

Conveyancer Zone

User Guide



[Click here to access Conveyancer Zone](#)

Click on the boxes below to jump to the document section or web page listed

Dashboard – Case Management	Dashboard – Panel Membership	LMS Account Checker
Update Case	Addendums	User Admin
Search Cases	Check Panel Membership	Lender documents
Assign Case Handler	Renew Panel Membership	Password Management

LMS manage conveyancing panels for a number of mortgage lenders through its service, Panel Link®. Panel Link® offers law firms access to multiple lender panels with increased operational efficiency and support. One of the key benefits is providing speedy access to mortgage offers, valuations and other documents electronically via our secure system, Conveyancer Zone. Using Conveyancer Zone you are also required to upload post completion/charge registration documents providing increased visibility to mortgage lenders and reducing your postage costs. You are also able to manage your panel memberships via the site including joining new lenders panels.

This document provides information on how you use Conveyancer Zone. We also offer the ability for you to integrate your system to ours further improving your operational efficiency, for further information please contact

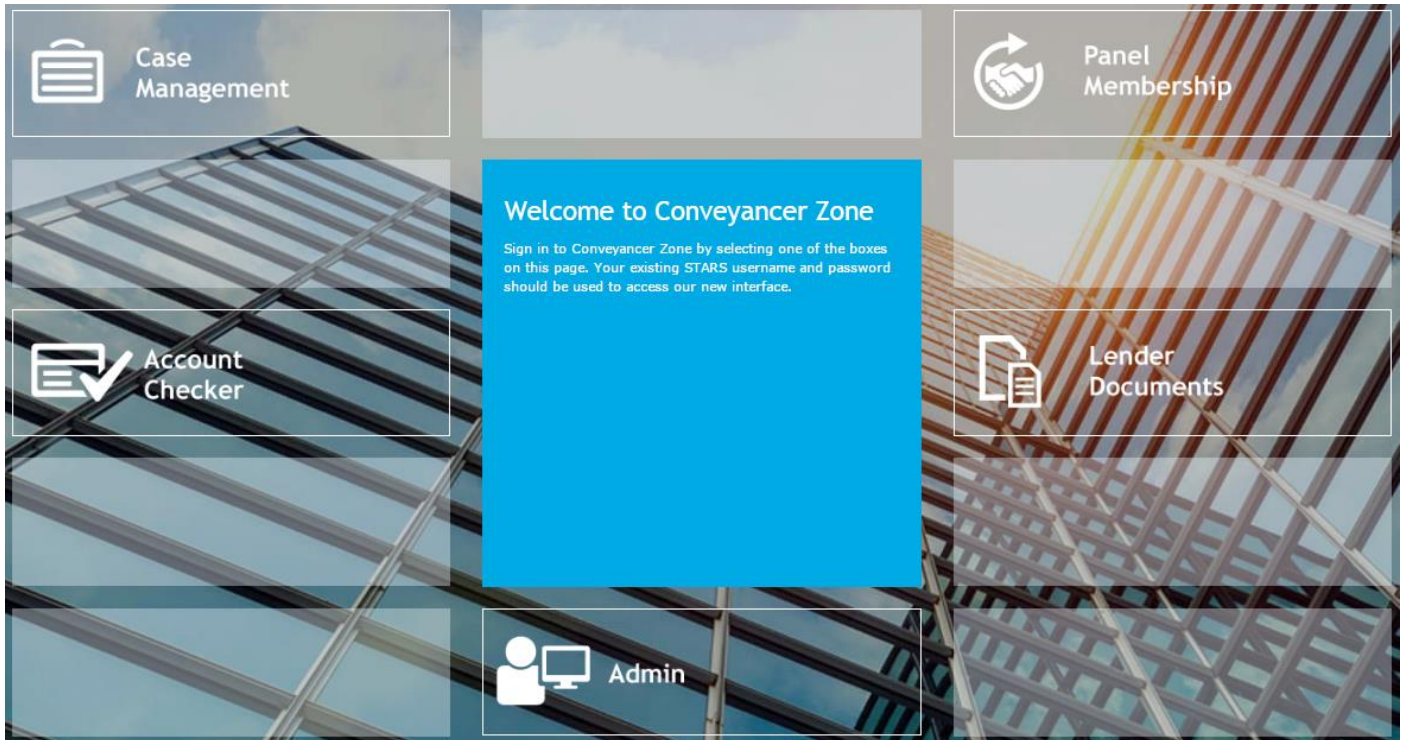


lenderpanels@lms.com.



Home Page

Visiting <https://www.lmsuk.com/ConveyancerZone/account/login> takes you to our landing page which allows you to access functionality across Conveyancer Zone.




You are presented with options to help you navigate; some sections require you to login:

- **Case Management** – access cases and upload/download documents
- **Account Checker** – access LMS' client account checking service which is available to you for free on cases managed by LMS
- **Panel Membership** – manage your panel membership from updating your firms details to applying for new lender panels or uploading your PI or practising certificates
- **Lender Documents** – access documents from lenders to accompany the mortgage offer, such as Mortgage Deeds and Certificate of Titles
- **Admin** – you will be able to manage your password and depending on your access level create, edit and disable users for Conveyancer Zone

Dashboard








Once you have logged in to Case Management or Panel Membership you will be presented with our dashboard.

The dashboard provides information on your cases and panel membership ensuring you are always aware of required actions.



