H.M. TREASURY HELP TO BUY: ISA

Conveyancer Portal User Guide

April 2017
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Help To Buy: ISA

Register
Join the Help to Buy: ISA scheme through Lender Exchange

Request bonus
Complete the online bonus request at least 5 days before planned completion

Receive bonus
Paid into your client account

Confirm purchase
Upload Land Registry title
Help to Buy: ISA

From 23 May 2016 Conveyancers wishing to request a HtB: ISA Bonus will need to register with the Scheme Administrator via the relaunched Conveyancers Portal.

Web Address: https://www.helptobuyportal.org.uk/

Once a Firm has registered, the portal facilitates:

• Management and administration of firm users
  • Bonus request submission
  • Bonus status tracking
  • Return of a bonus
• Scheme administrator contact and;
• Property completion confirmation and title document submission
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 by clicking on the link.

For full details of the scheme please refer to the Conveyancer Guidelines, Scheme Rules and Conveyancer Adherence Agreement.
Help

This document aims to provide guidance on using the Conveyancer portal only.

Supported browsers:
• Microsoft Internet Explorer 9+
• 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

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

“Eligible 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 10, registration scenarios.

“Bonus” means the bonus, is an 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 Administrator.
Registration

To register your Firm log on to www.helpetobuyportal.org.uk and select Register Conveyancer Firm for Portal.

The first person to register on the portal will become the administrator for the location (see registration scenarios on following page). Once registered, additional users can be created by the administrator.

If another member of your branch tries to register on the Portal they will receive a message asking them to contact the branch’s administrator.
# Registration

There are four possible scenarios for registration:

<table>
<thead>
<tr>
<th>Scenario 1</th>
<th>Your Firm is a member of Lender Exchange and a Help to Buy: ISA Scheme member</th>
<th>see Registration (1) or click here</th>
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<tr>
<td></td>
<td>When registering for the Portal it is important to note that registration is linked to your Help to Buy Panel number</td>
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<td></td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Scenario 2</td>
<td>Your Firm is not a member of Lender Exchange but would like to join</td>
<td>see Registration (2) or click here</td>
</tr>
<tr>
<td>Scenario 3</td>
<td>Your Firm is a member of Lender Exchange but not a member of the Help to Buy: ISA Scheme</td>
<td>see Registration (3) or click here</td>
</tr>
<tr>
<td>Scenario 4</td>
<td>Your Firm is not a member of Lender Exchange and does not wish to join</td>
<td>See Registration (4) or click here</td>
</tr>
</tbody>
</table>
Registration (1)

If you are a member of Lender Exchange and a Help to Buy: ISA Scheme member select ‘Yes’ - you will then be asked to complete the details.

You will be required to enter your Lender Exchange ID and other information which will be verified with Lender Exchange.
To find details in Lender Exchange that you need to enter on the HtB: ISA Portal, a help guide is available.

Log on to Lender Exchange, and select Mortgage Documents. Select ‘Locating Lender Exchange Details for HtB: ISA Portal’.
Registration (2)

If you wish to join Lender Exchange you will be directed to their website.
Registration (3)

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.

https://www.lenderexchange.co.uk/

This will take you to an external website.

Please note: The Scheme Administrator operates independently from Lender Exchange and has no authority over Lender Exchange or its processes/procedures.
Registration (4)

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 Administrator 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.
Registration – Non Lender Exchange

Complete all fields to undertake the manual assurance process.

You will then be contacted by the Scheme Administrator.

Please allow 12 business days prior to expected completion for this process to be undertaken and the bonus payment made.

A firm can register as unassured on the portal without submitting a bonus request. The administrator will contact you once a bonus request has been submitted.
Registration – Non Lender Exchange

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

To complete your registration, click on submit and you will be guided to the password setting section.
Registration

You will receive an email to the address stated with an invitation to complete your registration.

This link will be valid for 48 hours only.

Dear

Thank you for registering as an administrator for your firm on the Help to Buy: ISA Conveyancer Portal. Please complete the registration process by following the link below:

Link

If you are having any problems accessing this link, please try copying and pasting it into your web browser. Alternately you can contact us via the portal.

Invitation Code

Please note that by registering with the Help to Buy: ISA scheme, you are agreeing to act in accordance with the scheme rules and conveyancer guidelines, these are referred to below.

Help to Buy: ISA scheme rules
Help to Buy: ISA conveyancer guidelines
Help to Buy: ISA conveyancer adherence agreement

If you do not believe this e-mail was intended for you please contact us:

Link

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme
Password

When you have clicked on this link you will be asked to set a password and provide answers to six memorable questions.

These security questions will be required should you need to reset your password.

Should you input the incorrect answers more than twice your account will be locked and you will need to raise a technical contact request. You will then be sent a link by email to reset your questions.

