HOUSING & DEVELOPMENT BOARD

INSTRUCTION MANUAL FOR ESTATE AGENT TOOLKIT

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The tips icons in this manual point out information that you don't want to miss.

Chapter 1: Getting Started

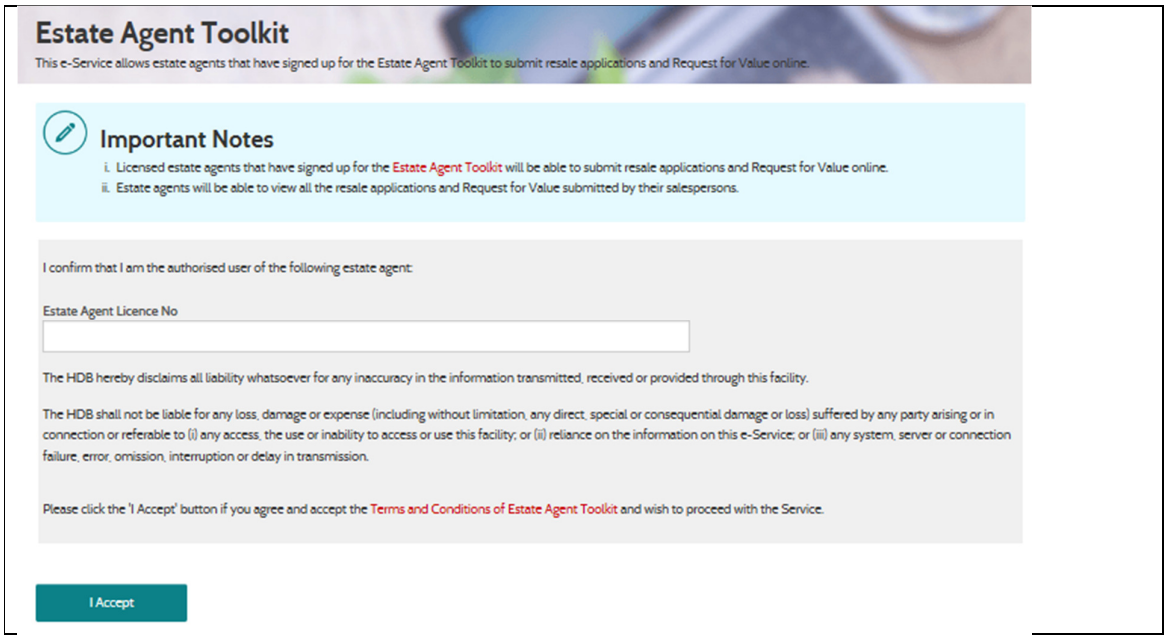
1.1 Logging in to Estate Agent Toolkit

(a) The Estate Agent Toolkit e-Service is availed on the HDB InfoWEB >> e-Services >> Estate Agent Toolkit at www.hdb.gov.sg

(b) Enter the **Estate Agent Licence No.** and click **I Accept** to proceed.

(c) If your estate agent has signed up for the Estate Agent Toolkit, you will be prompted to key in your CorpPass.

(d) Use the **Back** and **Next** button within the Estate Agent Toolkit for navigation. **Do not** use the Back or Forward button at the browser for navigation.

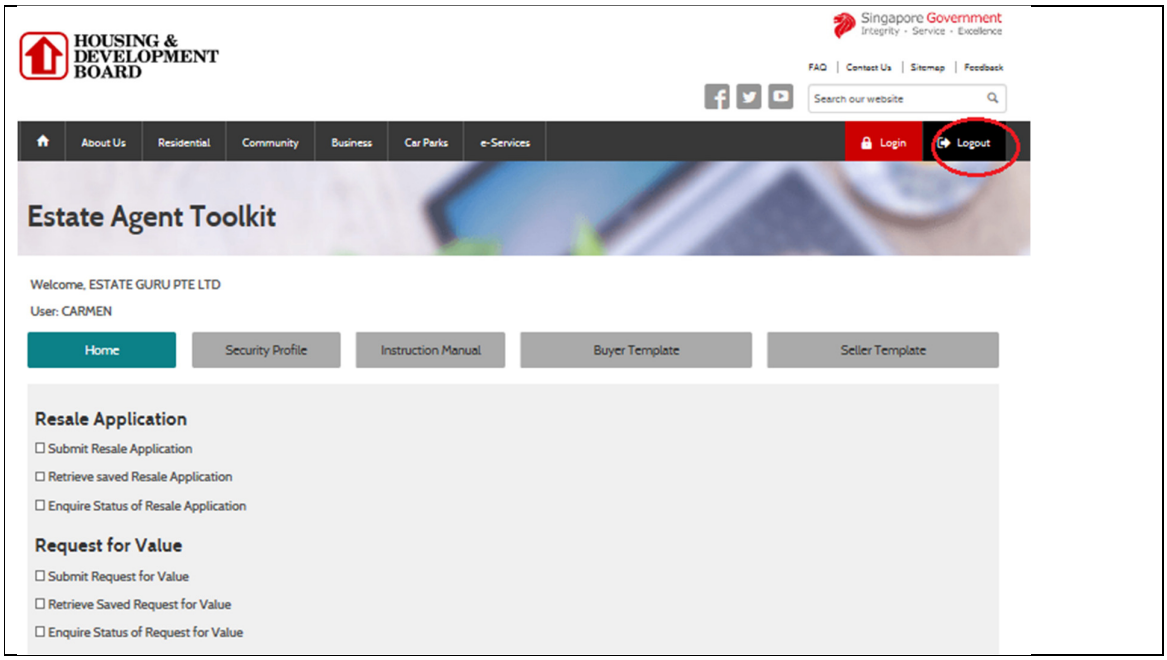




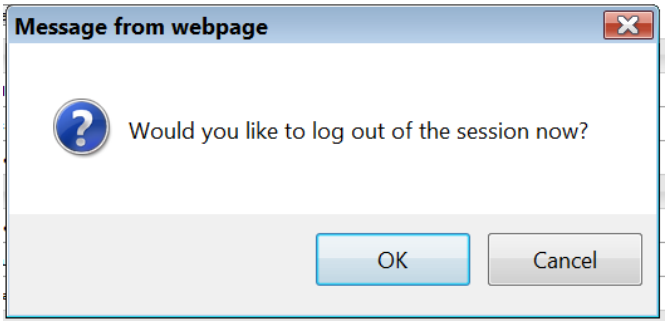
If you encounter an error after CorpPass, it could mean that your KEO has not granted you the access to the Estate Agent Toolkit. Your KEO may refer to Chapter 2 for the steps in granting access to users.

1.2 Logging out of Estate Agent Toolkit

(a) To logout, you may click the **Logout** button located at the top right-hand corner of the screen.



(b) Click **OK** and you will be logged out of the Estate Agent Toolkit.





To ensure that only authorised users access the Estate Agent Toolkit at any time, please remember to logout once you have completed your transaction.

Chapter 2: User Access Maintenance

The Estate Agent Toolkit provides two levels of access control for the KEOs to manage the estate agent. Users with first level access are called the **Admin Users** while users with second level access are called the **General Users**.

2.1 Type of Users

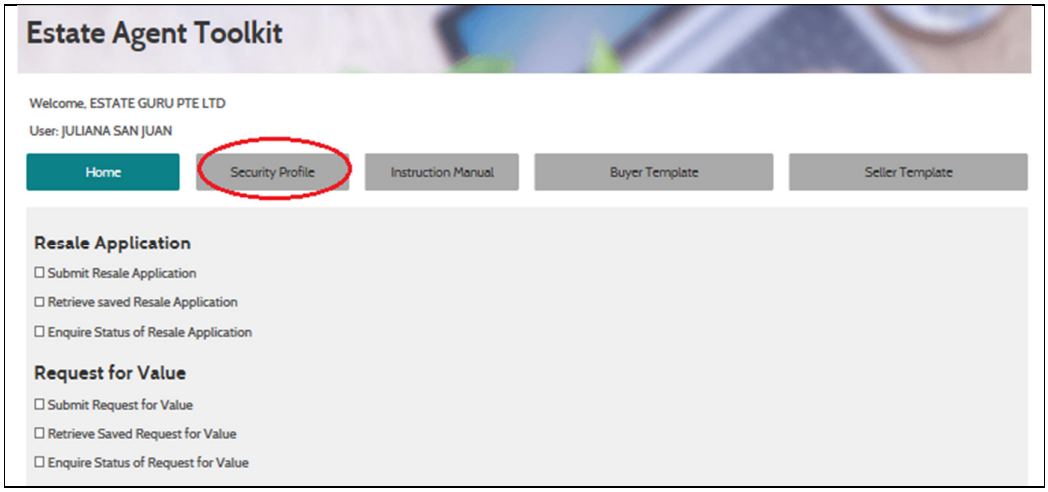
The KEO may nominate up to **2 Admin Users** and **5 General Users** to perform the following functions in the capacity of the estate agent.