You are in Case management
Home Help Log out Menu

Welcome

	Cases assigned to you	11	View
	Assign case handler to cases	6	View
	Documents available to download	0	View
	Priority notice (OS1/OS2/K17) to upload	8	View
	Application to Register to upload	0	View
	Registration documents to upload	2	View
	Charge registration delay reasons required	2	View

Panel membership expiry date
14/10/17
[Check panel membership](#)
[Update details](#)

Indemnity Insurance Certificate expiry date
10/09/20
[Upload new document](#)

Current Practising Certificate expiry date
31/10/17
[Upload new document](#)

Active

Expiring soon

Expired

Pending Review

Please alert your Panel Link Membership Manager if action is required. Your panel memberships are at risk if we do not hold current information for your firm.

[Click to search cases >](#)

Dashboard – Case Management

The case management section offers you a quick view of documents or updates available to you and required from you.

- **Cases assigned to you** – all cases that you have been assigned as the case handler
- **Assign case handler to cases** – assign cases to a specific case handler ensuring that communications from LMS are directed as required
- **Documents available to download** – new documents, such as mortgage offers, which have not previously been downloaded by your law firm
- **Advance / Priority notice (OS1/OS2/K17) to upload** – cases where you are required to upload a Priority/Advance Notice (OS1/OS2/K17) to comply with the lenders charge registration obligations
- **Application to Register to Upload** – cases where you are required to upload a copy of the application to register to comply with the lenders charge registration obligations
- **Registration Documents to upload** – cases where you are required to upload evidence that the mortgage lenders charge has been registered
- **Charge registration delay reasons required** – cases where you are required to provide a charge registration delay reason. You are required to provide us with a reason for the delay at least every thirty days until registration is complete and the required documents have been uploaded.

Dashboard – Panel Membership

All users are able to view this section, however, only users set up as Panel Link Membership Managers are able to access the panel membership section of the system.

Panel membership expiry date	16/10/17	Check panel membership Update details
Indemnity Insurance Certificate		Upload new document
Current Practising Certificate expiry date	31/10/17	Upload new document

■ Active
 ■ Expiring soon
 ■ Expired
 ■ Pending Review

Please alert your Panel Link Membership Manager if action is required. Your panel memberships are at risk if we do not hold current information for your firm.


- **Check panel membership** – this allows you to see which lender panels you are currently a member of, which you are eligible to apply for and to join new panels
- **Update details** – update your firms details at any time including address or Bank details changes
- **Indemnity Insurance Certificate** – upload and view indemnity insurance certificates
- **Current Practising Certificate** – upload and view current Practising Certificates


Help


















Throughout the site you will be able to access the 'Help' section which allows you to view user guides and video demonstrations of the site.

Help

This section provides user guides and video demonstrations of each section of the site to assist with its use. Please refer to these prior to contacting LMS.


 Indicates an online demo (Best viewed in IE9+, Google Chrome or Mozilla Firefox. Demo will open in a new window)

 Indicates a PDF document (Requires a PDF Reader to open)

General overview	Case management	Panel membership	AccountChecker	Lender documents
<p> Conveyancer Zone overview</p>	<p> Cases assigned to you</p> <p> Assign case handler to cases</p> <p> Documents available to download</p> <p> Priority notice (OS1/OS2/K17) to upload</p> <p> Advance notice to upload</p> <p> Application to register to upload</p> <p> Registration documents to upload</p> <p> Charge registration delay reasons required</p>	<p> Check panel membership</p> <p> Renew panel membership</p> <p> Update your information</p> <p> Update your information - add a new branch (incl. online Direct Debit)</p> <p> Upload Indemnity Insurance Certificate</p> <p> Upload Current Practising Certificate</p>	<p> How to check the account number and sort code of a law firms client account</p>	<p> How to view and download legal documents</p>

Menu

The dynamic menu can be accessed at any time through the Menu icon in the top right of the site at all times allowing you to easily navigate across Conveyancer Zone.

[Home](#)
[Help](#)
[Log out](#)
[Menu](#)


Case management

Cases	Uploads / Downloads	Delay reasons needed
Dashboard Search Cases assigned to you Cases to assign	Priority notices to upload Application to Register to upload Registration documents to upload Cases with documents to download	No charge registration documents available

[Search cases](#)
[Help](#)

[Account checker](#)
[Lender documents](#)

[Panel Membership](#)
[Admin](#)

[Manage password](#)

Case Management

Search Cases

Clicking search cases on any of the screens allows you to search for cases using: conveyed postcode; client name; LMS reference; or lender reference.

We always include the LMS reference in any emails we send to you regarding specific cases.

Search cases

You may search for a case by conveyed postcode, client surname, LMS Reference, or Lender Reference. Simply specify type of search you wish to use, then enter the criteria.

Client surname searches accept a * wildcard. So, you may enter S* to search for names starting with S.

Select search type:

- ☒ **Conveyed postcode**
- ☐ Client name
- ☐ LMS reference
- ☐ Lender reference

Searching by conveyed postcode

If you are unable to view a case using our reference then this is most likely as the access level you have been granted restricts you from seeing the case. Your Conveyancer Zone administrator will be able to increase your permission level allowing you to view the case. If you continue to have problems please contact our IT Support team.

