



Help to Buy: ISA Scheme

Portal User Guide



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Contents

Introduction	3
Before you submit a bonus request	4
Technical Help:.....	5
Supported browsers:.....	5
Supported Resolution:	5
Tool tips	5
Glossary	6
Logging onto the Conveyancer Portal	7
Registering on the Portal	8
Submitting a Bonus Request	13
Option to save a Bonus Request or Return Request	16
Bonus Request:	17
Viewing a Bonus Request.....	17
Editing a Bonus	20
Returning a Bonus (Full and Partial).....	21
Cancelling a Bonus Request.	24
Confirming your bonus.	24
Submitting Title Documents.....	26
Contacting the Provider of the Scheme.....	27
Frequently Asked Questions	27



.....	27
I cannot remember my password, what do I do?	27
I am the administrator for my firm ... what does this mean?	27
How do I manage different users within my firm?	28
How do I invite other colleagues to use the Portal?	28
How do I change a user status?	30
Who is my responsible conveyancer?	31
What is my conveyancer identification number?	31
The portal does not recognize the postcode located in a London Borough - why?	31
Why has my bonus application been referred?	31
How do I track what documents have been already been uploaded?	32
The exchange and completion are taking place on the same day, what is the process for claiming a bonus?	33
The purchase is now complete – what do I do now?	33

Introduction

Help to Buy: ISA Conveyancer Portal

Conveyancers wishing to request a HtB: ISA Bonus will need to register with the Scheme Provider via the Conveyancer Portal.

<https://www.helptobuyportal.org.uk/>

[Ctrl and Click to follow link]

Once a Firm has registered, the portal facilitates:

- Management and administration of firm users
- Bonus request submission
- Bonus status tracking
- Return of a bonus
- Property completion confirmation and title document submission.
- Scheme Provider contact

Before you submit a bonus request

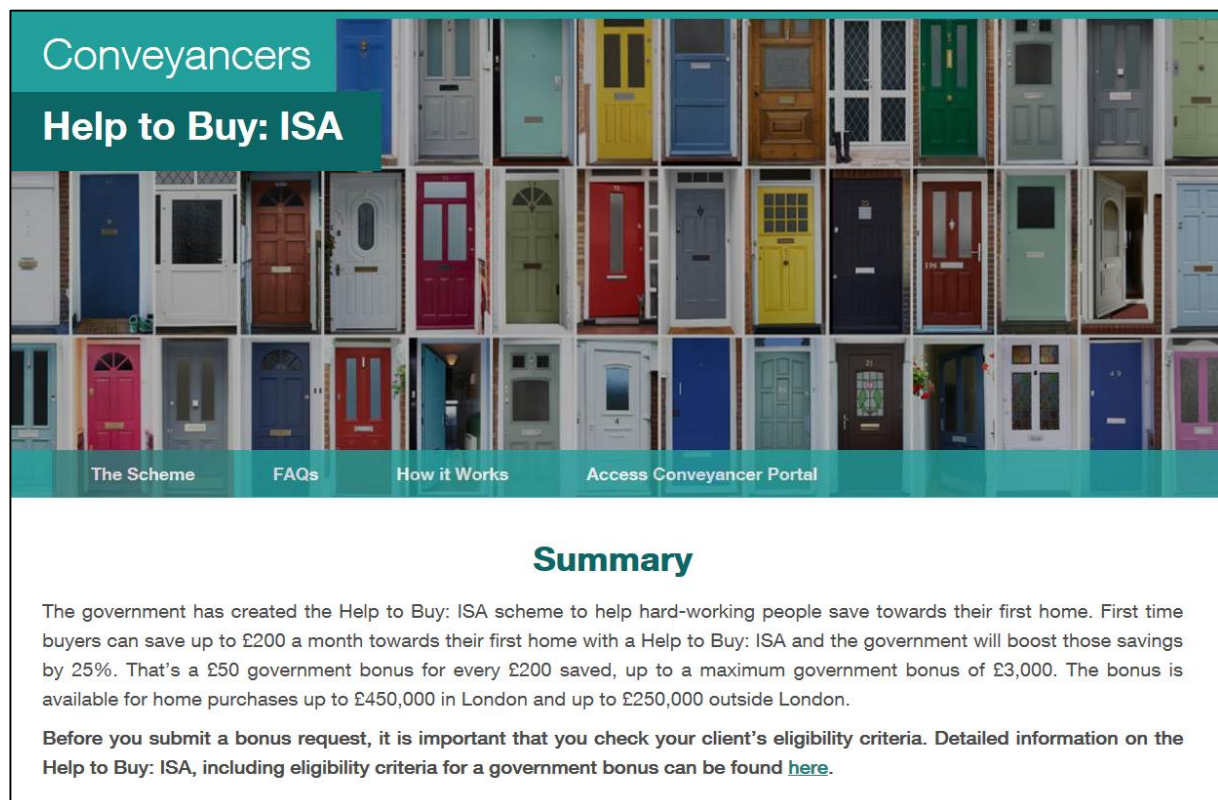
It is important that you check your client's eligibility criteria.

In order to be eligible for a Government bonus your client needs to be on the title deed of the property and the property must be purchased with the assistance of a mortgage. Under the Help to Buy: ISA Scheme Rules, an individual does not need to be named on the mortgage of the property, however their lender may require all individuals named on the title deed to also be named on the mortgage.

Detailed information on the Help to Buy: ISA, including eligibility criteria for a Government bonus can be found by clicking on the link below.

[Help to Buy Conveyancer Portal](#)

For full details of the scheme please refer to the Conveyancer Guidelines, Scheme Rules and Conveyancer Adherence Agreement which are available on our website or by clicking on 'Help' on the Conveyancer Portal.