Functions	Access of Admin Users	Access U
Submit Resale Application and Request for Value	✔	✔
View Status of Resale Application and Request for Value	✔	✔
Book and Change the First Appointment Date	✔	✔
View Resale Applications Summary Report, Request for Value Summary Report, Daily Usage Report, GIRO Deduction Report and User Access Report	✔	
Update Estate Agent Information	✔	

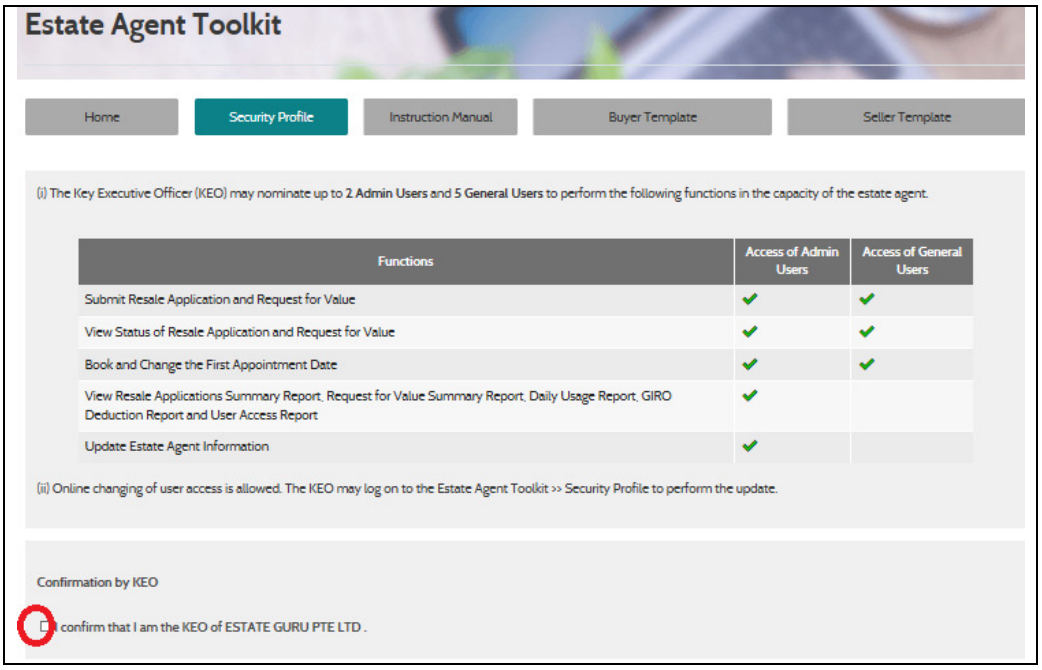
The Admin Users, being nominated by the KEO, may also review the access control of the 5 General Users.

2.2 Logging in to Security Profile by KEO

(a) After you (KEO) have logged in successfully via CorpPass, click on the **Security Profile** tab.

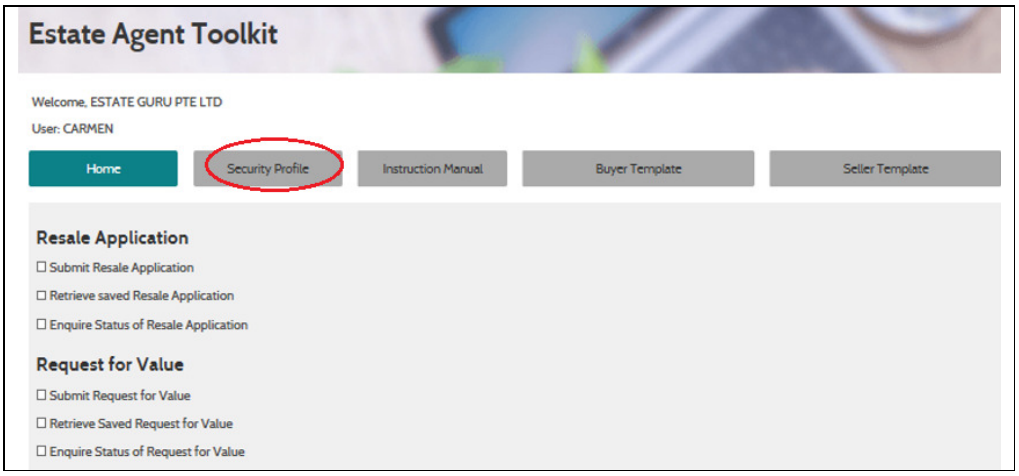


(b) Confirmation by KEO

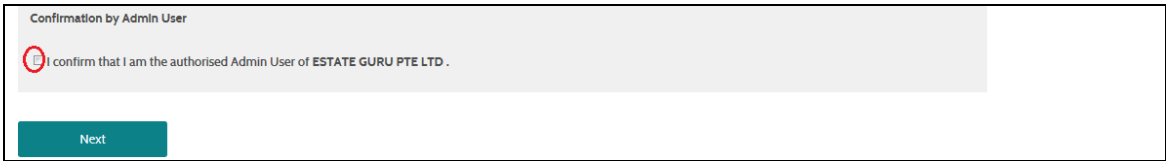


2.3 Logging in to Security Profile by Admin Users

(a) After you have logged in successfully via SingPass, click on the **Security Profile** tab.