Cases Assigned to you

This section shows all cases that have been assigned to you as the case handler.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Cases assigned to you

Created after: <input type="text"/> <input type="button" value="Apply"/>				
Q Search <input type="text"/> <input type="button" value="Search"/>				
10 <input type="button" value="List"/>				
LMS Reference	Lender	Client Name	Conveyed Postcode	Created date
3456238	Metro Bank	D Davis	XX1 1XX	30/08/2016
3456236	Metro Bank	G Baker	XX1 1XX	30/08/2016
3456235	Metro Bank	R Jones	XX1 1XX	30/08/2016
3455503	West Bromwich Building Society	G Warren	XX1 1XX	09/08/2016
3433179	Virgin Money	R Timms	xx1 1xx	01/10/2015
3433178	Virgin Money	S Durkin	xx1 1xx	01/10/2015
3433177	Virgin Money	J Bennett	xx1 1xx	01/10/2015
3433176	Virgin Money	P Wyatt	xx1 1xx	01/10/2015
3433080	Virgin Money	C Wood	xx1 1xx	01/10/2015
3433011	Virgin Money	M Young	xx1 1xx	01/10/2015

Cases to assign

Assigning a case handler to a case in Conveyancer Zone will ensure that any case specific communications will be sent directly to that person to reduce your administration time forwarding on emails from one person. The case handler can be changed at any time within the case.

Not all users have access to assign a case handler. If you don't have access and require it please speak to your Conveyancer Zone administrator who will be able to update your user group.

To assign a case handler select 'Cases to assign' from the Dashboard or menu. If you have more than one office select the appropriate office then tick the cases you wish to assign, choose a case handler from the drop down and click 'assign'. You can select all cases on a page using the tick box adjacent to the header 'Select'.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Cases to assign				
Office: Simon Test Law Firm - Ellesmere Port			Search	10
LMS Reference	Lender	Client Name	Conveyed Postcode	Select
3843321	The Melton	M Tester_123	CH65 9HQ	<input type="checkbox"/>

Showing 1 to 1 of 1 entries

Case handler:

If a case already has a case handler assigned it will not show in this section. To change a case handler go to the case and select a new case handler from the drop down and select 'Reassign case handler'.

If the case handler you want to assign the case to does not exist please speak to your Conveyancer Zone administrator.

Documents available to download

Mortgage lenders are using LMS to securely and efficiently distribute documents to law firms via Conveyancer Zone. These documents include Mortgage Offers and Valuations and will vary depending on the mortgage lender.



Documents that have not yet been downloaded by your law firm will be available in this section. If you wish to download a document again you can access them in the case screen. Use the Download button which will prompt a PDF of the document to be displayed or downloaded by your internet browser or click on the LMS reference which will take you to the case.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Documents available to download				
			Search	10
LMS Reference	Lender	Client Name	Conveyed Postcode	Document type
3842416	Tipton & Coseley Building Society	I Tester_123	CH65 9HQ	Mortgage Offer <input type="button" value="Download"/>
3842411	MBS Lending	J Tester_123	CH61 6UL	Mortgage Offer <input type="button" value="Download"/>
3842406	Marsden Building Society	J Tester_123	CH65 7BA	Mortgage Offer <input type="button" value="Download"/>
3842402	Hinckley and Rugby Building Society	M Tester_123	CH2 1HB	Law Firm Mortgage Offer <input type="button" value="Download"/>
3842396	Chorley Building Society	M Tester_123	CH4 8PX	Consent to Mortgage Form <input type="button" value="Download"/>
3842392	Buckinghamshire Building Society	M Tester	CH7 1GB	Mortgage Offer <input type="button" value="Download"/>
3842388	Bluestone Mortgages	M Tester_123	CH65 9HQ	Mortgage Offer <input type="button" value="Download"/>
3831829	Ipswich Building Society	M Tester_123	CH65 9HQ	Mortgage Offer <input type="button" value="Download"/>
3831829	Ipswich Building Society	M Tester_123	CH65 9HQ	Mortgage Offer <input type="button" value="Download"/>
3640060	Virgin Money	M Tester_123	CH65 9HQ	Virgin Mortgage Offer <input type="button" value="Download"/>

Showing 1 to 10 of 10 entries




Some lenders require that you provide information before you are able to download a document. For example, Virgin Money ask that you provide an estimate on when you think the transaction will complete which can be done by selecting a month from the drop down and selecting 'Set'. You are able to change the estimated completion date at any time.

Document	Document name	Uploaded date	View
 1	Virgin Mortgage Offer	18/10/16 - 16:27	Provide the planned completion month: 
			<div> <input type="text"/> <div> October 2016 November 2016 December 2016 January 2017 February 2017 March 2017 April 2017 </div> </div> <div>Set</div>

Priority/Advance Notices (OS1/OS2/K17) to upload

This section shows any Priority (OS1/OS2/K17) Notices or Advance Notices that are required to be uploaded. You can upload the document on this page by clicking 'Provide Document' or by clicking on the LMS reference which will take you to the case.









You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Priority notices to upload				
<div>  Current document about to expire  Current document has expired </div>				
<div> <input type="text"/> Search <div>  10  </div> </div>				
LMS Reference	Lender	Client Name	Conveyed Postcode	
3842411	MBS Lending	J Tester_123	CH61 6UL	<div>Provide document</div>
3842392	Buckinghamshire Building Society	M Tester	CH7 1GB	<div>Provide document</div>
<div>   1   </div>				Showing 1 to 2 of 2 entries

Application to Register to upload

This section shows any Application to Registers which you are required to upload, you can upload the document on this page by clicking 'Provide Document' or by clicking on the LMS reference which will take you to the case.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Application to Register to upload				
<div>  up to 10 days overdue  11+ days overdue </div>				
<div> <input type="text"/> Search <div>  10  </div> </div>				
LMS Reference	Lender	Client Name	Conveyed Postcode	
3842411	MBS Lending	J Tester_123	CH61 6UL	<div>Provide document</div>
3842392	Buckinghamshire Building Society	M Tester	CH7 1GB	<div>Provide document</div>
<div>   1   </div>				Showing 1 to 2 of 2 entries

Registration documents to upload

This section shows any cases where we require evidence that the charge has been registered. You can upload the document on this page by clicking 'Provide Document' or by clicking on the LMS reference which will take you to the case.