Conveyancers
Help to Buy: ISA

The Scheme FAQs How it Works Access Conveyancer Portal

Summary

The government has created the Help to Buy: ISA scheme to help hard-working people save towards their first home. First time buyers can save up to £200 a month towards their first home with a Help to Buy: ISA and the government will boost those savings by 25%. That's a £50 government bonus for every £200 saved, up to a maximum government bonus of £3,000. The bonus is available for home purchases up to £450,000 in London and up to £250,000 outside London.

Before you submit a bonus request, it is important that you check your client's eligibility criteria. Detailed information on the Help to Buy: ISA, including eligibility criteria for a government bonus can be found [here](#).

Additional information can be found in the following documents available on the Portal

[Scheme Rules](#)

[Conveyancer Guidelines](#)

[Conveyancer Adherence
Agreement](#)

Technical Help:

This document aims to provide guidance on using the Help to Buy: ISA Conveyancer portal only.

Supported browsers:

- Microsoft Edge 12+
- Google Chrome 38+
- Mozilla Firefox 4+
- Apple Safari 5+
- Opera 27+

You will need to upgrade your browser to the current version.

Supported Resolution:

- Minimum resolution of 1024 x 768 is recommended
- Please ensure that the zoom level on your computer screen is set to 100%

Tool tips

To support you through using the portal there are a number of helpful hints and tips:

- (*****) Indicates a mandatory field.
- To identify what information is required in each of the fields, hover over the (*****) and 'tool tips' will appear.

Glossary

“Responsible Conveyancer” means the full name of a licensed conveyancer or practicing solicitor who is eligible to submit bonus requests. The named individual will be accountable for this bonus request.

“Portal Administrator” means the individual person within each branch of the Firm that has overall responsibility for maintaining the profile of that branch and the users within that branch – for registration details **please see Page 7**, registration scenarios.

“Bonus”, is the amount calculated in accordance with the *Scheme Rules*, to be paid to the *Client Account* of an *Eligible Conveyancer* for a *Help to Buy: ISA Holder* who is, or will be, a *First Time Buyer* (as **“First Time Buyer”** is defined in the *Scheme Rules*).

“Client Account” means an account of an *Eligible Conveyancer* kept with a bank or building society for holding client money, and which is operated by such *Eligible Conveyancer* in accordance with the regulations, rules or guidelines of its applicable regulator.

“Closing Balance” means:

(A) the closing balance of a *Help to Buy: ISA*; or

(B) where the closing balance of a *Help to Buy: ISA* is zero, the balance of the *Help to Buy: ISA* immediately before the last withdrawal of remaining funds held in that *Help to Buy: ISA*, prior to the *Help to Buy: ISA* being closed, as shown in the *Closing Documents* for that *Help to Buy: ISA*.

“Closing Documents” means the *Closing Statement* and any letter or other document provided with the *Closing Statement* by an *ISA Manager*, and containing the information and confirmations listed in Schedule 3 of the *Scheme Rules*, in each case in a form capable of being copied, reproduced and shared in electronic format.

“Closing Statement” means a statement, provided on the letterhead or branded stationery of an *ISA Manager*, in respect of a *Help to Buy: ISA*, in a form capable of being copied, reproduced and shared in electronic format.

“Conveyancer Adherence Agreement” means the conveyancer adherence agreement in the form set out in Schedule 8 of the *Scheme Rules*.

“Conveyancer Guidelines” means the guidelines for *Eligible Conveyancers* relating to the participation by *Eligible Conveyancers* in the *Help to Buy: ISA Scheme*, including in particular relating to the processes to be undertaken by an *Eligible Conveyancer* when making a claim for a *Bonus*, as published, amended and supplemented from time to time by the Scheme Provider.

‘Requestor Name’ means the name of the individual making the bonus request submission.

Logging onto the Conveyancer Portal

To log in please click here: [Help to Buy Conveyancer Portal](#).

Please note the key information highlighted below:

[Home](#)[Help](#)

Sign in

Email Address

Password [Forgot your password?](#)

[Sign in](#)

If your firm has not previously registered on the Help to Buy ISA Portal, please click here : [Register](#)

If you have received an email from your firm administrator inviting you to create an account, please follow the instructions within the email to set up your account. You will then be able to log on from this page.

Important Message

- The Help to Buy: ISA bonus must be claimed on your client's behalf before the completion date.
- The bonus must be included with the completion monies when the completion of the property transaction takes place.
- A bonus cannot be claimed after completion has taken place.

[Site Map](#)[Cookie Policy](#)[Privacy Policy](#)

Registering on the Portal

The first person to register on the portal will become the **administrator** for the location. Once registered, additional users can be created by the administrator. You can also create additional administrators for your location.

There are four possible scenarios for the registration:

Scenario 1	Your Firm is a member of Lender Exchange and a Help to Buy: ISA Scheme member When registering for the Portal it is important to note that registration is linked to your Help to Buy Panel number. For example: your Firm has several branches each with an individual Help to Buy panel number - the individual that registers that location will be the portal administrator for that location and can see all bonus requests linked to that panel number only. If your firm has several locations but one Help to Buy panel number, the administrator will be able to view all bonus requests for all locations. You will be required to enter your Lender Exchange ID and other information which will be verified with Lender Exchange. (see hints and tips below)
Scenario 2	Your Firm is not a member of Lender Exchange but would like to join. If you wish to join Lender Exchange you will be directed to their website.
Scenario 3	Your Firm is a member of Lender Exchange but not a member of the Help to Buy: ISA Scheme. If you are a member of Lender Exchange but NOT a member of the Help to Buy: ISA Scheme you will be directed to the Lender Exchange website to complete further details.
Scenario 4	Your Firm is not a member of Lender Exchange and does not wish to join. If your Firm is not a member of Lender Exchange and does not wish to join, you will be asked to provide additional information and undertake a manual assurance process. The Scheme Provider will undertake a number of checks and will then confirm assurance of your firm for a period of 90 days subject to the results of the checks. Please allow a minimum of 12 business days prior to the expected completion of your clients house purchase for this process to be undertaken and the bonus payment made.