This link will be valid for 48 hours
Password Protocol

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.
Memorable Questions

These are set upon registration and only required if you need to reset your password at any time.

The portal allows two incorrect attempts to submit memorable questions after which you will need to send a request to the Administrator to reset the questions.

Please note the Scheme Administrator cannot reset your memorable questions until two invalid attempts have been made.

This link will be valid for 48 hours only.

Dear _______________________

A memorable question reset was requested for your account on the Help to Buy Conveyancer Portal. Please click the following link to start the memorable question reset process.

[Link]

If you are unable to click the link above, please try copying and pasting it in to your browser.

If you believe you received this email in error, please ignore it.

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
When you have completed your registration you will be taken to the home page.

**Please note:**

- **Before you submit a bonus request, it is important that you check your client’s eligibility criteria**

- **By registering with the Help to Buy: ISA scheme, you are agreeing to act in accordance with the Scheme Rules and Conveyancer Guidelines, these are available to view from this page.**
User Management

You can access other user accounts within your firm as well as your own profile by selecting the profile option once you have logged into the portal.

Using the profile option you can:

- manage and update your contact details
- manage access to the portal via the ‘Conveyancer Management’ Option
- view all registered users
Portal Administration/User Roles

The role of the portal administrator(s) is to manage all users within the portal for your office. (Refer to Registration scenarios on page 10).

It is recommended that you provide the name of the Firms portal administrator(s) to all appropriate personnel.

Portal Administrators can

- invite additional users
- deactivate accounts
- reactivate accounts.
If you wish to enable other colleagues within your Firm to submit/amend bonus requests the portal administrator must use the **Invite New User** option.

NB 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.

*The e mail address has to be unique to each person logging onto the portal. A generic email address should not be used.*
The User will then receive an email inviting them to complete their registration.

This link will be valid for 48 hours only.

Dear
You have been invited to register on the Help to Buy: ISA Conveyancer Portal.
Please complete the registration process by clicking the link below.

Link

If you are having any problems accessing this link, please try copying and pasting it into your web browser. Alternately you can contact us via the portal.

Please note that by registering with the Help to Buy: ISA scheme, you are agreeing to act in accordance with the scheme rules and conveyancer guidelines, these are referred to below.

Help to Buy: ISA scheme rules
Help to Buy: ISA conveyancer guidelines
Help to Buy: ISA conveyancer adherence agreement

If you do not believe this e-mail was intended for you please feel free to contact us

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Additional Users

The new user will be required to ‘Redeem their Invitation’ to complete their registration.

This link will be valid for 48 hours only.
Portal Administrator Access

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

- Reactivate a User
- Deactivate a User
- Convert a Standard User to an Administrator

Please note the ‘Lockout End Date’ is not functional.
Deactivate 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 option.

Select the down arrow next to the individuals name and select ‘deactivate’.

You can also ‘reactivate’ an account at any time.
Reactivate User

If you wish to ‘reactivate a user’ – please select this option from the drop down list, you will then receive the following message.
Changing your password

You can change your password at any time by selecting change password.
Change Email

You can amend or update your email address by selecting ‘Change Email’.
Changing an Administrator Role

If you wish to change a standard user to a portal administrator – select the appropriate User and Edit – you can then ‘Convert to Administrator’.

NB Only Portal Administrators can do this.

You can have up to 5 portal Administrators per office.
Amending your profile

To change any of your details you can do this in the ‘Profile’ section.

Once you have made your changes –select ‘Update’ to confirm.
Sign In

Email: is the original email with which you registered.

Password: if you can’t remember your password click ‘Forgot Your Password’ to reset
Password Reset

If you select ‘Reset Password’ you will receive an email notification.

Click on the link to reset your password.

This link will be valid for 48 hours only.

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Dear

A password reset was requested for your account on the Help to Buy: ISA Conveyancer Portal. Please click the link below to reset your password.

If you are having any problems accessing this link, please try copying and pasting it into your web browser. Alternatively you can contact us by making a service request via the portal.

If you have not requested a password reset please contact us at:

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Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme

*Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.*
Home Page

Once signed into the portal you can:

- Submit a Bonus Request
- View a Bonus Request
- Edit a Bonus Request
- Return a Bonus
- View Bonus Returns
- Contact us
- Confirm Completion
- Upload title documents
Sign out

Don’t forget to sign out when you have completed all your transactions.

You will be automatically logged out after 15 minutes of inactivity.
Submitting a Bonus Request

To request a bonus you will need the following information:

- Lender Exchange ID
- PII Policy Number
- Help to Buy: ISA Scheme Number (office specific)
- Your bank account number and sort code
- ISA Holder’s Details
- Property Details
- Supporting Documents – ISA Closing Statement and First Time Buyer Declaration (NB these documents must be .JPG, PNG or PDF attachments only)

Once all fields are completed please ensure that you tick the declaration.