If you are unable to upload this document then you may be required to provide a charge registration delay reason to satisfy the lenders requirements.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Registration documents to upload				
30-60 days overdue 60+ days overdue				
<div> <input type="text" value="Search"/> <input type="button" value="10"/> <input type="button" value="List"/> </div>				
LMS Reference	Lender	Client Name	Conveyed Postcode	
3842388	Bluestone Mortgages	M Tester_123	CH65 9HQ	<input type="button" value="Provide document"/>
3831829	Ipswich Building Society	M Tester_123	CH65 9HQ	<input type="button" value="Provide document"/>
3640060	Virgin Money	M Tester_123	CH65 9HQ	<input type="button" value="Provide document"/>
<div> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> </div>				Showing 1 to 3 of 3 entries

Charge registration delay reasons required

Where you have been unable to register the mortgage lenders charge within thirty days of completion you are required to provide us with a reason for the delay at least every thirty days until registration is complete and the required documents have been uploaded.

You can provide the delay reason 'Provide delay Reason' or by clicking on the LMS reference which will take you to the case.

You are able to sort the data by clicking on the headers, can use the search box to enter criteria that will search across the shown headers and view more cases per page. By default 10 cases will display per page, you can navigate pages at the bottom of the screen.

Charge registration delay reasons				
30-60 days overdue 60+ days overdue				
<div> <input type="text" value="Search"/> <input type="button" value="10"/> <input type="button" value="List"/> </div>				
LMS Reference	Lender	Client Name	Conveyed Postcode	
3842388	Bluestone Mortgages	M Tester_123	CH65 9HQ	<input type="button" value="Provide delay reason"/>
Date: 17/10/16	Delay reason	<input type="text" value="Choose a reason..."/>	<input type="text" value="Calendar days..."/>	<input type="button" value="Submit"/>
<div> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> </div>				Showing 1 to 1 of 1 entries

Case Screen

When selecting to view a case you will be taken to the case screen which includes a number of sections:

Search cases		Click to expand/collapse
Case details - 3842411		Click to expand/collapse
LMS AccountChecker		Click to expand/collapse
Documents to download	2	Click to expand/collapse
Documents to upload	2 ^(Required)	Click to expand/collapse
Charge registration delay reasons required		Click to expand/collapse
View case related communications		Click to expand/collapse

Case details

This section shows basic information regarding the case and allows you to update the case handler or provide your own reference. If you provide your own reference this will show on any invoices from LMS.

Case details - 3842411 Click to expand/collapse		
Lender details:	Lender - MBS Lending	Reference -
Case details:	Client name(s) - Mrs Joan Tester_123	
	Conveyed Address - 4 Ashcroft Drive, Heswall, Wirral, Merseyside, CH61 6UL	
Case handler assignment:	<input type="text" value="Darren Jones"/>	<input type="button" value="Reassign case handler"/>
Service reference:	<input type="text"/>	<input type="button" value="Update"/>

Account checker

Click on the banner to access LMS' client account checking service which is available to you for free on cases managed by LMS.

LMS AccountChecker	Click to expand/collapse
Click here to access LMS AccountChecker service which is available to you for free on cases managed by LMS.	
<input type="button" value="LMS AccountChecker"/>	

Documents to download

Here you can download documents that have been provided by the mortgage lender or documents that you have previously uploaded. If you need to provide a new version of a document you have already uploaded select 'Provide New Version' and it will display in the 'Document to upload' section.

Documents to download

2

Click to expand/collapse

To provide a new version of a document please click the "Provide New Version" button. You may then upload a new version in the Document Upload section below.

Please [click here](#) to view the mortgage offer enclosure documents.

Document	Document name	Uploaded date	View
1	Mortgage Offer	16/10/16 - 11:12	Download
2	Priority Notice (OS1/OS2/K17)	17/10/16 - 06:06	Notice expiry date 19/10/16 Download Provide new version
3	Law Firm Mortgage Offer	16/10/16 - 11:12	Download

Some lenders require that you provide information before you are able to download a document. For example, Virgin Money ask that you provide an estimate on when you think the transaction will complete which can be done by selecting a month from the drop down and selecting 'Set'. You are able to change the estimated completion date at any time in the same way.

Documents to upload

To assist with monitoring post completion activity you are required to upload charge registration documents to the mortgage lender via Conveyancer Zone.


The documents that you are required to upload vary between mortgage lenders and a link to your requirements can be found on the case. Documents may need to be uploaded in order, for example a copy of the Priority/Advance Notice would need to be provided before you can upload a copy of the application to register.

Documents to upload


2 (Required)

Click to expand/collapse

You are required by the mortgage lender to upload the following document(s). To view the charge registration requirements for the mortgage lender please [click here](#)

	Document name	Upload	Required information
	Required	Confirmation of Application to Register <div>Drop a file here to upload. Alternatively select 'Browse'.</div> Browse	Upload

Documents required at later stage

	Required	Official Copy Register
	Optional	Guarantees/Warranties
	Optional	Signed Mortgage Deed
	Optional	Other Consents/Certificates

For some documents you are required to provide supplementary information such as an expiry date for a priority or advance notice.