To start the registration process please follow the steps below:

- **Step 1**

Log on to www.helptobuyportal.org.uk and select **Register Conveyancer Firm for Portal**.

- **Step 2**

To begin your registration please complete all the questions and you will be guided through the registration process

Conveyancer Firm Portal Registration

This step will create an administrator account. The first person to register on the portal will become the administrator for the firm. Once registered, additional users can be created by the administrator.

Is your firm a member of Lender Exchange?	<input type="radio"/> No <input checked="" type="radio"/> Yes
Is your firm a Help to Buy: ISA Scheme member?	<input type="radio"/> No <input checked="" type="radio"/> Yes

Next

- **Step 3**

You will be directed to the appropriate registration page.

* denotes a mandatory field.
Please only use business email addresses. Do not use personal email address such as @gmail.com or @live.com.

Lender Exchange Details

Lender Exchange ID *	Help to Buy: ISA Scheme Number *
<input type="text"/>	<input type="text"/>
Regulatory Body ID	PII Policy Number *
<input type="text"/>	<input type="text"/>

Contact Details

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Contact Email Address *	Confirm E-mail *
<input type="text"/>	<input type="text"/>
Contact Telephone Number *	
<input type="text"/>	

- **Step 4**

You will be required to confirm your acceptance of the Conveyancer Adherence Agreement.

- **Step 5**

To complete your registration, click on submit. You will then receive an email to the address you stated with an invitation code to complete your registration.

Please note this link is valid for **96 hours**.

- **Step 6**


When you have clicked on this link you will be asked to set a password



Lender Exchange:

To find your details in Lender Exchange that you need to enter on the Conveyancer Portal a 'help' guide is available. Please log onto Lender Exchange, select 'Mortgage Documents' and select 'Locating Lender Exchange Details for HtB: ISA Portal'.

NB When submitting your Lender Exchange details onto the portal please ensure your phone number is in the correct format – 012345678901 – **do not** include the international dialing code.



Mortgage Documents | Contact Us | Help | Log Out | My Account (HTBbdenton)

Description	Date Uploaded	Action
Scheme Rules 26.10.15	01/03/2016	View Replace Delete
Locating Lender Exchange Details for HtB: ISA Portal	13/05/2016	View Replace Delete
Purchase Failure Notice	14/07/2016	View Replace Delete
HtB: ISA Portal Tips	18/07/2016	View Replace Delete
First Time Buyer Declaration	04/01/2017	View Replace Delete
Change Note - Barclays Bank Statement	21/02/2017	View Replace Delete
Portal User Guide 2017	13/04/2017	View Replace Delete
Change Note - Individual Regulated Assignment	18/04/2017	View Replace Delete
Help to Buy ISA Conveyancer Factsheet - Law Society	03/08/2017	View Replace Delete
Conveyancer Guidelines (NEW Aug 2017)	24/08/2017	View Replace Delete

Password tips:

Passwords **must** include at least one numeric (0-9), one lowercase ('a'-'z') and one uppercase ('A'-'Z') character. Passwords **must** consist of at least 8 characters. **Please keep your password secure – never share your password with anyone. It is important not to allow anyone else to log in using your details.**

You can change your password at any time by selecting change password under the profile section.

Profile

Profile

Conveyancer Management

Conveyancer Users

Security

Change Password

Change Email

Your Information

First Name *


Last

Phone Number

Firm Name *

Password Reset

If you have forgotten your password, click on the 'Forgot your Password' button on the Conveyancer Portal Login page.



Backed by
HM Government

Home

Sign in

Email Address

Forgot your password?

Password

Sign in

If your firm has not previously registered on the Help to Buy ISA Portal, please click here : [Register](#)

If you have received an email from your firm administrator inviting you to create an account, please follow the instructions within the email to set up your account. You will then be able to log on from this page.

You will need to enter your registered email address and click 'Send Verification Code'.

Home

Forgot your password?

Email Address

Email Address

Send verification code

Continue

Please then check your email inbox for an email containing a verification code.

Verify your email address

Thanks for verifying your account!

Your code is:

Sincerely,
Help to Buy Conveyancer Portal

Tip: Please check your Junk/Spam mailboxes.

Enter the verification code and click 'Verify Code'. Once verified, click 'Continue' and enter a new password.

Forgot your password?

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

Verification code

Verification code

Verify code

Send new code

Continue

Please note: The verification codes expire after 10 minutes. If you need a new code, please click 'Send new code'.

Submitting a Bonus Request

- **Step 1**

Before you submit a bonus request, it is important that you check your client's eligibility criteria.

Detailed information on the Help to Buy: ISA, including eligibility criteria for a Government bonus can be found on the Help to Buy website.

For full details of the scheme please refer to the Conveyancer Guidelines, Scheme Rules and Conveyancer Adherence Agreement available on the portal or via the link on Page 4 of this document.

- **Step 2**

Ensure you have the following information:

- ✓ Your bank account number and sort code
- ✓ ISA Holder's Details
- ✓ Property Details
- ✓ Supporting Documents – ISA Closing Statement and First Time Buyer Declaration
These documents must be .JPG, PNG or PDF attachments only.

- **Step 3**

Log onto the Conveyancer Portal via www.helptobuyportal.org.uk and select 'Submit Bonus Request'. Please note you can save a bonus request and return to make amendments before final submission.