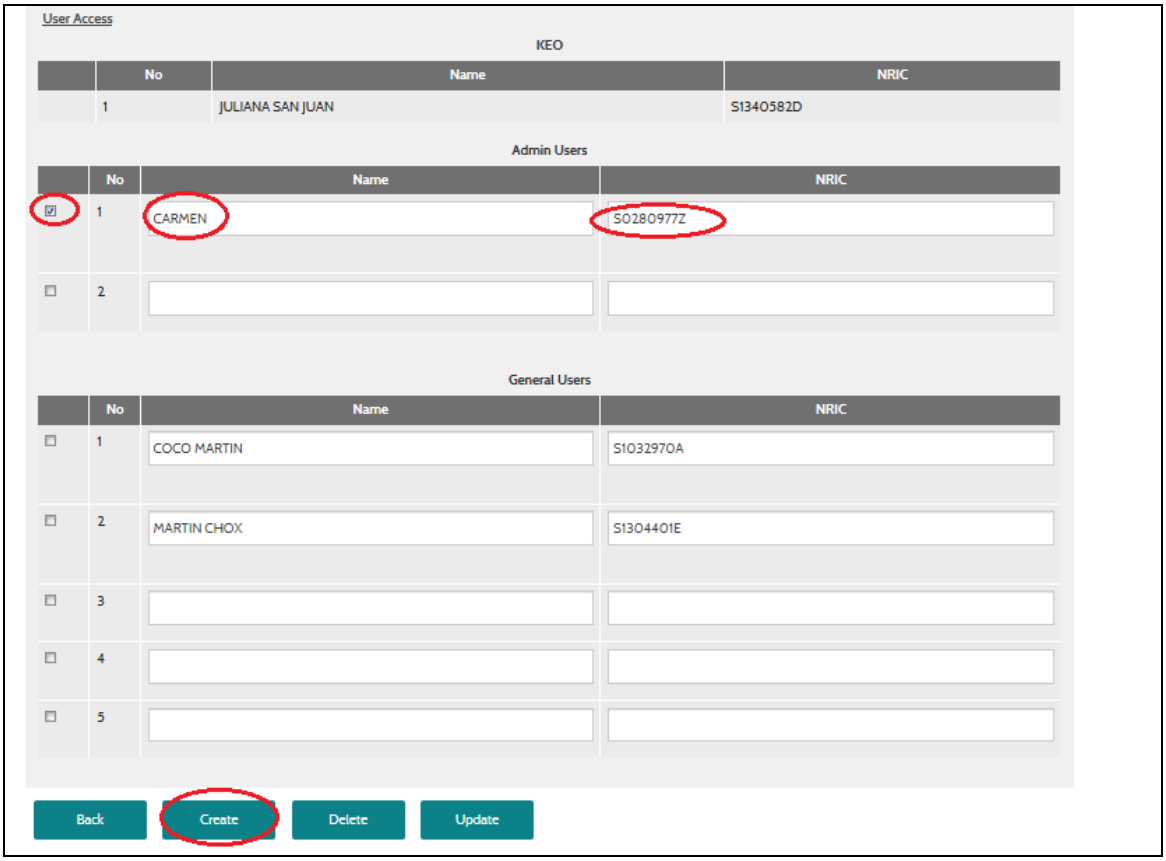
(b) Confirmation by Admin User



2.4 Creating of Users

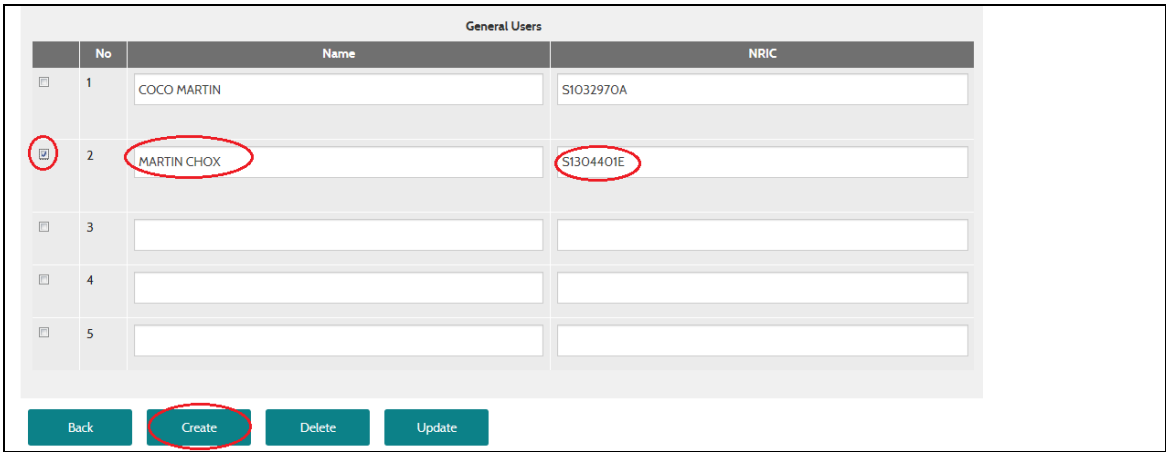
(a) Creating of Admin Users by KEO

Check the box, enter the name & NRIC of the Admin user and click **Create**.



(b) Creating of General Users by KEO or Admin User

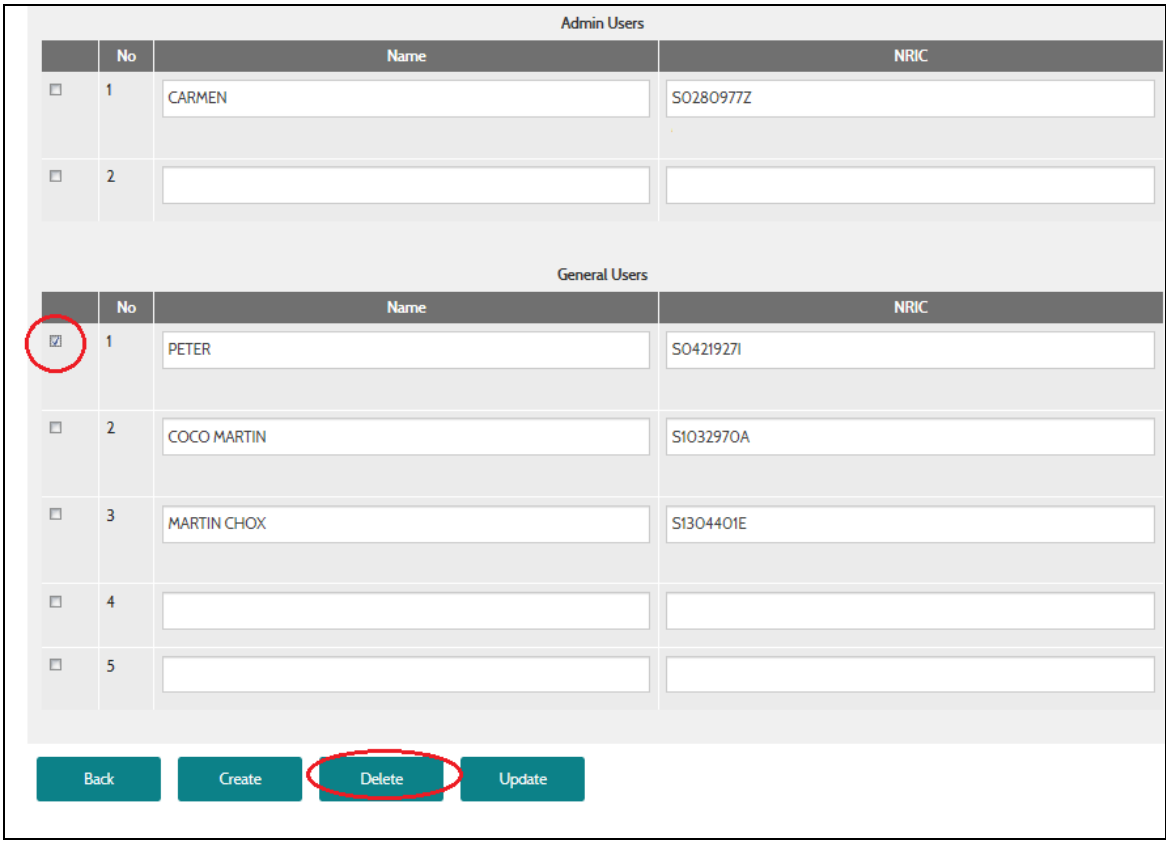
Check the box, enter the name & NRIC of the General user and click **Create**.



2.5 Deleting of Users

(a) Select the checkbox of the user that you want to delete.

(b) Click **Delete**.



(c) You may review the User Access List via the 'View User Access Report' function on the **Home** Page.

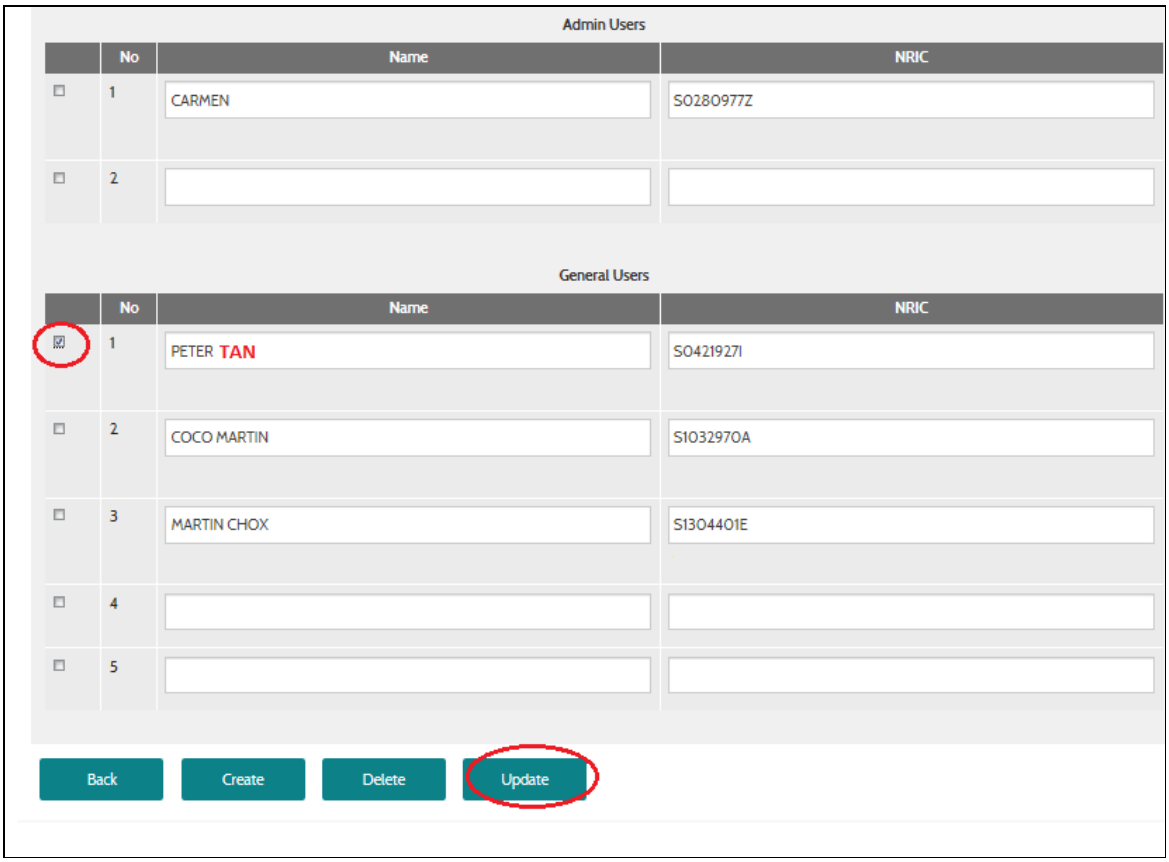


2.6 Updating of Users

(a) Select the checkbox of the user that you want to update.

(b) Update the name of the user

(c) Click **Update**.





The **Update** function allows you to update the name of the user. If you want to amend the NRIC of the user, please delete the user (refer to 2.5) and create the user (refer to 2.4) once again.