* If registration is going to take more than 30 days you are required to provide regular delay reasons in Conveyancer Zone which provides visibility to the mortgage lender on their charge. Further information can be found by clicking [here](#).

Where you do not comply with the mortgage lenders obligations you will receive chase emails from LMS who may then intervene at a cost to you and suspend your panel membership.

Providing a Charge Registration Delay Reason

Where you have been unable to register the mortgage lenders charge within thirty days of completion you are required to provide us with a reason for the delay at least every thirty days until registration is complete and the required documents have been uploaded.

Choose the relevant delay reason from the drop down box, set an expiry date (maximum of thirty days) and click 'Submit'.

Charge registration delay reasons required
Click to expand/collapse

If you have been unable to register the mortgage lenders charge within thirty days of completion you are required to provide us with a reason for the delay at least every thirty days until registration is complete and the required documents have been uploaded.

No registration delay reasons have been added.

Add a delay reason

Date: 17/10/16
Delay reason
Choose a reason...
Calendar days...
Submit

Below is the list of standard delay reasons you can choose from:

- Application to register cancelled or incorrect: further application to be submitted
- Application to register made: first registration
- Application to register made: landlord, management company, freeholder consents outstanding
- Application to register made: no requisitions raised or outstanding
- Application to register made: requisitions outstanding not related to existing charge
- Application to register made: requisitions outstanding relating to discharge/vacate of existing charge
- Application to register not yet submitted to the Land Registry

For the rare occasions that the delay is for another reason there is an 'Other' option which will allow you to input free text.

Case Related Communications

This section shows copies any of communications sent to you by the LMS system.

View case related communications
Click to expand/collapse

The following is a list of communications that have been sent to your firm relating to this case. Click download for a copy of the body of the message sent. Please note occasionally a copy will not be available.

Date sent	Subject	Job name	
14/10/2016 11:25	New notification from LMS: Tester_123 CH61 6UL. Our Ref: 3842411	GPM Law Firm Notification Email	Download

Panel Membership

Check Panel Membership

In this section you are able to see which lender panels you are a member of, which panels you are eligible to apply for and which panels you do not meet the criteria for. If you wish to join one of the available panels please check the box and accept the lenders Addendum to the panel Terms and Conditions. You are able to apply for more than one panel at a time.

Panel Membership

Set out below are all of the lenders that have partnered with LMS to manage their general conveyancing panel. The table shows which panels you are currently a member of and the panels that your law firm may be eligible to join. Please read the information boxes for additional criteria. All panel applications will be reviewed by a member of the Supplier Management Team, during this time the membership status will show as pending.

An Addendum to the Panel Membership Terms and Conditions must be accepted for each lender panel that you wish to join.


Conveyancing criteria

Select the lender panels you would like to apply to join *	Purchase completions in the last 12 months (with any lender) *	Professional Indemnity Insurance Limit of Indemnity (per claim) *	Accreditations / Regulation *	Number of Partners/ Directors/Principles *
Minimum Requirements				
<input checked="" type="checkbox"/> Virgin Money	N/A	£2,000,000	SRA, CLC, LSS or LSNI	1
<input type="checkbox"/> Atom Bank	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Bluestone Mortgages	120	£2,000,000	SRA, CQS or CLC	2
<input type="checkbox"/> Buckinghamshire Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Chorley Building Society	N/A	£2,000,000	SRA, CLC or LSS	4
<input type="checkbox"/> Hinckley & Rugby Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Ipswich Building Society	N/A	£2,000,000	CLC, SRA	2
<input type="checkbox"/> Marsden Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Newcastle Building Society	120	£2,000,000	CQS, CLC or LSS	2
<input type="checkbox"/> Tipton & Coseley Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Melton Mowbray Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Metro Bank	120	£2,000,000	CQS	2
<input type="checkbox"/> Monmouthshire Building Society	120	£2,000,000	CQS or CLC	2
<input type="checkbox"/> Newcastle Building Society (Northern Ireland)	72	£2,000,000	LSNI	2
<input type="checkbox"/> West Bromwich Building Society	120	£2,000,000	CQS or CLC	2

Panel addendums available to download and read

By ticking the checkbox(es) below you confirm that you have read and agree to each lenders Addendum. We are entitled to assume that the person(s) accepting the Addendum has sufficient authority to bind the firm. Each document must be downloaded and read before continuing.

Once the Addendum has been downloaded it can only be accepted by the same Panel Link Membership Manager if the version has not changed since the initial download. New users or Addendum changes will require a further download.

 [Hinckley and Rugby Building Society Addendum](#)

☐ I have read and agree to the terms of the Addendum

Apply

The information box will provide you with additional criteria that your firm must meet to be accepted onto the lenders panel.

<input type="checkbox"/> Buckinghamshire Building Society	120	£2,000,000	CQS or CLC
<input type="checkbox"/> Chorley Building Society			
<input type="checkbox"/> Hinckley & Rugby Building Society			
<input type="checkbox"/> Ipswich Building Society			
<input type="checkbox"/> Marsden Building Society	120	£2,000,000	CQS or CLC

Your firm must conduct ID Checks and DBS (Previously CRB) checks on any new residential conveyancing employee's, your firm must have an active mortgage fraud prevention policy in place, your firm must have a complaints handling procedure, your firm must conduct internal file audits at least every 12 months, your firm must have risk management processes in place including a conflict of interest identity process and your firm must have an up to date disaster recovery plan.

Please note that for some lender panels you must have a valid direct debit in place before you are able to join the panel.

Direct Debit

Lemmings (Head Office)	Paper Direct Debit Received
Tiptown	Paper Direct Debit Received

The key below shows your current status for each lender.