The screenshot shows the 'Submit Bonus Request' page on the Conveyancer Portal. The top navigation bar is dark teal with links: Home, Submit Bonus Request (highlighted with a red box), View Bonus Requests, View Bonus Returns, Contact Us, and Help. Below the navigation bar is a breadcrumb trail: Home / Bonus Requests / Submit/Save a new Bonus Request. The main heading is 'Submit/Save a new Bonus Request'. Below this is a disclaimer: 'Individual registered conveyancers are responsible for the accuracy of the information in this application. The Help to Buy: ISA Bonus must contribute towards the funds consolidated at the completion of the property transaction.' A yellow box contains instructions: '* denotes a mandatory field for submitting a bonus request. Enter dates as DD/MM/YYYY or use the date picker next to the field. Monetary fields cannot contain £ or commas and can include up to two decimals representing pence.' Below this is a section titled 'Lender Exchange Details' with an 'Edit' button. The section contains the text: 'The information about your organisation enables the assurance of the request by matching to the Lender Exchange service.' At the bottom, there are two input fields: 'Lender Exchange ID*' and 'PII Policy Number*'. The page is framed by a blue border.

- **Step 4**

You are required to submit a copy of the **ISA Closing Statement** and a completed and signed **First Time Buyer Declaration**.

In the event that a Bonus Request needs to be processed urgently and the formal ISA Closing Statement is not available, the Help to Buy: ISA Holder can use an up-to-date interim statement. This must detail their current balance, name, account number and product name. The statement may take the form of an online banking printout, or could be obtained directly from the Eligible ISA Manager.

You will need to select 'Yes' in the 'Supporting Documents' section on the Bonus Request form to indicate you have attached an Interim statement.

When the standard Closing Document becomes available, this should be submitted to us at a later date.

- **Step 5**

Please ensure you have entered a date the payment you require is to be made. This **must** be before property completion.

You will need to click to confirm you accept the LISA Declaration every time you submit a Bonus Request.

- **Step 6**

The Scheme Provider will review your submission and will refer back to you if there is any omission of errors in the application. You can also view the status of the Bonus request and any action required on the Portal.

- **Step 7**

Once submitted you will receive an email notification including a **bonus reference which must be quoted in all correspondence**. (For example B200012345)



- You can upload the closing document when the status of the bonus is 'Approved', 'Paid' and 'Purchase Confirmed' only. **Please note you cannot upload the closing document when the status of the bonus is 'Scheduled' or 'In Progress'.**

Responsible Conveyancer Information:

- This is the licensed conveyancer or practicing solicitor who is eligible to submit bonus requests. The named individual will be accountable for this bonus request.
- The Conveyancer Identification Number is the Conveyancer's regulatory body ID.

Requestor Information

- The Requestor is the person who is making the bonus request submission.

Responsible Conveyancer Information

☐ Please confirm this is the full name of a licensed conveyancer or practising solicitor who is eligible to submit bonus requests. The named individual will be responsible for this bonus request. *

Responsible Conveyancer Full Name*	Responsible Conveyancer Identification Number*
<input type="text"/>	<input type="text"/>

Re

The 'Responsible Conveyancer' is the conveyancer in the firm who will take responsibility for the 'Requestor' and for the bonus request should any issues arise

Responsible Conveyancer Information

☐ Please confirm this is the full name of a licensed conveyancer or practising solicitor who is eligible to submit bonus requests. The named individual will be responsible for this bonus request. *

Responsible Conveyancer Full Name*	Responsible Conveyancer Identification Number*
<input type="text"/>	<input type="text"/>

Requestor Name*

<input type="text"/>	<div>The 'Requestor' is the person who is completing the bonus request on the HtB: ISA portal</div>
----------------------	---

Option to save a Bonus Request or Return Request

You can save a Bonus Request or Return Request without being forced to submit, by clicking on the 'Save' button.

Responsible Conveyancer Information

☐ Please confirm this is the full name of a licensed conveyancer or practising solicitor who is eligible to submit bonus requests. The named individual will be responsible for this bonus request. *

Responsible Conveyancer Full Name *

Responsible Conveyancer Identification Number *

Requestor Name *

Supporting Documents

If the ISA account closing document is an Interim document please select 'Yes'

In the event of an urgent submission, where the Closing Documents are not available, your client can use an up-to-date account statement.

No

ISA Account Closing Statement (maximum file size 2Mb) *

Browse...

.JPG, .PNG & PDF attachments Only

First Time Buyer Declaration (maximum file size 2Mb) *

Browse...

.JPG, .PNG & PDF attachments Only

☐ First Time Buyer Declaration (Completed and Signed):

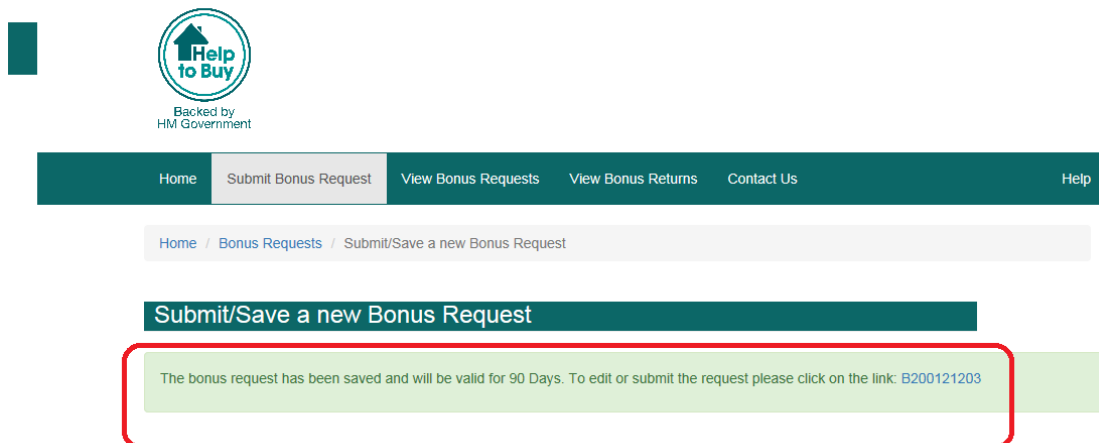
1. I confirm that the Help to Buy: ISA Holder is purchasing an Eligible Interest in Land.
2. I confirm that the entire amount of the Bonus, along with any accrued interest, will be applied towards the acquisition of the property at completion.
3. I have submitted this request in accordance with and have complied with the HM Treasury Help to Buy: ISA scheme rules.
4. I confirm that I am submitting this bonus request as, or on behalf of, the individual registered conveyancer.

