use of the property from the list:

1. the vendor intends to sell this property

2. the vendor intends to rent this property

3. the vendor is maintaining ownership of this home

4. The click 'Confirm'

you will then see the following pop-up confirming Activation sent to NHBC.

Activation sent for Builder Owned

This has been sent for processing.

No claims can be made under the Buildmark policy whilst the home is owned by the builder. The remainder of cover will available to any subsequent purchaser on the sale of the home.

Return to my cases

1. You can enter you own reference for this case here if you have one
2. The vendor intends to sell this property
3. If selling at auction, tick the box
4. Click 'Next'

Please note
if not selling at auction, proceed straight to point 4

Plot details

Policy number: AQ124451 Plot: Apt 30 Site:Droylston Marina Site 1,2,3, Market Street, Droylsden, MANCHESTER, M43 7. Watkin Jones And Son Ltd

Please provide a sales contact email for the builder.

Sales contact:

Your reference:

Property info:

Postcode:

Please state the intended use of this property:

- the vendor intends to sell this property
- the vendor intends to sell this property at auction
- the vendor intends to rent this property
- the vendor is maintaining ownership of this home

1. Click on the drop down to add a new purchaser
2. Click! Add row!
3. Enter the purchasers details
4. Complete the purchase information
5. Click 'Next' and a pro-forma will be created and sent to the homeowner

Please note
Purchasers conveyancer email and Occupancy type are mandatory fields.
If you add a homeowner with no email address, a pop-up alert will advise you.

Purchaser details

Policy number: AQ124451 Plot: Apt 30 Site:Droylston Marina Site 1,2,3, Market Street, Droylsden, MANCHESTER, M43 7. Watkin Jones And Son Ltd

Your reference:

Purchasers

Please select the purchasers:

Add new purchaser(s) and details:

Title	First name	Last name	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Purchasing organisation:

Purchasers conveyancer email:

Postal address:

Occupancy type:

Exchange date:

Completion date:

Deposit amount:

Purchase price:

IDD documentation for homeowners

As part of the Insurance Distribution Directive (IDD) regulations we are required to supply information to the potential homeowner prior to exchange.

To assist in this process, whenever a homeowner is added with an email address or a correspondence address, they will receive a link to download an IPID (Insurance Product Information Document), policy pro-forma and Buildmark policy document.

You also have the ability within the Conveyancing Portal (in each client's case) to download and send these documents to your client. Under the 'My cases' tab please select the case you want to check

1. Pro-forma will be available to view and download
2. IPID will be available to view and download

Referred cases **My cases** Office Search Archive

Check and Activate Buildmark

Policy number: AM110220 Plot: 49 Site: Millmount, Carrowreagh Road, Dundonald, BELFAST, BT16 1. CONOLLY HOMES LTD

Your reference: null

Seller: CONOLLY HOMES LTD

Purchaser(s) to be added: Miss ds test [Amend](#)

Postal address: bt16 1ef

House type:

Exchange date: [📅](#)

Completion date: [📅](#)

Deposit amount:

Purchase price:

[Save](#)

Due Diligence

- **Pre-comp cover:**
Active from date of exchange [Tell me why](#)
- **Post-comp cover:**
Active from Date of Completion, subject to property finalling [Tell me why](#)
- **Construction state:**
- **NHBC Building Control:**
No
- **Endorsements:**
None
- **Policy documents:**
[view](#)
- **Pro-forma certificate:**
[view](#)
- **CML:**
Not currently available
- **IPID:**
[view](#)

[Download pro-forma pack](#)

[Return to my cases](#) [Activate](#)

Please check the details and press 'Activate' to activate the policy.

If you are working on a case and something is wrong

Select relevant reason from the list

1. Remove Case – you will then be required to enter a reason
2. Transfer to different user – this will transfer case to another colleague in your office
3. The listed seller is incorrect – select correct seller from list, if other is selected please provide the seller in text box provided
4. The plot/site details are incorrect – you will then need to enter correct plot / site details
5. Click 'Next'

Cases **Settings**

My cases Office Add case Archive ?

