



Integration Guide

Halifax

Application Types



Decision In Principle (Soft Credit Check)

Customer Types

Supported

PAYE & Self-employed

First Time Buyer

Homemover (inc. Porting)

Remortgage / Unencumbered

Repayment

Interest Only

Part and Part / Split

Schemes i.e., Shared Ownership

Lending into Retirement

Features



Tracking

Case Tracking capabilities are supported with this integration.



Amendments

Lender only initiated Case Amendments post submission are supported with this integration. Alternative Products will not be offered by Halifax via APPLY. Instead, this must be done using Halifax Intermediaries Online.



Documents

Documents will not be sent to the Lender from APPLY. DiP Certificates are available via APPLY



Notes

Two-way messaging between the Broker and the Lender is not supported.



Registration

Halifax requires that you be registered with Halifax Intermediaries before you can submit cases.

New to Halifax

If you have not previously submitted business using Halifax Intermediaries Online, please go to <https://www.halifax-intermediariesonline.co.uk> to register before continuing with the DiP within APPLY.

Intermediaries Online

[Registration Help](#)
[FAQ](#)

Security Guaranteed

If you have used this service before, please enter your security details and click on the 'Continue' button

User ID

Password

[Forgotten password](#)

Continue

Forgotten your memorable information? Please click the Forgotten password link to reset it. If you don't remember your existing User ID or you no longer use the e-mail address associated with your Halifax Intermediaries account please contact the Online Helpdesk on 0345 608 0038 for help restoring access to your account.

If you have NOT used this service before, follow the 2 easy steps below before you can sign in.

Step 1: [Register now](#) - This will only take a few minutes to complete, your details will be passed for authorisation and upon receipt of your confirmation email you can move onto step 2.

Step 2: [First time activation](#) - On receipt of a one time password following an account activation.

If you have received a one time password following a password reset please follow the link below.

[Password reset](#) - Using your one time password.

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Existing Halifax Intermediary Users

When you start a Halifax DiP within APPLY, you will be prompted to input your Halifax **User ID** and **Password**. This will check with Halifax whether you are registered to place business with them.

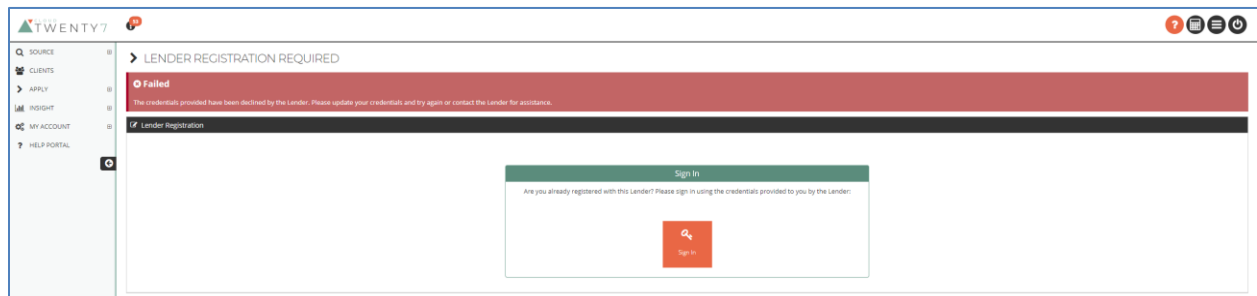
Please note that if you use a User ID/Password that is either incorrect or has not been used for some time, it is advised that you log in to Halifax Intermediaries Online before trying to submit the DiP. Simply go to <https://www.halifax-intermediariesonline.co.uk>, and login before trying to use the same credentials via APPLY.

Opening Hours

Halifax Intermediary Online is available between the following hours:

Monday - Friday : 6:00am - 10:00pm
Saturday : 8:00am - 6:00pm

You will be unable to start a DiP from APPLY outside of the above hours. If you try to sign in outside of these hours, or enter an incorrect **User ID** and **Password** combination, you will be displayed the following error.



Notes

The integration with Halifax allows a Broker to complete all the required information for a Decision In Principle.