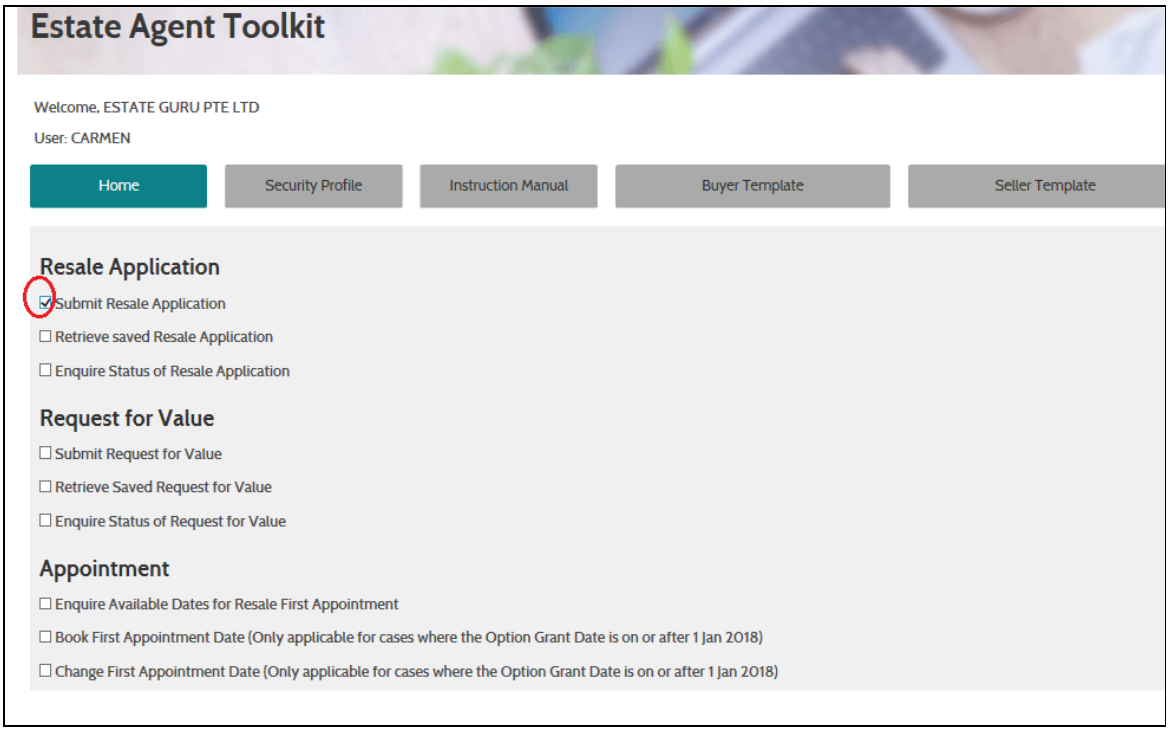
Chapter 3: Resale Application

3.1 Submitting an application for Buyers

To submit the resale application for buyer, you will need the following information:

- Resale Flat Address
- Option to Purchase (OTP) details (please refer to the OTP that the buyers and sellers have executed)
- Personal Particulars of all buyers/ occupiers
- Softcopy personal documents of buyers/ occupiers
- Softcopy income documents (if applying for CPF Housing Grant)

(a) Select the checkbox “Submit Resale Application” and click **Next**.



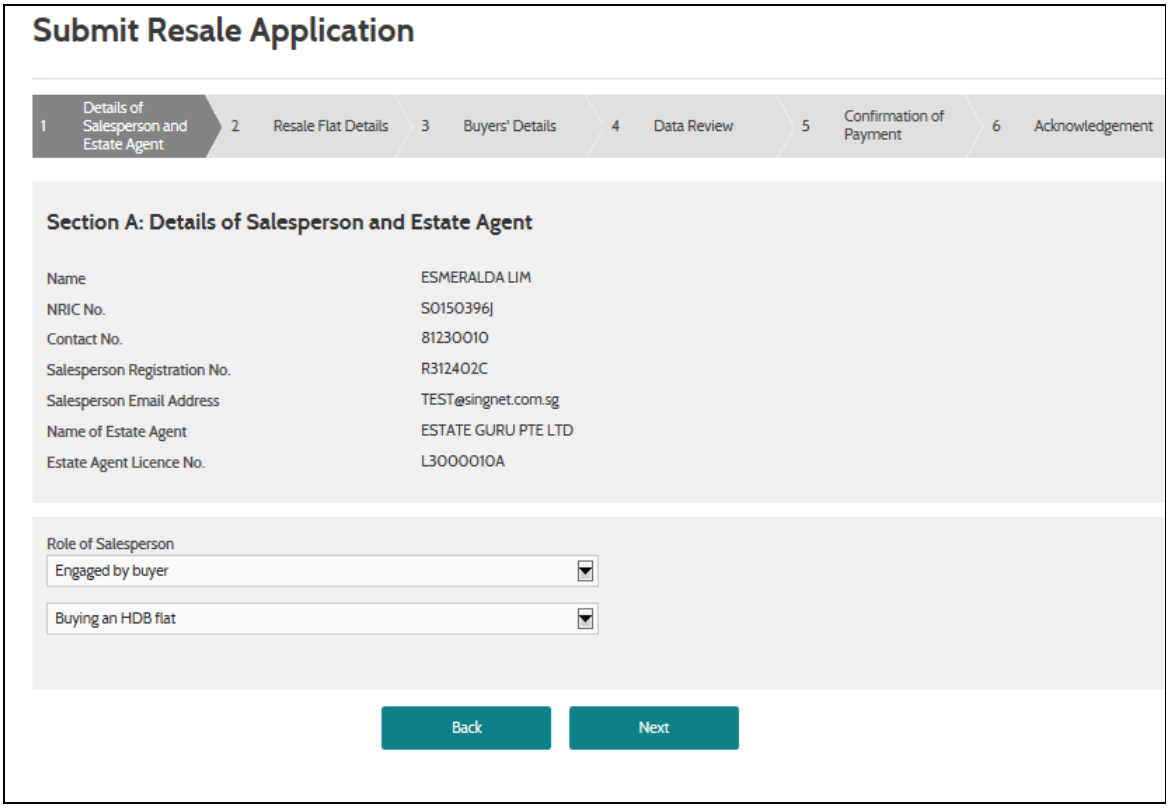
(b) Key in the NRIC of the salesperson handling the purchase transaction and click **Next**.



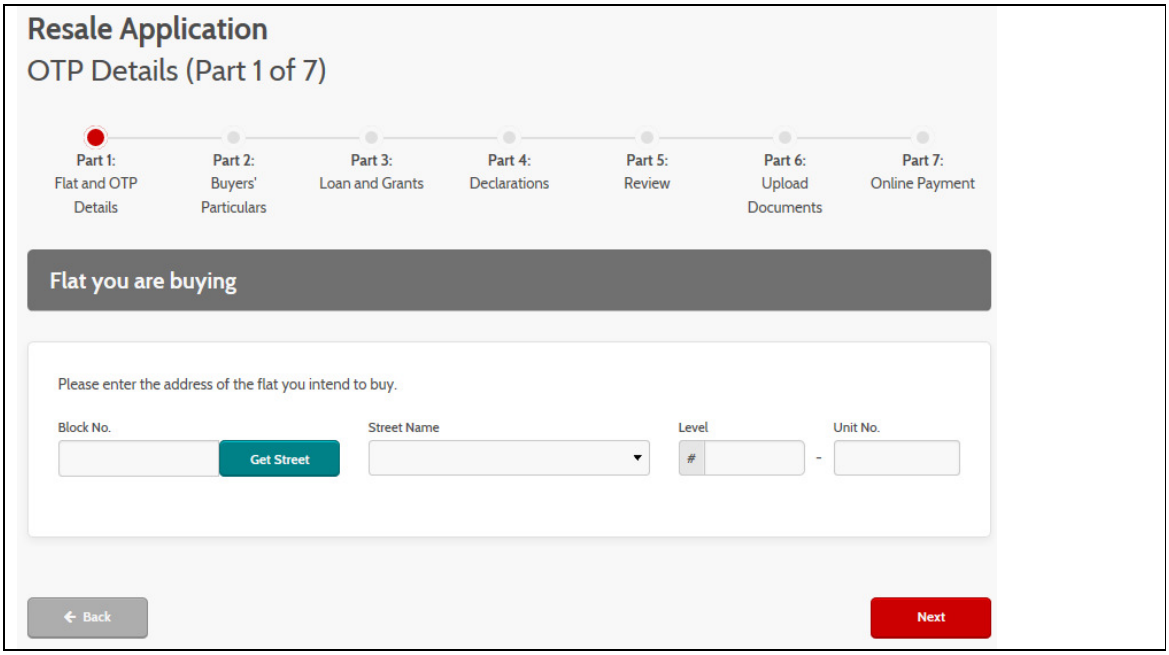
(c) The particulars of the salesperson will be retrieved from CEA and displayed accordingly.

(d) Select the role of the salesperson.