Something is wrong

Policy number: AQ037793 Plot: 22 Site: Land Adjacent A43/A427, Weldon Park, CORBY, NN17 3JW. Persimmon Homes Midlands trading as Persimmon Homes and Charles Church

Please tell us why:

- Remove case
- Transfer to a different user
- The listed seller is incorrect
- The plot/site details are incorrect

You will be asked for more information after you click next.

Cancel Next

Alerts – information conflict resolution

Select the relevant case from the 'Alerts' section

Update the details and click 'Apply selected'

The screenshot shows a web interface with a dark blue header containing 'Cases' and 'Settings'. Below the header, there are tabs for 'My cases', 'Office', 'Add case', and 'Archive'. The main content area is titled 'Information Conflict Resolution' and includes the text 'Policy number: AM078972 Plot: 12: Site: Great Park Estate Phase 2, London, NW7 6DR.' A warning message states: 'The exchange date has passed and there is no confirmation of exchange of contracts (For example: 31/12/2016) provided by NHBC to activate section 1 cover)'. Below this, there is a form with two fields: 'Please enter the actual date of exchange:' with a text input containing '13/02/2015' and a date picker icon, and 'Please confirm that exchange has taken place:' with an unchecked checkbox. At the bottom of the form are two buttons: 'Cancel' and 'Apply selected'.

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Alerts – referral to NHBC Customer Services

Sometimes a referral will need to be dealt with by NHBC Customer Services.

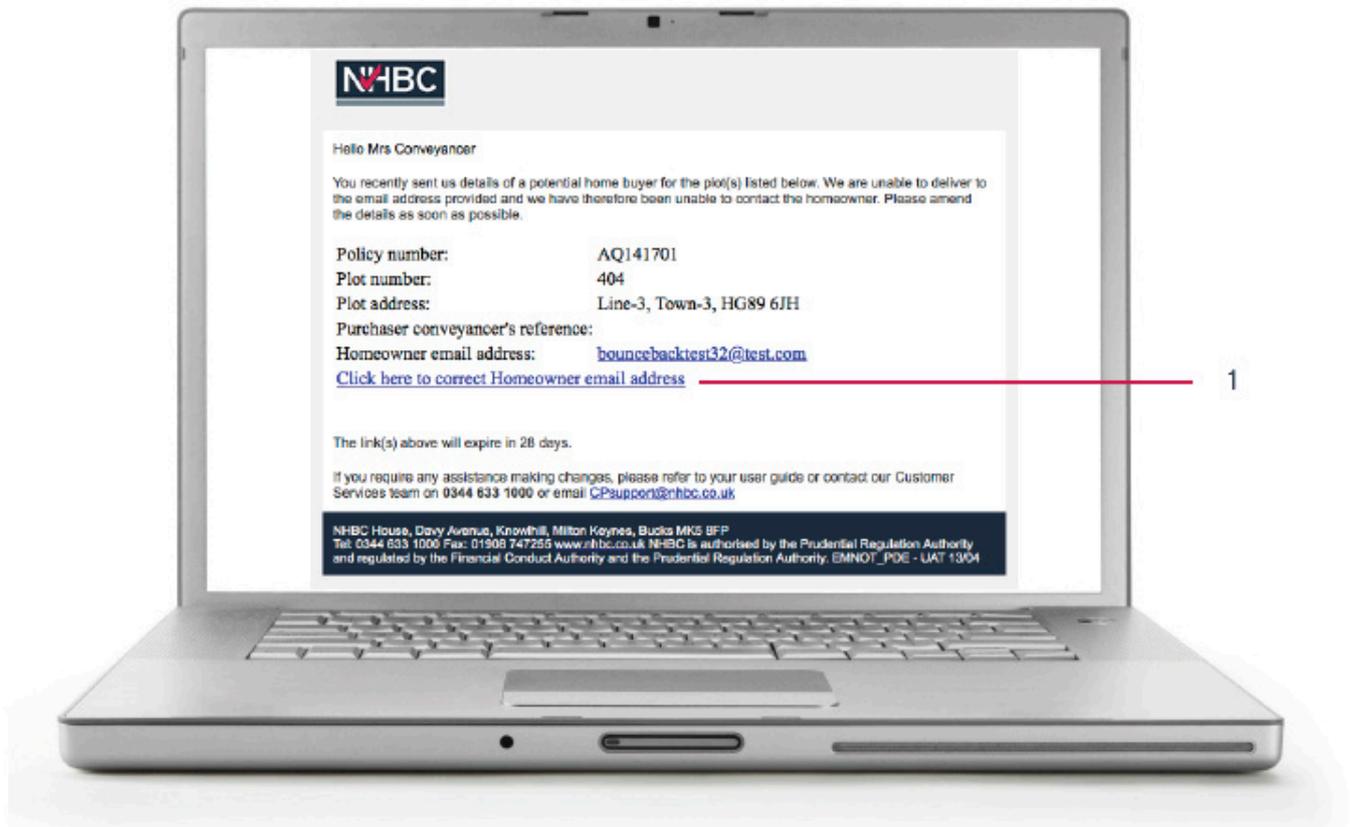
Please provide a contact telephone number in case they need to telephone you to discuss the case.