Once submitted you will receive an email notification including a bonus reference which must be quoted in all correspondence.
Submitting a Bonus Request

If you are a member of Lender Exchange the details will be automatically populated using the Lender Exchange details entered at registration.

If your details have been updated in Lender Exchange you will also need to update them in the portal.

Please ensure all details are correct before submitting a bonus request.
Submitting a Bonus Request

Eligible Conveyancer Information:
This is the licensed conveyancer or practising solicitor who is eligible to submit bonus requests. The named individual will be accountable for this bonus request.

The Eligible Conveyancer Identification Number is the Eligible Conveyancer’s regulatory body ID.

If you are a member of the HtB: ISA Scheme through Lender Exchange – this ID needs to match that shown for the individual on Lender Exchange.

This is a mandatory field.
Submitting a Bonus Request

If you are not a member of Lender Exchange, complete all fields including your bank details and sort code.

Attach the First Time Buyer Declaration and ISA Closing Statement, tick the First Time Buyers declaration box and press ‘Submit’
Postcode

PLEASE NOTE:

If you are entering a postcode, the portal is designed to look for 7 digits including the spaces.

Therefore you may need to add or remove spaces as per the example below:

If the postcode is 5 digits long – it will have two spaces in between (e.g. S1 1AB)
If the postcode is 6 digits long – it will have one space in between (e.g. S11 1AB)
If the postcode is 7 digits long – it will have no spaces in between (e.g. S1111AB)

If the property is a new build it may be that the postcode is not yet recognised in our system therefore please contact us via the ‘Contact Us’ function and we will advise you further.
Supporting Documents

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

You will need to tick the declaration box to confirm you have attached the relevant documents.

Only JPG, PNG & PDF Attachments are accepted.
Maximum file size is 2Mb
Confirmation of Approved Bonus Request

Once your Bonus Request has been submitted and approved you will receive email confirmation.

Once the bonus has been paid (subject to the payment date you entered when submitting the bonus request) the Government Congratulation letter will be available for you to download.

NB  No bonus payments will be released unless a ‘pay date’ in entered by you.

Dear

Bonus Request number  B2000****  has been approved.

Upon receipt of the Bonus payment, please access the Help to Buy: ISA Scheme Conveyancer Portal and open the bonus request to download the Government “Congratulations Letter”. Please provide your client with a copy of the letter.

If you are having any problems, please contact us via the portal.

https://www.helptobuyportal.org.uk/
Government Letter

The Government letter must be printed and given to your client.

The letter will be automatically populated with:

- The date
- Your clients name and address
- The amount of the bonus

Dear [Purchaser’s name],

Congratulations on buying your first home with the support of the Government’s Help to Buy: ISA scheme. I wanted to write to you personally to confirm that you have received a Government bonus of [amount] towards your first home purchase.

The Government believes the current generation should have the chance to own their own home, in the same way as the previous generation did. That is why we set up the Help to Buy: ISA that is supporting first time buyers, like you, who are working hard to put away money each month to make the dream of home ownership a reality.

Thank you for participating in the Help to Buy: ISA scheme and congratulations on owning your first home.

Chancellor of the Exchequer
Status of bonus request transactions

- **Approved** – The Bonus request has been approved and will be paid in line with the Scheme Rules.
- **Approved on Hold** - this a pay dated has not been entered by your firm upon submission of the bonus. NB If this is the case then your Firm will be responsible for updating this when possible. **Without a ‘pay day’ the bonus payment cannot be made.**
- **Cancelled** – The Bonus request has been cancelled by your Firm.
- **Paid** – The Bonus has been paid.
- **In Progress** – The bonus request has been submitted to the Scheme Administrator 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.
Approved on Hold

If your bonus is showing as Approved on Hold.

You will need to edit the bonus and enter the date bonus to be paid. If this field is not completed the bonus will not be paid.
Dear Kelly Loft,

Bonus Request number B2******* has been rejected.

You can view the reason for the rejection and any action required via the Help to Buy: ISA Scheme Conveyancer Portal.

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

The reason for the rejection can be found within the 'Please Review' section in the Bonus Request screen. To access this, please go to 'View Bonus Request'.

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme.

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
View Bonus Requests

You can review all bonus requests that your firm (subject to registration – see Page 10) has made and see the status of the bonus – in progress/ submitted/approved on hold/ scheduled/ rejected or paid.

Please click on the relevant bonus to review in more detail.

NB If your bonus request is showing a status of ‘Rejected’ – this may be due to amendment being required. You will need to review the bonus and make any necessary amendments in order to re-submit the request for review.

Please ensure all necessary amendments are made and the bonus is resubmitted prior to completion of the property purchase.
Approved on Hold

If you have not submitted a date for the bonus to be paid the status of the bonus shows as Approved on Hold.

The status will remain until a future pay date is entered by your firm.