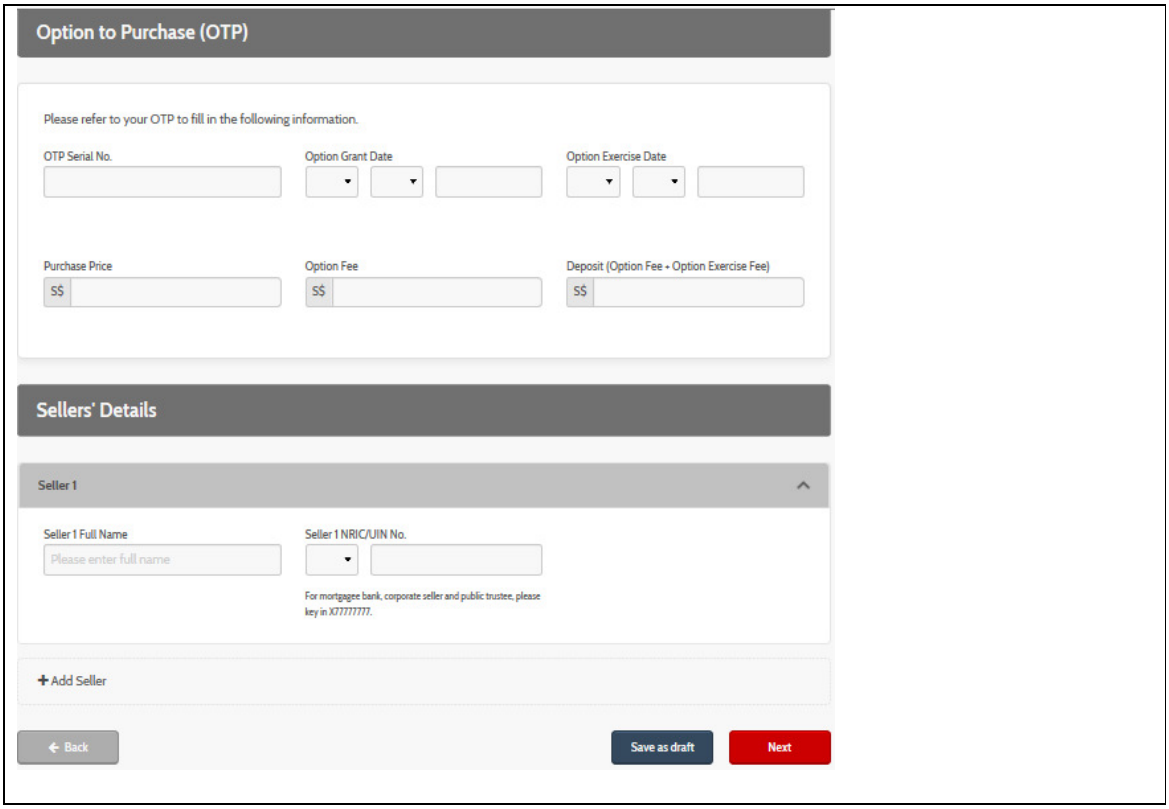
(e) Verify all the information and click **Next**.



(f) Under Part 1 of 7, key in the block number and click **Get Street**. Select the correct street name from the drop-down list. Click **Next** once the complete resale flat address has been keyed in.



(g) Under this section, key in the Option to Purchase (OTP) details.





The system will match the following information provided by the buyer and seller in their separate applications:

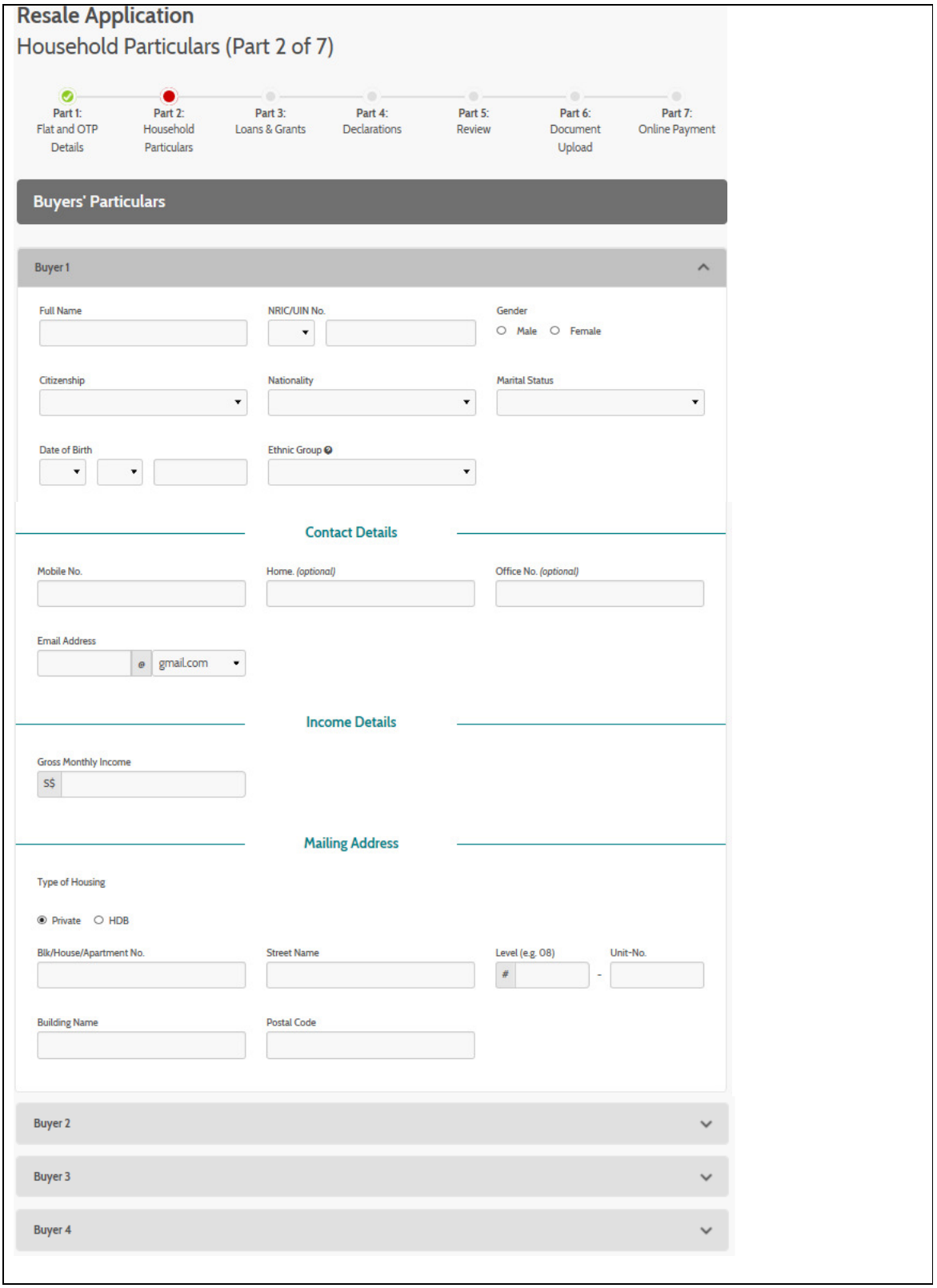
(i) Resale Flat Address

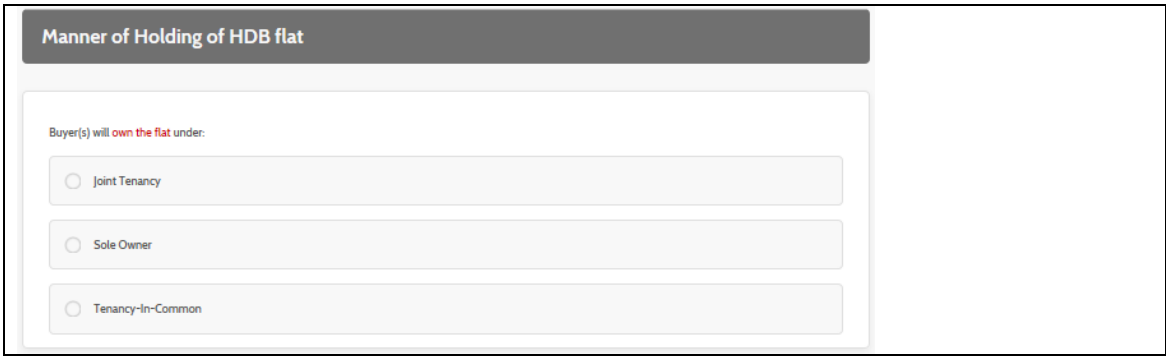
(ii) Option To Purchase Details (Resale Price, Option Fee, Deposit, Option Grant Date, Option Exercise Date, OTP Serial No.)

Both buyers and sellers have to provide consistent information relating to the resale transaction. If the second party receives the error message **"The information provided by buyers and sellers are different"**, it means that the information provided by the second party does not tally with that provided by the first party. You have to recheck the OTP information you have provided. When filling up this portion, please refer to the Option To Purchase that both buyers and sellers have executed.