■ Panel member
 ■ Panel membership expiring soon
 ■ Membership expired
 ■ Membership pending
 ■ Available for application
 ■ Criteria not met

View Addendums

When we start managing a panel for a lender the current panel members that meet their criteria are invited to accept the lenders Addendum to re-join the panel. In these instances you are able to complete this process by accepting the Addendum within this section of the system. You can access the panel Terms and Conditions and all applicable Addendums in this section of the system.

Addendums

This page contains the Panel Membership Terms and Conditions and Addendums for each of the lender panels that your firm is a member of. When you are mapped to a lender panel by LMS, for example when on boarding a new lenders panel, the Addendum will be available here for you to download and accept.


Panel addendums available to download and read

By ticking the checkbox(es) below you confirm that you have read and agree to each lenders Addendum. We are entitled to assume that the person(s) accepting the Addendum has sufficient authority to bind the firm. Each document must be downloaded and read before continuing.

Once the Addendum has been downloaded it can only be accepted by the same Panel Link Membership Manager if the version has not changed since the initial download. New users or Addendum changes will require a further download.

 [Panel Membership Terms and Conditions](#)

☒ I have read and agree to the terms of the Addendum

 [Virgin Money Addendum](#)

☒ I have read and agree to the terms of the Addendum

[Submit addendums](#)

The Dashboard will alert you when your professional indemnity insurance certificate is due to expire or when your practising certificates are due to expire.

Indemnity Insurance Certificate
expiry date

30/10/16

[Upload new document](#)

Upload new document

New documents can be uploaded into the system. The files can either be dragged into the drop section or you can browse and locate the document. Before the document can be uploaded onto the system the expiry date must be provided.

Indemnity Insurance Certificate

Certificate must include insured value per claim and name of insurer.

Drop a file here to upload. Alternatively select 'Browse'.

[Browse](#)

Expiry Date

[Upload](#)

Click to hide document(s) >

■ Active
 ■ Expiring soon
 ■ Expired
 ■ Pending

Documents	Created	Expiry	
Test.pdf	30/09/2016	19/10/2016	Download
Test.pdf	30/09/2016	24/10/2017	Download
Test.pdf	19/09/2016	12/09/2018	Download
Test.pdf	16/09/2016	13/09/2017	Download
Test.pdf	16/09/2016	28/09/2016	Download
Test.pdf	16/09/2016	21/09/2016	Download
Test.pdf	16/09/2016	10/09/2020	Download

Update details

If any of the details that you provided upon application change you can inform us of the update via this section of the system. Once an update has been submitted for review this section is locked to prevent further updates. If you need to make an amendment during this time please email lenderpanels@lms.com

Update Panel Membership

Set out below is the information that we hold for your law firm. If any of this information changes, you must inform us immediately. Please make the necessary changes below and click on the 'Confirm Update' button at the bottom of the page. Multiple updates can be made at the same time.

The new information will be reviewed by a member of the Supplier Management Team. While this review is taking place, further changes cannot be made to your membership information.

	Purchase completions in the last 12 months (with any lender) *	Professional Indemnity Insurance Limit of Indemnity (per claim) *	Accreditations / Regulation *	Number of Partners/ Directors/Principles *
Your Firm Details	<input type="text" value="1000"/>	<input type="text" value="6000000"/>	CQS <input checked="" type="checkbox"/> SRA <input checked="" type="checkbox"/> CLC <input type="checkbox"/> LSS <input type="checkbox"/> LSNI <input type="checkbox"/>	<input type="text" value="6"/>
Is your Professional Indemnity Insurance provided by a rated insurer? *	<input checked="" type="radio"/> Yes <input type="radio"/> No		Insurer Name * <input type="text" value="Rated"/>	
Firm name and address details				
Contact Name *	<input type="text" value="Louise"/>			
Registered Company Name *	<input type="text" value="Lemmings"/>			

You are able to save your progress as you make amendments, but the information will not be sent for review until you click 'Confirm Update' at the bottom of the page.

Save Progress

You are able to add additional branches to your application or inform us of closed branches via the update section.

Do you have any other branches which undertake conveyancing?

☒ Yes ☐ No

Please give details of your other branches:

Tiptown

Edit Remove

Add New Branch

Renew panel membership

Every 12 months each law firm must reapply for lender panel membership. You will receive notice of this one month prior to expiry via email.

Panel membership expiry date

11/10/16

Check panel membership

Renew panel membership

You must check that all of the information we hold for your firm is still valid and provide any applicable updates to the information.

Renew Panel Membership

Below set out the current information we hold about your firm. To remain active on the panels that LMS manage, we need to verify that the information below is still correct. Please review this information carefully and provide us with any necessary updated information.

Once you have done this, please re-confirm your acceptance to the Panel Terms and Conditions and relevant Addendum document(s) then click the Confirm Renewal button to submit your application. We are entitled to assume that the person(s) completing this form and accepting the Panel Membership Terms and Conditions has sufficient authority to bind the firm.

	Purchase completions in the last 12 months (with any lender) *	Professional Indemnity Insurance Limit of Indemnity (per claim) *	Accreditations / Regulation *	Number of Partners/ Directors/Principles *
Your Firm Details	<input type="text" value="1000"/>	<input type="text" value="6000000"/>	CQS <input checked="" type="checkbox"/> SRA <input checked="" type="checkbox"/> CLC <input type="checkbox"/> LSS <input type="checkbox"/> LSNI <input type="checkbox"/>	<input type="text" value="6"/>
Is your Professional Indemnity Insurance provided by a rated insurer? *	<input checked="" type="radio"/> Yes <input type="radio"/> No		Insurer Name * <input type="text" value="Rated"/>	
Firm name and address details				
Contact Name *	<input type="text" value="Louise"/>			
Registered Company Name *	<input type="text" value="Lemmings"/>			

Documentation can be checked and if applicable new documents supplied.