☐ I can confirm that at the time of requesting this HtB: ISA Bonus a Lifetime ISA (LISA) first property bonus has not been claimed by my client.

Save

Submit

Bonus Request:



- In the case of a Bonus Request, you must populate the ISA Account Holders National Insurance Number, First Name and Last Name. You must also complete the reCAPTCHA checkbox at the end of the form before being able to save.
- All the Bonus or Return Requests saved prior to submission should be visible in 'View Bonus Request' and 'View Bonus Return' page in status as 'Draft'.
- When saving a Bonus or Return Request in 'Draft' status, the request will be saved for a maximum of 90 days, after which, the request will be automatically cancelled by the system and a new request will need to be raised.

Viewing a Bonus Request

You can view your bonus request at any time to track the progress of your submission.

- **Step 1**
Log onto the Conveyancer Portal.
- **Step 2**
Select the 'View Bonus Requests' Tab – the status column shows the progress of your Bonus.



The definitions of the status of bonus requests are detailed below:

- **Approved** – The Bonus request has been approved and will be paid in line with the Scheme Rules.
- **Cancelled** – The Bonus request has been cancelled by your Firm.
- **Conveyancer Action Required** - The Scheme Provider has referred the Bonus for further information. The action required will be detailed in the Bonus page at the top of the screen, highlighted in red.
- **Draft** – A Bonus request has been saved but not yet submitted.
- **Paid** – The Bonus has been paid.
- **In Progress** – The Bonus request has been submitted to the Scheme Provider and is being processed in line with the Scheme Rules
- **Purchase confirmed** – Your Firm has confirmed the purchase is complete and is ready to submit completion documents.
- **Rejected** – The bonus has been rejected, you will be able to view the rejection reason on the portal.
- **Scheduled** – The bonus request has been scheduled for payment as per the date entered.

You can identify records that have and have not had supporting documents uploaded. In the view Bonus Request page a column has been added named 'Document Upload Status', this will show any outstanding documents.

Home / Bonus Requests									
Bonus Requests									
All Search New Bonus Request									
ID	First Name	Last Name	ISA Account Number	Bonus Amount	Pay Date	Created On	Status	Document Upload Status	Conveyancer Contact
				£1,250.00	6/11/2017	6/11/2017 10:43 AM	In Progress	Please upload the Property Title Document when available	

In the 'View Bonus Request or View Bonus Returns window you can identify those bonuses/ returns that have not yet been submitted.

Bonus Returns:

Home Submit Bonus Request View Bonus Requests View Bonus Returns Contact Us Help									
Home / Bonus Returns									
<h2>Bonus Returns</h2>									
<div>All Bonus Returns ▾</div> <div>Search <input type="text"/></div>									
ID	Bonus ID	Conveyancer	Bonus Amount	Interest	Total Amount to Return	Amount Received	Amount Outstanding	Status	Created On ↑
			£1,375.00	£0.00	£1,375.00			Draft	5/3/2018 ▾
			£500.00	£0.00	£500.00			Cancelled	19/2/2018 ▾
			£713.83	£0.00	£713.83			Awaiting Return	19/2/2018 ▾
			£0.00	£0.00	£0.00			Cancelled	19/2/2018 ▾

Once a draft bonus/ draft return request has been created, you will receive an email confirmation and you will then have 90 days to submit a completed request, after that date the draft request will be automatically deleted.

You will receive an initial email containing your reference and you will then receive 3 subsequent reminders.

Editing a Bonus

If you need to make an amendment to your bonus request

- **Step 1**
Log onto the Conveyancer Portal.
- **Step 2**
Select the 'View Bonus Requests' Tab – the status column shows the progress of your Bonus.
- **Step 3**
Select the appropriate bonus reference.
- **Step 4**
Make the required changes and click on 'submit bonus'.

Returning a Bonus (Full and Partial)

If a bonus needs to be returned to the Scheme Administrator, a Full Bonus Return can be raised on the Portal. If part of a Bonus needs to be returned, then a Partial Bonus Return can be raised. Multiple Partial Returns can be raised for the same Bonus where necessary.

- **Step 1**
Log onto the Conveyancer Portal.
- **Step 2**
Select the 'View Bonus Requests' Tab, the status column shows the progress of your Bonus.
- **Step 3**
Select the drop down menu at the right hand side of the bonus reference you wish to return (see screen shot below).

Home

Submit Bonus Request

View Bonus Requests

View Bonus Returns

Contact Us

Help

Home / Bonus Requests

Bonus Requests

All ▾

Search

Q

New Bonus Request

ID	First Name	Last Name	ISA Account Number	Bonus Amount	Pay Date	Created On	Portal Status	Document Upload Status	Conveyancer Contact
				£2,966.07	30/08/2022	24/08/2022 4:54 PM	Paid		
				£1,583.94	06/09/2022	30/08/2022 3:25 PM	In Progress		

- **Step 4**
Click on 'Return Bonus' to return the full bonus amount, or click on 'Return Partial Bonus' to return a partial bonus amount. Please note a bonus can only be returned once it has been paid.
- **Step 5**
Once you have selected 'Return Bonus' or 'Return Partial Bonus' you will receive an email detailing the next steps.