Dear ....

Your Bonus Request number B20001234 has been approved, however it has been placed on hold as there is no pay date supplied. When you know when the bonus payment is required, please update the bonus request via the Help to Buy: ISA Scheme Portal and submit again.

Please quote this number in all correspondence with us.

You can track the status of your Bonus Request or contact us with any problems via the portal.

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

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme
Bonus Rejection

Should a bonus be rejected you will receive the email shown on the right.

By selecting the bonus reference under the View Bonus Requests tab you can select a bonus. The rejection reason will be stated under the ‘Please Review’ Section towards the bottom of the page.

Dear Kelly Loft,

Bonus Request number B2****** has been rejected.

You can view the reason for the rejection and any action required via the Help to Buy: ISA Scheme Conveyancer Portal.

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

The reason for the rejection can be found within the 'Please Review' section in the Bonus Request screen. To access this, please go to 'View Bonus Request'.

Kind Regards,
UKARcs
Administrator of the Help to Buy: ISA Scheme.

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Editing a rejected bonus request

Once your bonus request has been rejected, the facility to edit the request becomes available as shown on the right.
Returning a Bonus

If a property purchase fails after the bonus has been paid, you will then need to raise a Bonus Return.

Should you need to return a bonus, Select the drop down arrow and click on return bonus.

Please note a bonus can only be returned once it has been paid.
Returning a bonus

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.

The Date Invoice Raised will be automatically populated with the date you request the return. NB This be raised.

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.
Purchase Failure Notice

Once you have selected ‘return bonus’ you will receive an email detailing the next steps.

You will need to complete the ‘Purchase Failure Notice’ and give this to your client.

Dear [Name],

Thank you for advising us that you wish to return bonus number [Bonus Number].

Please arrange for the funds to be returned within 10 Business Days quoting [Bonus Number].

You can view this returned bonus payment via the Help to Buy: ISA Scheme Conveyancer Portal.

Find attached [purchase failure notice] which should be filled in and provided to your client to support them in re-opening their ISA Account and requesting a bonus payment in the future.

If you have any problems, please contact us via the portal.

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Returning a bonus

Please be aware you have 10 business days to return the bonus funds.

The details of where to return the funds are shown.
Cancelling a Bonus Return

If you need to cancel your Bonus Return please select the appropriate bonus and click ‘cancel’.

You will receive a confirmation of your return via email.

Dear

The request to return the bonus request ref: has been cancelled.

You can view this within the Help to Buy: ISA Scheme Conveyancer Portal.

If you have any problems, please contact us the portal.

Kind Regards,

UKARcS
Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
View Bonus Returns

You can review all bonus returns made by your Firm (subject to registration – please refer to Page 10).

You can select any field to sort your requests by clicking on the ⬆.
Bonus Returns

Once you have returned your bonus you will receive confirmation by email.

Dear

Thank you for returning bonus number: Reference

You can view this returned bonus payment within the Help to Buy: ISA Scheme Conveyancer Portal.

If you are have any problems, please contact us via the portal.

Kind Regards,

UKARcs
Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Bonus Return Status

Bonus Return Status:

**Accepted** – Return has been created and submitted by your Firm.

**Awaiting Return** - UKARcs are awaiting payment return – the Return Request cannot be amended at this point.

**Cancelled** – the payment return has been cancelled by your Firm or by UKARcs finance department.

**Returned** – the payment return has been received.
Confirming your bonus

Once your client has completed their purchase you should confirm this on the portal by choosing the appropriate bonus and selecting ‘Confirm Purchase’ at the bottom of the screen.

Please ensure you complete the date of purchase, click on the declaration, then press submit.
Confirming your bonus

You will receive the following notification.

Bonus Request ID: B200010

Confirm your Bonus Request

Bonus Request Updated. The status is Completed. To review the record, please click on the link B200010272. If you have not received an email within four hours, please check it is not in your 'junk' mailbox, otherwise contact us.
Submit Title Documents

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

Please note the maximum file size 2Mb

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

The ‘Revert to Paid’ button should only be used if you need to return the bonus once it is shown as completed.
‘Contact Us’ Requests

Select the reason for the contact from the drop down list:

- Bonus Request
- Returned Bonus
- Conveyancer complaint
- Expedited Bonus Request
- Technical issues
- Bonus Completion Letter

and complete the detail of your query.

The Scheme Administrator will respond to your query.
Thank you for contacting us on the Help to Buy: ISA Conveyancer Portal.

Your reference number is CAS-08703-******. Please quote this in all correspondence with us.

We are currently investigating your query and we will contact you as quickly as possible.

You can view your current requests within the portal.

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

Kind Regards,

UKARcs

Administrator of the Help to Buy: ISA Scheme

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Contact Requests

You can review all of the ‘Contact Requests’ you have made and the status of the Request.