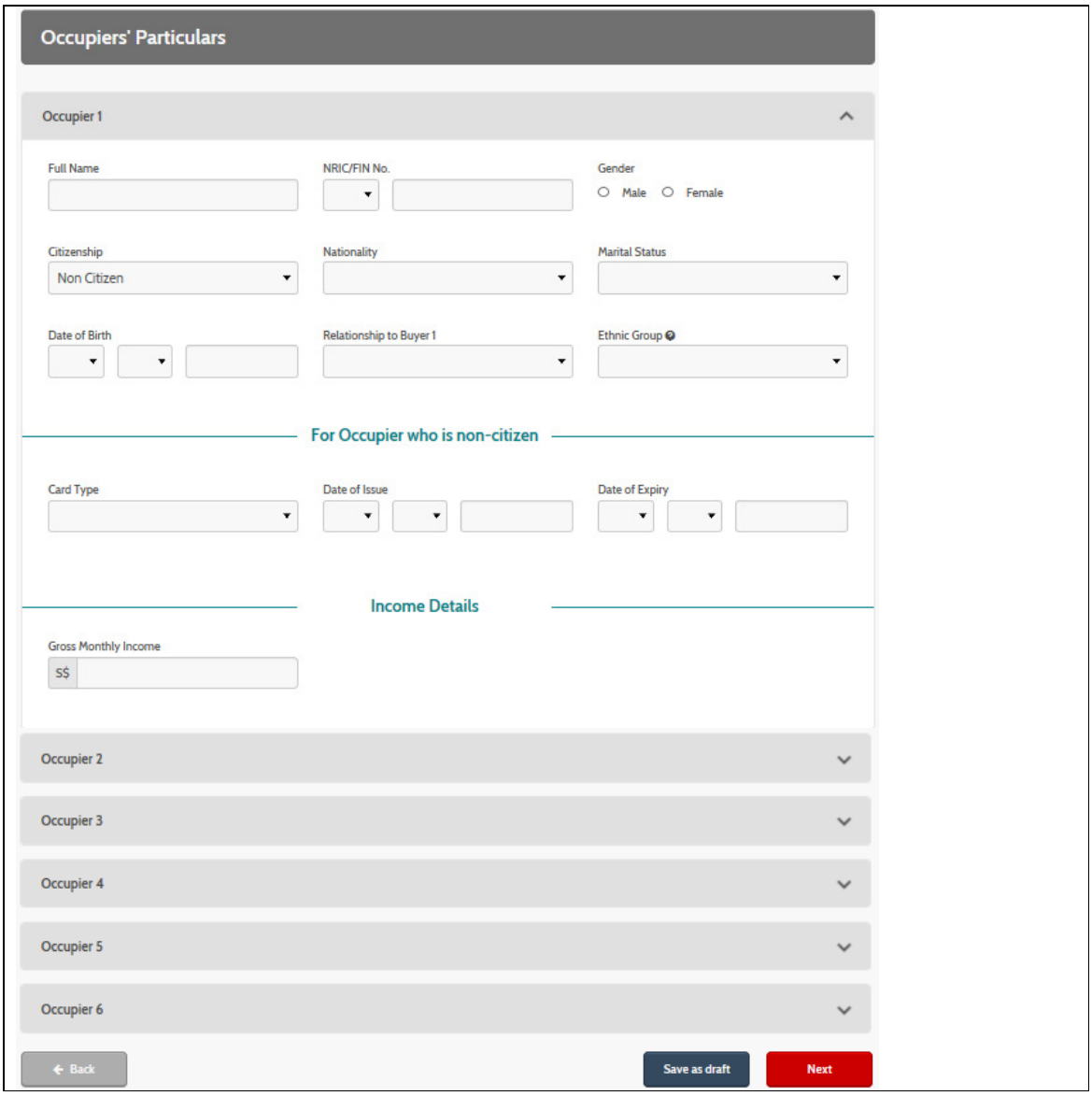
In the situation where the error is caused by the first party, you will have to inform HDB. You may contact our Customer Service Officer 6490 3626 (Mon – Fri from 8.30am to 5.30pm) to seek assistance for your submission of the resale application.

(h) Under Part 2 of 7, key in the particulars of all buyers.



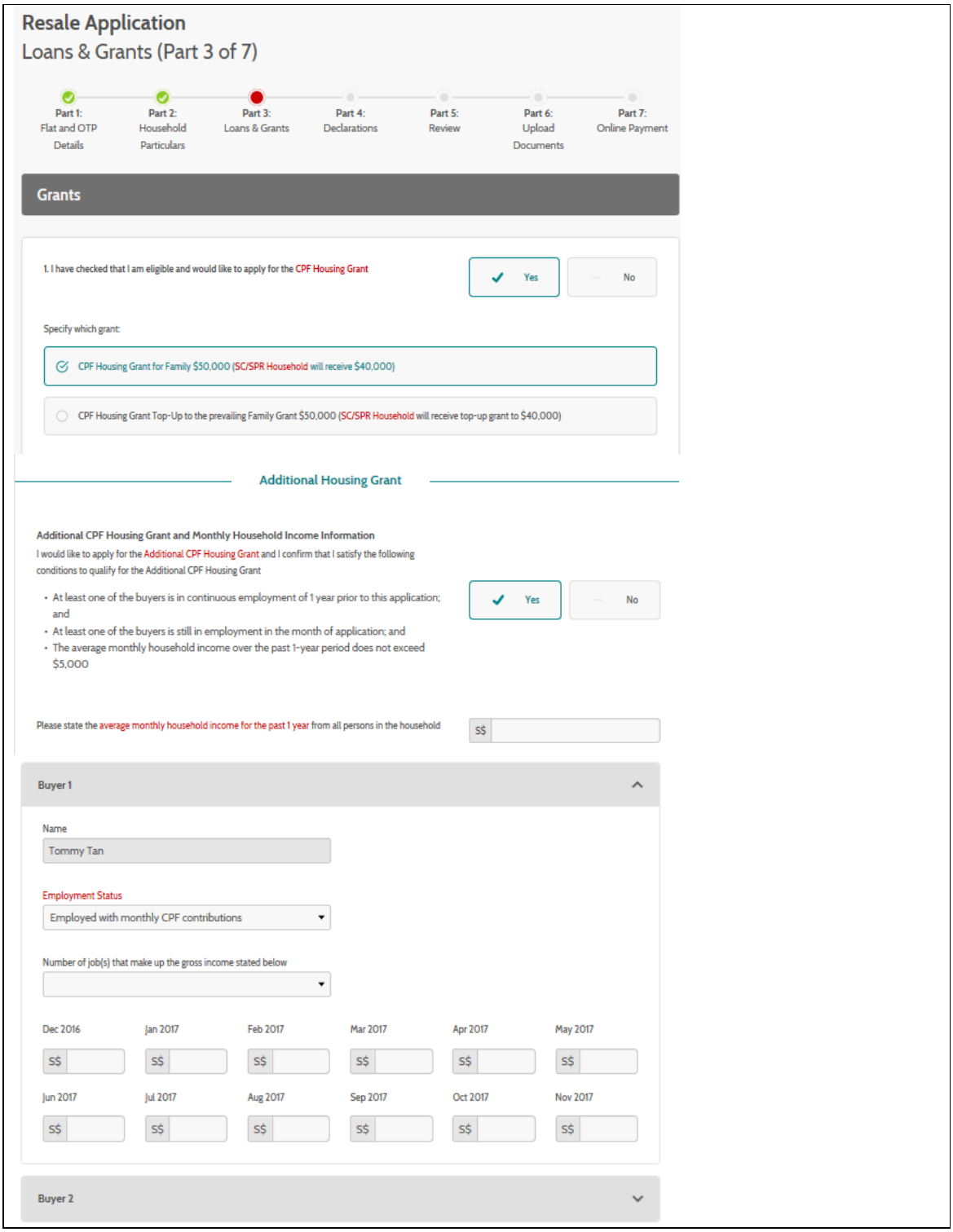


(i) Under this section, key in the particulars of all occupiers (if any).