If you are returning the full Bonus due to a failed purchase, you will need to complete the 'Purchase Failure Notice' which should be provided to your client to support them in re-opening their ISA account and requesting a bonus payment in the future. The Purchase Failure Notice is available on Page 31 of the Conveyancer Guidelines.

If you are returning a Partial Bonus, you will need to enter the amount of the Bonus you wish to return in the 'Bonus Amount (£)' field under the header 'Details of bonus being returned' as highlighted below.

* denotes a mandatory field.
Interest to be repaid cannot contain £ or commas and can include up to two decimals representing pence.

Details of bonus being returned:

Bonus ID

Bonus Amount (£)

Refund Type
Partial ▼

Responsible Conveyancer Information

☐ Please confirm this is the full name of a licensed conveyancer or practising solicitor who is eligible to submit bonus returns. The named individual will be responsible for the return of the bonus. *

Responsible Conveyancer Full Name *

Responsible Conveyancer Identification Number *

Requestor Name *



- Some of the fields will be automatically populated when you select the relevant bonus.
- If the interest accrued is over £10.00 please complete this field and submit the form.
- You have 10 business days to return the funds. The 'Return Due By' date will be completed by the portal.
- The account details where the funds are to be returned are detailed at the bottom of the form.

Details of bonus being returned:

Bonus ID

Bonus Amount (£) *

ID of bonus to be returned.

550.00

Amount to be returned:

Interest to be Repaid (£)

0.00

Total Amount to return (£)

550

Please use the details below to return the bonus:

Date Invoice Raised

Return Due By

7

:

Payee Account Name

Payee Sort Code

Payee Bank Account Number

Cancel Refund

The definitions of the status of bonus returns are detailed below:

- **Accepted** – the return has been created and submitted
- **Awaiting Return** – The Scheme Provider is awaiting payment of the return – the Return request cannot be amended at this point
- **Cancelled** – the payment return has been cancelled by your Firm or by the Scheme Provider
- **Draft** – the return has not yet been submitted
- **Returned** – the payment return has been received

Cancelling a Bonus Request.

If you need to cancel your Bonus Request please follow the steps below:

- **Step 1**
Log onto the Conveyancer Portal.
- **Step 2**
Select the 'View Bonus Requests' Tab.
- **Step 3**
Select the appropriate Bonus.
- **Step 4**
Select 'Cancel Bonus Request'.

Confirming your bonus.

Once your client has completed their purchase you should confirm this by:

- **Step 1**
Log onto the Conveyancer Portal.
- **Step 2**
Select the 'View Bonus Requests' Tab.
- **Step 3**
Select the appropriate bonus.
- **Step 4**
Complete the Purchase Completion Date, click on the declaration and press 'Confirm Purchase'.

The screenshot shows a web form titled "Property Details" with a teal header. The form is divided into two columns. The left column contains fields for "Purchase Price" (232000.00), "Purchase Completion Date" (circled in blue), "Property Address 2", "Property Postal Code", "Expected Date of property exchange" (20/06/2017), and "Expected Completion Date" (30/06/2017). The right column contains fields for "Plot Number", "Property Address 1" (14 Linden Road), "Property Town/ City" (Ashford), and "Expected Completion Date" (30/06/2017). Below the form, there are two file upload sections: "ISA Account Closing Statement (maximum file size 2Mb)" and "First Time Buyer Declaration (maximum file size 2Mb)", both with "Browse" buttons. Below these is a "Declaration" checkbox (circled in red) with the text: "I confirm that the property acquisition has been completed and, that the entirety of the Bonus amount received has been applied towards the acquisition of the property, detailed on the Bonus Request." At the bottom right, there are two buttons: "Submit ISA Closing Document" and "Confirm Purchase" (circled in blue).

Property Details

Purchase Price: 232000.00

Plot Number:

Purchase Completion Date *

Property Address 1: 14 Linden Road

Property Address 2:

Property Town/ City: Ashford

Property Postal Code:

Expected Date of property exchange: 20/06/2017

Expected Completion Date: 30/06/2017

ISA Account Closing Statement (maximum file size 2Mb)

Browse

.JPG, .PNG & PDF attachments Only

First Time Buyer Declaration (maximum file size 2Mb)

Browse

.JPG, .PNG & PDF attachments Only

☐ Declaration:

I confirm that the property acquisition has been completed and, that the entirety of the Bonus amount received has been applied towards the acquisition of the property, detailed on the Bonus Request.

Submit ISA Closing Document

Confirm Purchase

- **Step 5**

You will receive a notification on the portal to confirm completion.

Submitting Title Documents

You are required to submit one of the documents detailed below, depending on the location of the residential property, within 10 business days of these becoming available to you.

Property Postal Code

Date of property exchange *

Expected Completion Date *

Please Review

Property Title
Please upload one of the following documents depending on the location of the residential property owner (maximum file size 2Mb):

- Land Registry Title (England or Wales)
- Title Sheet & Cadastral Map (Scotland)
- Land Registry Folio (Northern Ireland)

Browse...

.JPG, .PNG & PDF attachments Only

Revert to Paid

Submit Property Title Document

Please note the maximum file size 2Mb

- Land Registry Title (England or Wales) confirming property address, name of purchaser, purchase price and registered charge date.
- Cadastral Map (Scotland) and sections A1, B1, C1 of the Title Document.
- Land Registry Folio (Northern Ireland)

Once the purchase completion date has been confirmed, the first time buyer declaration, the closing document and the title documents have been submitted, both the 'Status' and 'Document Upload Status' columns will show 'Completed'. At this point, the bonus request process is finalized.

