

DocBox - Top Tips



Quick and easy ways to get your application at the top of our queue.

✓ Do's

Initial supporting documents

- ✓ Do upload all **initial supporting documents** directly into our secure portal using DocBox. If the application is visible under the 'Active Applications' tab in Portal – DocBox should be used for **Instant Upload**. [Access 'Active Applications' here](#)
- ✓ Do upload all **initial supporting documents** into DocBox **at the same time**, using the [Application Submission Checklist](#).
- ✓ Do ensure all different document types are **uploaded separately** (e.g. split out each document by type, for example 'income' or 'bank statements').
- ✓ Do supply **all documents at the same time** as our team will only action the file once all supporting documents are held.
- ✓ Do upload Bankwest valuations into DocBox if you have ordered an **upfront valuation**.



✗ Don'ts

- ✗ Don't upload anything in to **ApplyOnline (AOL)** including broker submission notes.
- ✗ **Don't double up** and upload through just to 'be safe'. This means double the documents on the file and double the time to assess your deal. Tip! To confirm your documents have reached us, just search the submission history screen in DocBox, which will show you all received documents.
- ✗ **Don't upload Credit Files via DocBox**. Credit File information (such as Equifax reports) should not be sent to the bank and cannot be saved in our systems.
- ✗ **Don't upload one document that contains all the supporting documents** in it, as this will delay your application by 1 business day, make sure you split them out.
- ✗ **Don't select document type as 'Other' in DocBox** unless there is no other relevant document type to pick from in the drop-down list. Unknown document types require renaming (and therefore can cause delays) and any corresponding notes will disappear once renamed.

Requested documents

- ✓ Do upload documents requested once the case has been assessed (e.g. **MIR items**) directly into our secure portal using DocBox and all **at the same time**.

- ✗ **Don't supply one document at a time**, only upload all missing documents once you have addressed all points within the MIR.

Correspondence

- ✓ **Do respond to us directly through DocBox** if you receive an email from Bankwest via 'CPS out' (e.g. **MIR**). Just free type in the commentary box & upload. This will wake up the case immediately.

- ✗ **Don't respond to the 'CPS out' email** or via the 'supportingdocs' email, as this will not move your application to the action queue for at least 1 business day.

Changes

- ✓ Do let us know via the commentary box in DocBox of **any changes you need made** to the file (e.g. product switch/increase loan amount) & upload your [Rework Form](#).

- ✗ Don't email us your **changes**, as this will not move your application to the action queue for at least 1 business day.

Please Note: Maintenance requests, Home Loan Transfers, Progress Payments, and Discharges will be in the next phase of DocBox. You are still required to use the supporting docs email option for these types of requests.

Get customer signatures on the go.

Digital signatures are acceptable on the below list of Bankwest forms:

- | | | |
|---|---|--|
| <input type="checkbox"/> Direct Debit Authority | <input type="checkbox"/> FHOG | <input type="checkbox"/> Responsible Lending Rework Template |
| <input type="checkbox"/> Discharge Authority | <input type="checkbox"/> Verification of Identity (VOI) | <input type="checkbox"/> Fixed Rate Cap |
| <input type="checkbox"/> Home Loan Maintenance | <input type="checkbox"/> Privacy Consent Notice (PCN) | <input type="checkbox"/> Progress Payment Customer Authority |