> SELECT APPLICATION TYPE APPLY ID: 57010008

Twenty Tec
Leeds BS
RETENTION Mainstream 1 Year Fixed 699 Fee Product Transfer

Information
Your APPLV application has been successfully initialised and pre-populated with your client and mortgage details. Please select from the available application types to begin the application process.

Select the application type

DIP (Data Transfer) **Full Mortgage Application**

Product Details

Lender	Leeds BS
Product Name	RETENTION Mainstream 1 Year Fixed 699 Fee Product Transfer
Lender Product Reference	33362 / 33458
Initial Rate	5.94
Mortgage Class	Fixed
Initial Period	Dec-2023

Mortgage Requirements

Property Price/Value	£ 900,000.00
Loan Amount	£ 300,000.00
Term	25
Mortgage Type	Standard Residential
Mortgage Reason	Purchase
Payment Method	Repayment
Property Address	6 Brinslade Road Ringwood BH24 2NQ United Kingdom

Integration Information

Application Type	Decision In Principle
Integration Type	Pre-ppp Data Transfer
Case Payments	None
Lender Instruction	Ability to complete all the required information to create a Case within the Leeds Intermediary Portal. The DIP decision and DIP Certificate will be available via the Leeds Intermediary Portal.
Lender API Details Info	Available 24 hours a day, 7 days a week

Available Mortgage Reasons and Types

Decision In Principle	
Mortgage Reasons	All Reasons
Mortgage Types	Remortgage, All Mortgage Types

Validation

Form contains errors
This Lender requires additional information for this application before it can be submitted. Please review the form and complete the marked sections below.

Intermediary Information

Mortgage Requirements

Applicant Details

Employment and Income Details

Outgoings

Credit History

Property Details

When editing an Application Form, and all mandatory fields have been populated, clicking 'Validate' in the top right-hand corner will check to ensure that the product is still the correct fit.

If the product does not fit, the Application Form will display information at the top of the form.

DiP Submission

Once you have a validated DiP Form, you can click Submit, and your application will be sent to Halifax, and it will change to a state of Processing.

Please note that you can only submit a DiP once via APPLY. You must not try to submit more than one DiP for a customer. Once the DiP has been submitted and a decision has been provided, you cannot make any further updates or amendments to the DiP from within APPLY. If any subsequent amendments are required, these should be made directly within Halifax Intermediaries Online. Halifax may request a case amendment via APPLY to the DiP in order to provide a decision.

All DiP data submitted via APPLY will be made available within Halifax Intermediaries Online, so no rekeying will be required.

DiP Decision

Once received, Halifax will process the application, and the Case will change to 'Decision' with a status of *Accepted*, *Action Required* or *Declined*.

Accepted

Once the DiP has moved to Decision > Accepted, Brokers will need to go direct to the Halifax Intermediaries Portal (<https://www.halifax-intermediariesonline.co.uk>) to move the DiP to Full Mortgage Application for the Client.

Brokers will be provided with a DiP Certificate within the Case Documents section of the APPLY case.

Action Required

Please note that when Halifax processes the DiP, the Case within APPLY could move to Action Required. This could be because Halifax have set it to a state of Corrective Action Required, Alternative lending proposal or Action Required.

For the scenarios of Corrective Action Required and Alternative Lending Proposal, please go to <https://www.halifax-intermediariesonline.co.uk> to resolve and continue with the application. Once you have resolved any issues within the Halifax Portal, the Case within APPLY will be automatically updated.

Declined

Please note that if your DiP gets Declined, you should NOT create another DiP within APPLY. Instead, please go to <https://www.halifax-intermediariesonline.co.uk> to amend.

Proceed in Portal

When a Case is in Current Status of Proceed in Portal, this means the Case is already being progressed using Halifax Intermediaries Online and therefore, you should NOT try to progress the Case in APPLY.

Withdrawn

Once you have submitted a DiP to Halifax from APPLY, it is not possible to withdraw it. However, you can do this using Halifax Intermediaries Online or by talking to the Halifax Team. This will automatically update the Case Status within APPLY.

Training and Support

Online Training Support

Web based online training via WebEx lasting 30 minutes to 1 hour.

Online Tutorials Coming Soon

Face to Face

Please contact Twenty7Tec on helpdesk@twenty7tec.com or 01202 553457 to book your session.