If, once you have confirmed purchase, you need to return the bonus you will need to select 'Revert to Paid' to enable any returns to be made.

Contacting the Provider of the Scheme

If you wish to contact the Scheme Provider you can do this via the 'Contact Us' tab on the portal or by clicking [here](#).

Select the reason for the contact from the drop down list and complete the detail of your query. Please complete the 'Expected Completion Date'.

Contact Us

* denotes a mandatory field.

What can we help you with? *

Existing Bonus Request ▼

Existing Bonus Request

Returned Bonus

Conveyancer Complaint

Expedited Bonus Request

Technical

Scheme Rules Clarifications

Bonus Completion Letter

Conveyancer ISA Guidelines

General Query

Description *

The Scheme Provider will respond to your query and you will receive an email acknowledgment including a case reference number for you to quote on correspondence.

Frequently Asked Questions



As well as the FAQs available on our website. Below are answers to some common questions:

I cannot remember my password, what do I do?

You will need to click on the 'Forgot your Password' link on the Portal, enter your email address and you will then be sent an email with a verification code. To reset your password, you will need to enter the verification code on the portal and choose a new password.

I am the administrator for my firm ... what does this mean?

The role of the portal administrator(s) within your firm is to manage all users within the portal for your office.

As the administrator for your office you can:-

- invite additional users.
- resend an invitation to a user after invitation expiration.
- deactivate accounts.
- reactivate accounts.
- manage and update your contact details.
- manage access to the portal via the 'Conveyancer Management' Option.
- view all registered users.

I am set as the Administrator for the Portal, can I change this? Can there be more than one Administrator?

The individual that initially registered the firm on the Portal will automatically be set as the Administrator. If you would like to add further Administrators you can. The Portal allows for five Administrators per registered office but in order to add a new Administrator, they firstly need to be a user on the Portal. If they are not a registered user on the Portal, you will need to add them. As the Administrator, you are then able to manage any existing registered users within your firm.

How do I manage different users within my firm?

Only the Portal Administrator can manage user access for your firm. The Portal Administrator can manage user access, re-submit user invitations, reactivate or deactivate users and also convert a standard user to an Administrator. To do this, you will need to go to the profile section of the Portal by selecting the drop down box in the top, right hand corner of your screen and select 'Conveyancer Users'. You will then be able to see a list of all users. In order to manage a specific individual's profile, you will need to click on the drop down arrow against their name and select the appropriate option.

How do I invite other colleagues to use the Portal?

Only the Portal Administrator can invite other users. If you are the Administrator you can invite other users by clicking on the drop down arrow in the top right hand corner of the home page and selecting 'Conveyancer Users'. You will then be able to select the 'Invite New User' link.

[Home](#)
[Submit Bonus Request](#)
[View Bonus Requests](#)
[View Bonus Returns](#)
[Contact Us](#)

[Home](#) /
 [Profile](#) /
 [Conveyancer Users](#) /
 Invite New User

Invite New User

* denotes a mandatory field.
 Please only use business email addresses. Do not use personal email address such as @gmail.com or @live.com.

First Name *

Last Name *

Email Address *

Confirm Email *

Main Phone

Submit

Conveyancer Management - Edit

The invitation link has been sent to selected user. This invitation will expire in 96 hours.

First Name *

Last Name *

Phone Number

Firm Name

Invitation Cancelled Reasons

Cancellation Reason

Activate

Cancel Invitation

Cancelling will mean the invitation link will no longer be valid.



- You may want to consider adding a member of your finance team to enable them to track any bonus payments made or to submit bonus returns.

How do I change a user status?

As a portal administrator you have the ability to manage the users within your Firm. The options are:

- Reactivate a User
- Deactivate a User
- You can 'deactivate' a user account (for example if a member of your Firm changes role or leaves the Firm) through the Conveyancer Users Options. Simply select the down arrow next to the individuals name and select deactivate. You can 'reactivate' an account at any time.
- Convert a Standard User to an Administrator. To change a standard user to an Administrator, simply select the down arrow next to the individuals name and select 'Convert to Administrator'.

Who is my responsible conveyancer?

The responsible conveyancer for a Bonus Request is the licensed and regulated individual who is responsible for the Bonus Request. If you are regulated then you will enter your own details here. If you are not regulated then you will need to agree within your firm who is responsible for this Bonus Request and enter their details.

What is my conveyancer identification number?

This is the regulatory body I.D. number of the responsible individual who has been assigned as the responsible conveyancer for the Bonus Request. The regulatory body ID number can be found on Lender Exchange or on your Practicing Certificate.

The portal does not recognize the postcode located in a London Borough - why?

If you are entering a postcode, the portal is designed to look for 7 digits including the spaces. Where a postcode has seven characters, please omit any spaces.

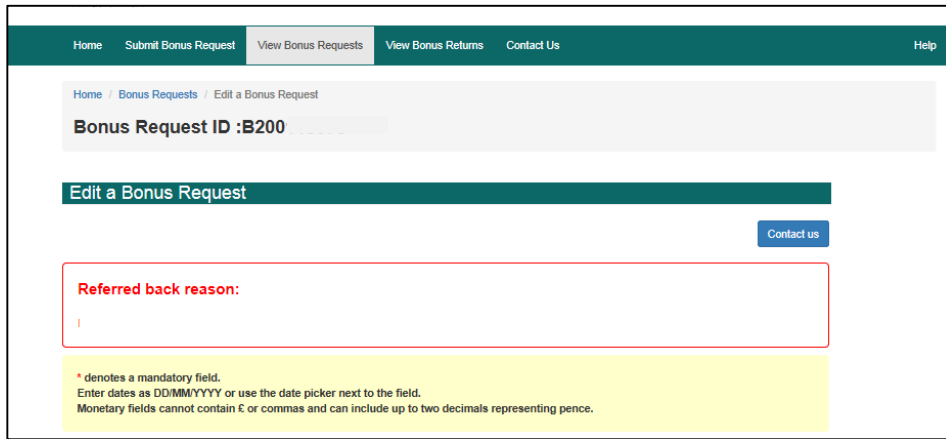
If the system recognizes the postcode is located in a London Borough then the corresponding 'Local Authority in London' field will populate with the correct value.