Document Types

Files uploaded must be one of the following types: pdf, jpg, jpeg, doc, docx

Current Practising Certificate

We require certificates for all conveyancers and at least 2 partners/directors/principals

Drop a file here to upload. Alternatively select 'Browse'.

Browse

Expiry Date Please Select Upload

Click to hide document(s) >

Active Expiring soon Expired Pending

Documents	Created	Expiry	
Test.pdf	19/09/2016	05/01/2017	Download
Test.pdf	19/09/2016	05/01/2017	Download
Test.pdf	19/09/2016	05/01/2017	Download
Test.pdf	19/09/2016	05/01/2017	Download

Indemnity Insurance Certificate

All Terms and Conditions and Addendums must be reaccepted prior to confirming your renewal.

Panel addendums available to download and read

By ticking the checkbox(es) below you confirm that you have read and agree to each lenders Addendum. We are entitled to assume that the person(s) accepting the Addendum has sufficient authority to bind the firm. Each document must be downloaded and read before continuing.

Once the Addendum has been downloaded it can only be accepted by the same Panel Link Membership Manager if the version has not changed since the initial download. New users or Addendum changes will require a further download.

 Panel Membership Terms and Conditions	<input type="checkbox"/> I have read and agree to the terms of the Addendum
 Buckinghamshire Building Society Addendum	<input type="checkbox"/> I have read and agree to the terms of the Addendum
 Marsden Building Society Addendum	<input type="checkbox"/> I have read and agree to the terms of the Addendum
 Metro Bank Addendum	<input type="checkbox"/> I have read and agree to the terms of the Addendum
 Virgin Money Addendum	<input type="checkbox"/> I have read and agree to the terms of the Addendum

Clicking the button below will send your application for consideration. We are entitled to assume that the person(s) completing this form and accepting the Panel Membership Terms and Conditions has sufficient authority to bind the firm.

Confirm Renewal

LMS Account Checker

You are able to log-in to LMS Account Checker from the landing page. To be able to check account information a LMS case reference number is required.

Welcome to AccountChecker

- This service allows you to check the account number and sort code of a law firms client account before you send them any money. Client account information is checked using the details provided to LMS by the law firms and is compared against those details when you perform a search.
- You will need to provide the name and address of the law firm. We will then present you with any law firms that match the details you have supplied. If we do not hold the details for the law firm you are searching you will need to check their information via an alternative route.
- Once you have selected the law firm you wish to search against, input the account number and sort code that you hold for the law firm and we will check information against the details held by us.

Search law firm

Law Firm Name*	<input type="text"/>
Law Firm Postcode*	<input type="text"/> <input type="text"/>
LMS Case Reference*	<input type="text"/>
Submit details	<input type="button" value="Submit"/>

Once you have searched for the law firms you will be provided with an option to select a law firm

- This service allows you to check the account number and sort code of a law firms client account before you send them any money. Client account information is checked using the details provided to LMS by the law firms and is compared against those details when you perform a search.
- You will need to provide the name and address of the law firm. We will then present you with any law firms that match the details you have supplied. If we do not hold the details for the law firm you are searching you will need to check their information via an alternative route.
- Once you have selected the law firm you wish to search against, input the account number and sort code that you hold for the law firm and we will check information against the details held by us.

Law firm details

We have found the following details	<input type="text" value="Please Select"/>
Not what you are looking for?	<input type="button" value="Search Again"/>

Once you have selected the law firm it will present you have a result which can be viewed on screen and downloaded for your reference.

- This service allows you to check the account number and sort code of a law firms client account before you send them any money. Client account information is checked using the details provided to LMS by the law firms and is compared against those details when you perform a search.
- You will need to provide the name and address of the law firm. We will then present you with any law firms that match the details you have supplied. If we do not hold the details for the law firm you are searching you will need to check their information via an alternative route.
- Once you have selected the law firm you wish to search against, input the account number and sort code that you hold for the law firm and we will check information against the details held by us.

Result



Bank details for The Law Limited (CH63 9HQ)
cannot be matched. Please contact the law firm.

Lender Documents

Select Lender Documents to view mortgage offer enclosure documents hosted by LMS.

Lender Documents

By clicking on lender names below you are able to view or download mortgage offer enclosures and legal documents. These documents are subject to change and should not be saved locally for future use.

▶ Bluestone Mortgages Limited

▶ Buckinghamshire Building Society

▶ Hinckley & Rugby Building Society

▶ Marsden Building Society

▶ Metro Bank

▶ Monmouthshire Building Society

▶ Virgin Money

If you are unable to locate a particular document please email [Supplier Management Team >](#)

Admin

Depending on your user level you may be able to manage Conveyancer users using the Admin option.

In this section of Conveyancer Zone you can:


- Add users
- Update users
- Change permission levels
- Disable users

You are responsible for ensuring that only users who should be able to access the system have active accounts.

Search Users

This page will show users for your law firm which you can then search using the username or surname.

You are able to sort the data by clicking on the headers, by default 10 users will display per page and you can navigate pages at the bottom of the screen.

Search users
 Click to expand/collapse

Search user by:

Username

Surname

Search

The wildcard * can be used for searching purposes. For example, "b*l" will return Ball, ball, Bell and Bill.