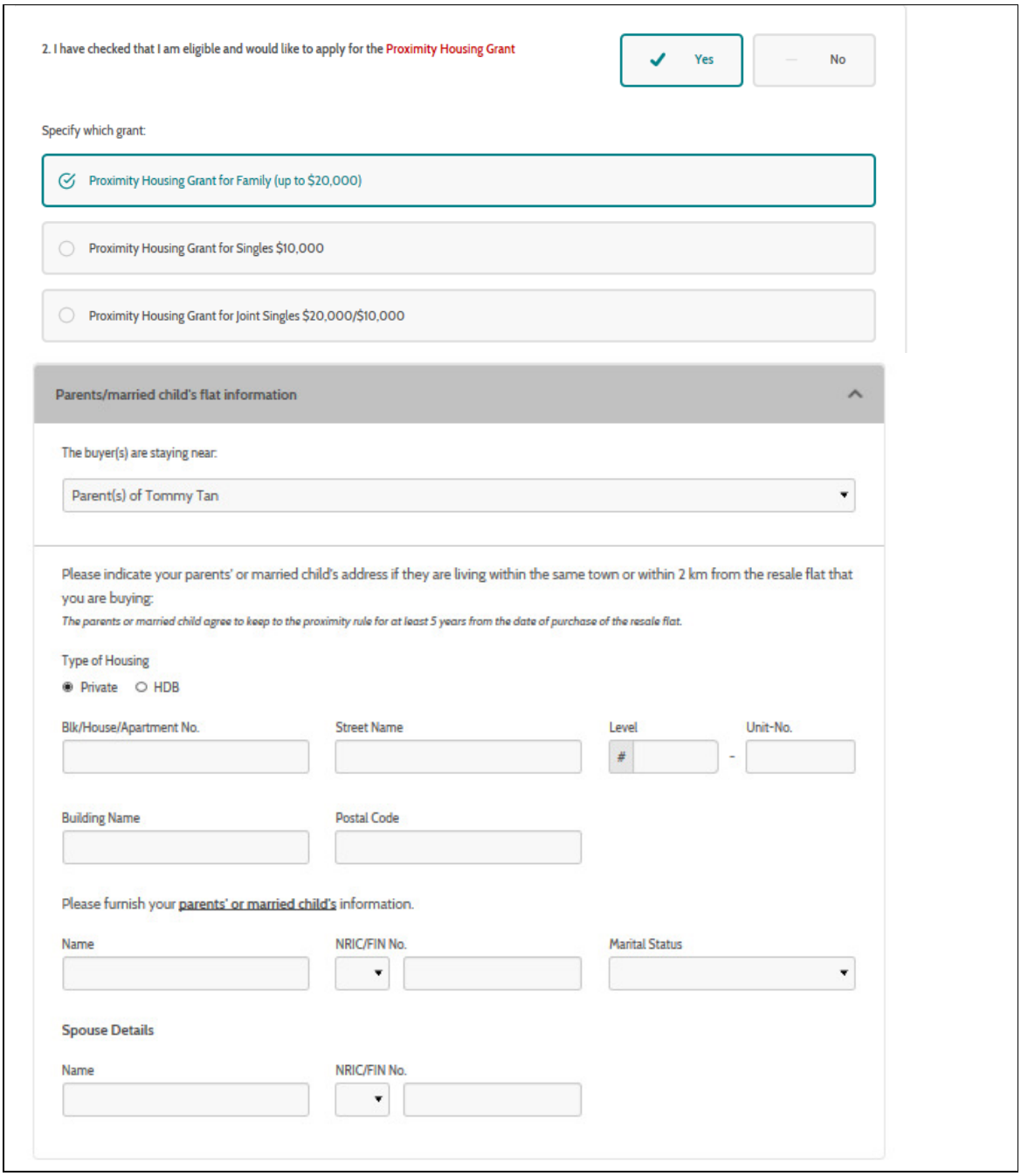
(j) If the buyer wants to apply for the CPF Housing Grant, please select **Yes**. Based on the employment status, it is mandatory to provide the past monthly incomes of the buyer(s) and occupier(s) listed in the application.

Please also indicate the number of job(s) that made up the monthly incomes.

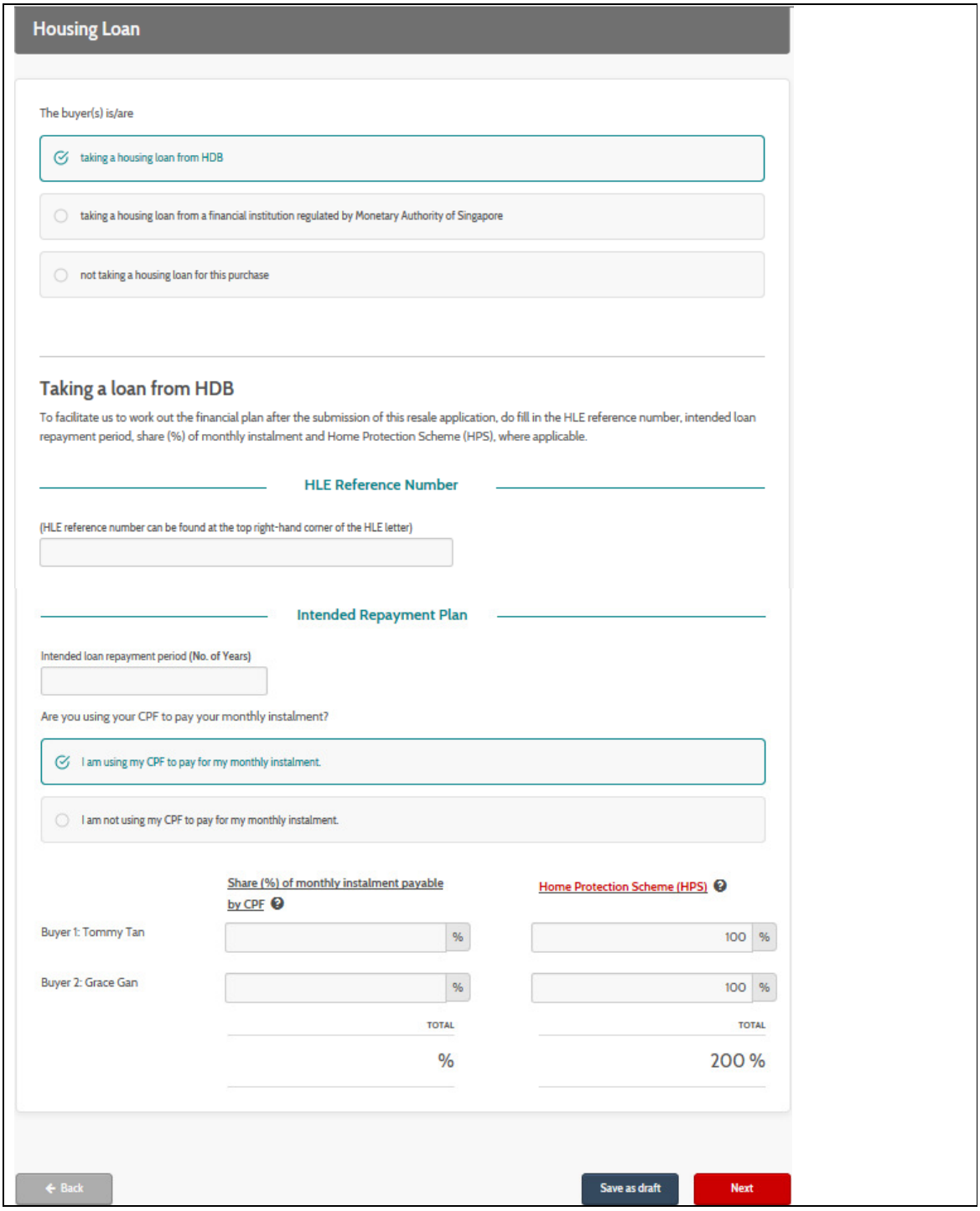


(k) If the buyer wants to apply for the Proximity Housing Grant (PHG), please select **Yes**. If the buyer is applying for PHG for Single Citizen or PHG for Joint Singles, parents* must be included in the application as co-applicants or occupiers.

* At least one of the parents must be a Singapore Citizen or SPR.

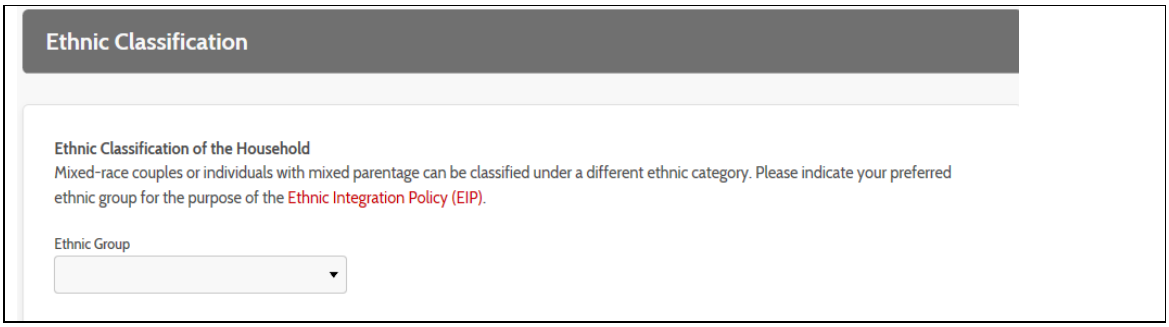


(l) Under this section, please indicate whether the buyer is taking a housing loan from HDB or Bank/ Financial Institution.