If the property is a new build you will need to identify the property as a new build and enter a plot number. (There are no character restrictions on the Plot Number field).

Why has my bonus application been referred?

If there are any errors or omissions on the bonus request submission the Scheme Provider will then refer the request back to you stating what additional information is required. To view this information:

- **Step 1**
Log onto the Portal.
- **Step 2**
Select 'View Bonus Requests'.
- **Step 3**
Select the relevant Bonus.
- **Step 4**
The reason for referral will be shown in the Bonus detail page in the top of the screen – highlighted in red.



Home / Bonus Requests / Edit a Bonus Request

Bonus Request ID :B200

Edit a Bonus Request

Contact us

Referred back reason:

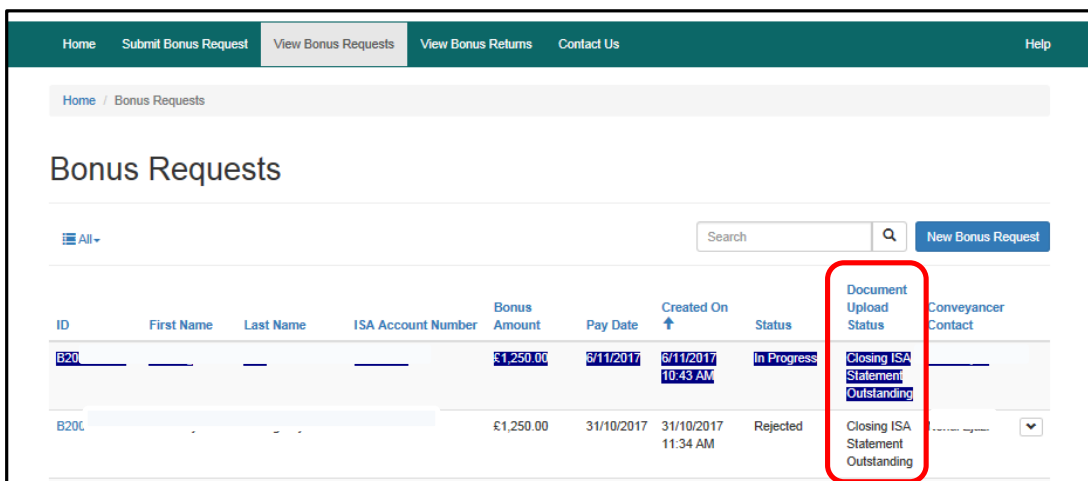
I

* denotes a mandatory field.
Enter dates as DD/MM/YYYY or use the date picker next to the field.
Monetary fields cannot contain £ or commas and can include up to two decimals representing pence.

- **Step 5**
Make the required changes
- **Step 6**
Check the 'First Time Buyer Declaration' box. If the payment date is within the next 5 days, select the 'Urgent Request' box.
- **Step 7**
Resubmit the bonus

How do I track what documents have been already been uploaded?

You can identify records that have and have not had supporting documents uploaded. In the 'View Bonus' Page the column named '**Document Upload Status**' shows the status.



ID	First Name	Last Name	ISA Account Number	Bonus Amount	Pay Date	Created On	Status	Document Upload Status	Conveyancer Contact
B200				£1,250.00	31/10/2017	31/10/2017 10:43 AM	In Progress	Closing ISA Statement Outstanding	
B200				£1,250.00	31/10/2017	31/10/2017 11:34 AM	Rejected	Closing ISA Statement Outstanding	

The exchange and completion are taking place on the same day, what is the process for claiming a bonus?

You should follow the standard bonus application process, ensuring that you leave sufficient time to ensure that the funds are transferred prior to exchange and completion. You may also be interested to know that there is a faster bonus application process for when a bonus request is urgent.

You can make an urgent bonus application and payment request via the online portal via the Expedited Bonus checkbox. If the closing documents are not yet available, the Help to Buy: ISA holder can use an up to date account statement. This must detail the following:

- Current balance
- Name
- Account Number
- Product name

You must submit the interim documentation above via the portal, confirming the 'yes/no' option that this is not the formal closing statement.

When the formal closing statement becomes available this should be submitted to the Scheme Provider when you submit the completion documents.

The purchase is now complete – what do I do now?

Please refer to the 'Confirming Your Bonus' section.

Completion has fallen through, what should I do?

If the same property is being purchased and the completion date is to take place within 3 months of you receiving the bonus funds, you may retain these funds in your firm's client account until completion takes place.

If the same property is being purchased but the completion date is NOT due to take place within 3 months of you receiving the bonus funds, you must return these funds to us.

If a different property is to be purchased to the one stated on the bonus request, the bonus funds must be returned to us and a new bonus request submitted on the alternative property.

If it is uncertain when the completion will go ahead and the client wishes to reinstate their Help to Buy: ISA account, you can complete and issue a 'Purchase Failure Notice' to your client even if she has not withdrawn from the purchase. You will also return the bonus funds to us.

The 'Purchase Failure Note' can be found in the Conveyancer Guidelines on Page 27, Annex B.

**If you have any queries on any aspect of claiming your Help to Buy:
ISA bonus please contact the Scheme Provider via the '[Contact Us](#)'
section of the Conveyancer Portal.**