Once the referral has been cleared it will re-appear on your active cases section.

The screenshot shows a web interface with a dark blue header containing 'Referred cases', 'My cases', 'Office', 'Search', and 'Archive'. The main content area is titled 'Activate Bulldmark' and includes the text 'Referrals' and 'Some conditions have been identified on the case which would require referral to NHBC customer service before policy can be activated. We will contact you within 5 working days. Please click on the 'Activate' button to submit'. At the bottom of the form are two buttons: 'Back' and 'Activate'.

Alerts – invalid email address supplied

If we were unable to deliver to the email address you have provided for a homeowner, this will trigger the below email alert



1. To update the homeowners email address click on the link in the email, this will take you to the NHBC online login page



1. You should use your Conveyancer Portal Username
2. You should use your Conveyancer Portal Password
3. Click 'Sign In' button

Sign out

NHBC Online dsargent@nhbc.co.uk

Information resolution

Policy number: AQ141634 Plot:42 Site: Heathfield Road AYR, KA8 9DR. KEEPMOAT HOMES (SCOTLAND) LTD trading as KEEPMOAT HOMES

Unable to deliver email(s) received after emailing the purchaser's email address
Please review and amend accordingly.

Mr Bounce-4 Test-4

Cancel Update

1

2

1. Update the homeowner email address here
 2. Click the update button
- You will then see the following message confirming the changes have been saved.

Sign out

NHBC Online dsargent@nhbc.co.uk

Information resolution

Action Complete
Your response has been saved.
If you have other email links to click, then you can leave this window open so that you do not have to sign in each time, otherwise please sign out using the link at the top-right of the page.

Alerts - cases that need your attention

Alerts are shown on the 'My cases' tab to remind you of missing information, or policies that have now passed the anticipated dates, but have not been confirmed.

You can click into the alert, and be shown the policies with this alert, as well as update the information to clear the alert.

Cases Settings

My cases Office Add case Archive

Action required! Please review the following cases which need your attention:-

Number of cases	Description
1	No email address has been given for any of the purchasers

Please note

The alert for not providing an email address for the purchaser is a reminder that if you do have one, please add it. This will not affect you activating the policy or stop an insurance certificate being issued.

Talk to us...

If you need further help call our team on **0344 633 1000** and ask for '**Customer Services**' or email **cpsupport@nhbc.co.uk**

If you would like to join our Conveyancer user panel, please email **cpuserpanel@nhbc.co.uk**

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NHBC's registered address is; NHBC House, Davy Avenue, Knowlhill, Milton Keynes, Bucks, MK5 8FP.



Raising Standards. Protecting Homeowners