

MORTGAGE

e-dealing workflow check list

Primary Contact (PC)	
Conveyancing Professional (CP)	
Checklist Author (A)	

e-dealing No.	
Client	
File reference	
Settlement date	
Prior Manual Dealing No.	

1. Dealing details

Registered Proprietor.....
 Title Reference(s).....
 Mortgagee.....
 Memorandum Number..... Priority Amount.....
 A/CP signature..... Date.....

2. Sign e-dealing

PC	A/CP	
<input type="checkbox"/>	<input type="checkbox"/>	Title references, Mortgagor name and, Mortgagee details have all been confirmed against the documentation and search records
<input type="checkbox"/>	<input type="checkbox"/>	A&I forms completed - alternate Conveyancing Professional specified if required
<input type="checkbox"/>	<input type="checkbox"/>	e-dealing details are correct including Memorandum Number for Mortgage / Priority Amount - as appropriate
<input type="checkbox"/>	<input type="checkbox"/>	Instruments have been Pre-Validated (<input type="checkbox"/> <input type="checkbox"/> Failure due to prior manual dealing)

PC Checklist of attached documentation for CP - where appropriate:

- | | |
|--|--|
| <input type="checkbox"/> Current Guaranteed Search Note | <input type="checkbox"/> Mortgage form with Memorandum No. |
| <input type="checkbox"/> Print of the draft Mortgage | <input type="checkbox"/> Caveator's consent |
| <input type="checkbox"/> Institutions letter of Instructions | <input type="checkbox"/> A&I (Mortgage) with photo id |

PC signature Date.....

The e-dealing is signed and is ready to Release - CP signature Date.....

3. Release documents

A/CP

- A Guaranteed Search has been obtained if required
- The e-dealing has been Pre-Validated - (Failure due to prior manual dealing)
- The e-dealing should be submitted regardless of any prior manual dealing

The e-dealing is ready for Release and Submit - A/CP signature Date.....

4. Completion of e-dealing

PC

- The mortgage has been released PC signature Date.....
- The e-dealing has been submitted
- Notice of registration and all supporting documentation are held on file

The e-dealing has registered - PC signature Date.....