Username	Name	Group/type	Enabled	Expired	Last logon	
SIM001CB	Brown, Chris	Panel Link Membership Man...	Enabled	No	Never	Update user
SIM001DC	Clark, Danielle	Panel Link Standard User	Enabled	No	16/10/2016	Update user
SIM001SF	Faircloth, Simon	Panel Link Membership Man...	Enabled	No	17/10/2016	Update user
SIM001NG	Grace, Nicola	Panel Link Membership Man...	Enabled	No	16/10/2016	Update user
SIM001BH	Harper, Ben	Panel Link Membership Man...	Enabled	No	16/10/2016	Update user
SIM001DJ	Jones, Darren	Panel Link Membership Man...	Enabled	No	16/10/2016	Update user
SIM002DJ	Jones, Darren	Panel Link Membership Man...	Enabled	No	16/10/2016	Update user
SIM001JM	Malpass, Jamie	Panel Link Membership Man...	Enabled	No	16/10/2016	Update user
SIM001MP	Phone-Mast, Massive	Panel Link Standard User	Enabled	No	16/10/2016	Update user
SIM001LS	Sturman-Morrle, Louise	Panel Link Membership Man...	Enabled	No	17/10/2016	Update user

«
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1
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Showing 1 to 10 of 12 entries

If a user is not enabled and needs to be reactivated then the case and user administrator will need to contact LMS IT Support.



Update User

This allows you to update existing users. If you wish to remove access from a user set the 'User Expiry Date' in the past.

Update user

 Click to expand/collapse

You are responsible for maintaining users and should ensure that access is removed for anyone who no longer requires it.

Username	SIM001CB
User creation date	12/10/2016 00:00:00
Title*	<input type="text" value="Mr"/>
First name*	<input type="text" value="Chris"/>
Surname*	<input type="text" value="Brown"/>
Memorable question*	<input type="text" value="Mother's Maiden Name"/>
Memorable answer*	<input type="text" value="Kirhfm8"/>
Telephone number*	<input type="text" value="0343"/> <input type="text" value="2210600"/>
Email address* 	<input type="text" value="chris.brown@lms.com"/>
Confirm email*	<input type="text" value="chris.brown@lms.com"/>
User expiry date*	<input type="text" value="19/10/2016"/>
Group membership* 	<input type="text" value="Panel Link Membership Manager"/>

Panel Link Membership Manager – Update law firm's information & client account details, renew panel membership, accept T&C's on behalf of law firm; includes case and user administrator user access

Update user

Update User Password

If a user has forgotten their password you can set a new password for them which can be used as a temporary password, the user will be prompted to update this the first time they log in.

Password details

Use the fields in this section to set a temporary password for the user. The user will be prompted to set their own password when next logging in. It is your responsibility to inform the user of the temporary password you enter.

Your password must contain the following:

8 - 40 characters

At least one capital letter

At least one special character (e.g ~ # ` ! @ \$ % ^ & * +)

At least one number

New password*	<input type="text"/>
Confirm password*	<input type="text"/>

Update password

Add new user


You can add a new user by providing a small amount of information as shown in the interface. You will not be able to create or update a user to an access level higher than your own.

There are three access levels available to you:

- **Panel Link Case and User Administrator** – Users may access all cases within offices to which the user is assigned. Additionally they may administer other system users.
- **Panel Link Membership Manager** – Update law firm's information & client account details, renew panel membership, accept T&C's on behalf of law firm; includes case and user administrator user access.
- **Panel Link Standard User** – Users may access all cases within offices to which the user is assigned. Users in this group cannot administer other users.



You must inform the new user of their username and password to allow them to login. They will be prompted to provide a new password on their first login. You must also inform the new user of the memorable question and answer as this will be used to verify the user if they contact LMS IT Support.

Add new user

 Click to expand/collapse

You are responsible for maintaining users and should ensure that access is removed for anyone who no longer requires it.

Note: Fields marked with an * are required fields.

Username	Automatically generated
Title*	<input type="text" value="Select"/>
First name*	<input type="text"/>
Surname*	<input type="text"/>
Memorable question*	<input type="text" value="Select"/>
Memorable answer*	<input type="text"/>
Telephone number*	<input type="text"/> <input type="text"/>
Email address* 	<input type="text"/>
Confirm email*	<input type="text"/>
Group membership* 	<input type="text" value="Select"/>

Use the fields in this section to set a temporary password for the user. The user will be prompted to set their own password when next logging in. It is your responsibility to inform the user of the temporary password you enter.

Your password must contain the following:

8 - 40 characters

At least one capital letter

At least one special character (e.g ~ # ` ! @ \$ % ^ & * +)

At least one number

New password*	<input type="text"/>
Confirm password*	<input type="text"/>

Assign office

The new user will be assigned to office Simon Test Law Firm - Ellesmere Port

[Add new user](#)

Manage Password

This option allows you to manage your password. Conveyancer Zone requires that you change your password every thirty days.

The password must contain:

- 8-40 characters
- Capital letter
- Special character
- Number

Manage password

Your password must contain the following:

8 - 40 characters

At least one capital letter

At least one special character (e.g ~ # ` ! @ \$ % ^ & * +)

At least one number

Old password

New password

Confirm password

Update

Contacting LMS

General Enquiries

0343 221 0643

IT Support

For technical support and system access

support@lms.com

0343 221 0610

Charge Registration

About your post completion obligations

chargeregistration@lms.com

Supplier Management Team

About your panel membership

lenderpanels@lms.com

0343 221 0643