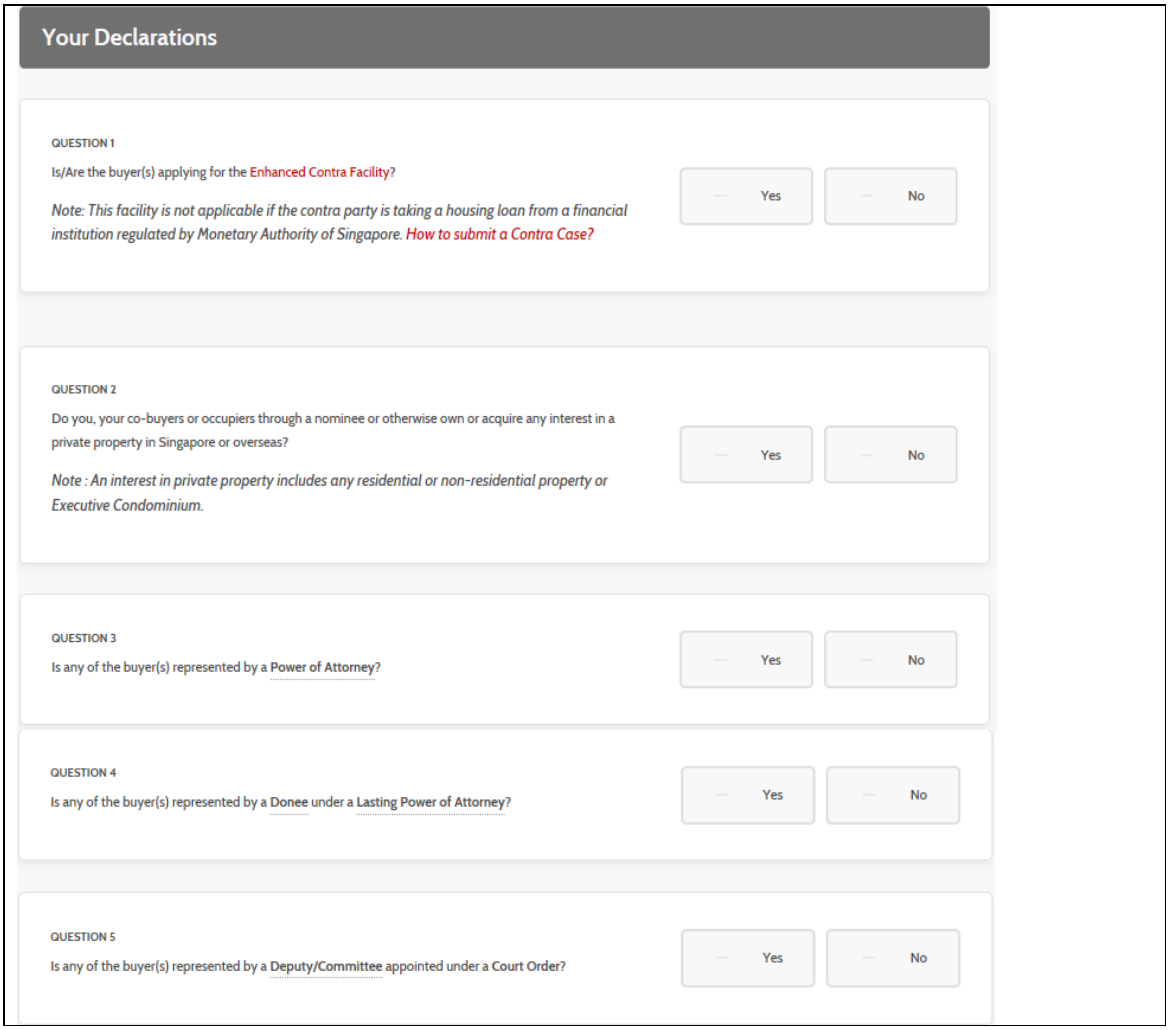


(m) Mixed-race couples or individuals with mixed parentage can be classified under a different ethnic category. Under this section, please indicate the preferred ethnic group for the purpose of the Ethnic Integration Policy (EIP).

The drop-down menu will only show the ethnic group of the buyer(s) and occupier(s).



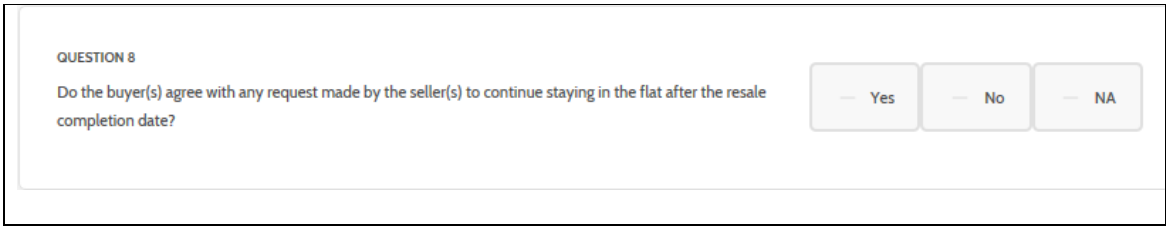
(n) Under this section, provide the necessary information relating to the purchase transaction.





(o) For this question, please indicate whether the buyer(s) are agreeable to the seller(s) request for temporary extension of stay. If this question is not applicable, please indicate **NA**. You may click Save as Draft to save the information that you have entered.

Click **Next** and the Data Review page will be displayed.





<u>System Check: Temporary Extension of Stay after completion</u>

Input of "No" or "NA" has the same connotation for system matching.

The system will match the input on 'Temporary Extension of Stay' provided by the buyer and seller in their separate applications.

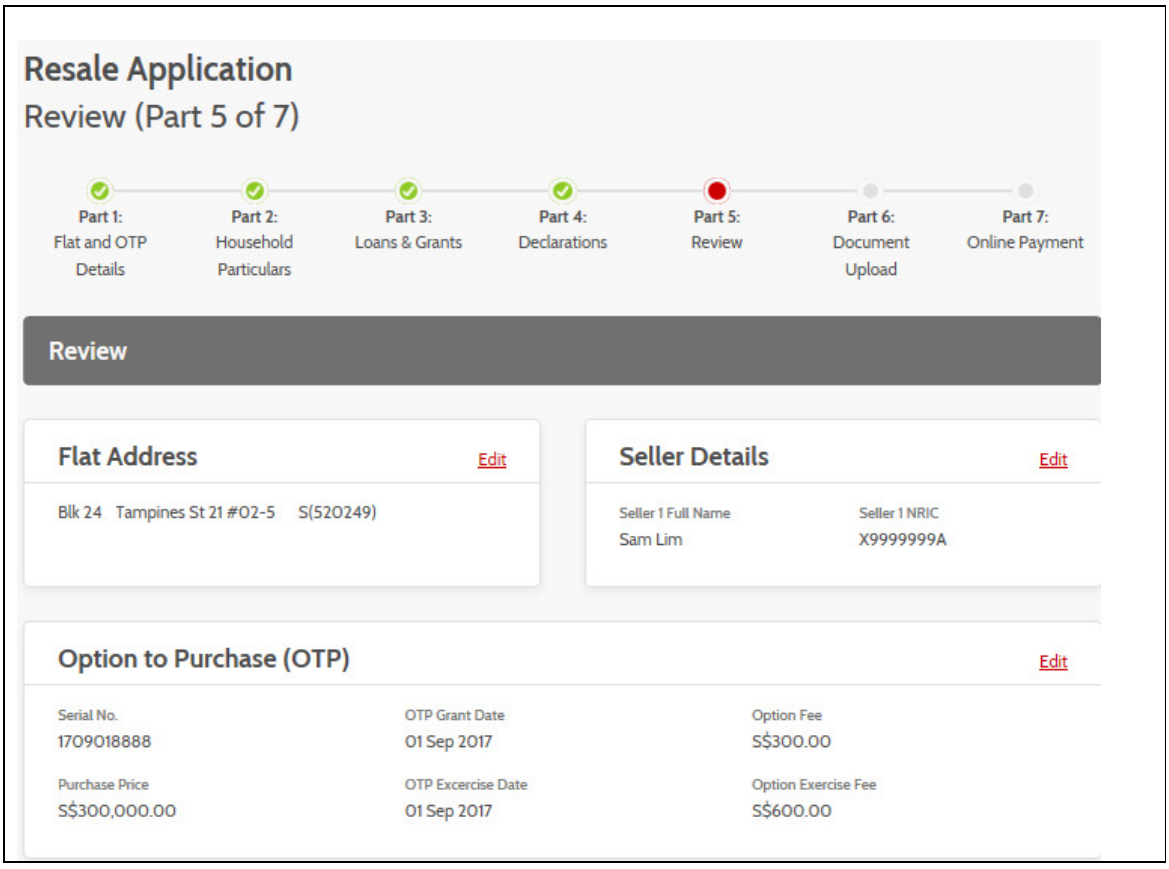
Both buyers and sellers have to provide consistent information relating to this field. If the second party receives the error message **"The information provided by buyers and sellers regarding temporary extension of stay after resale completion is different"**, it means that the information provided by the second party does not tally with that provided by the first party.

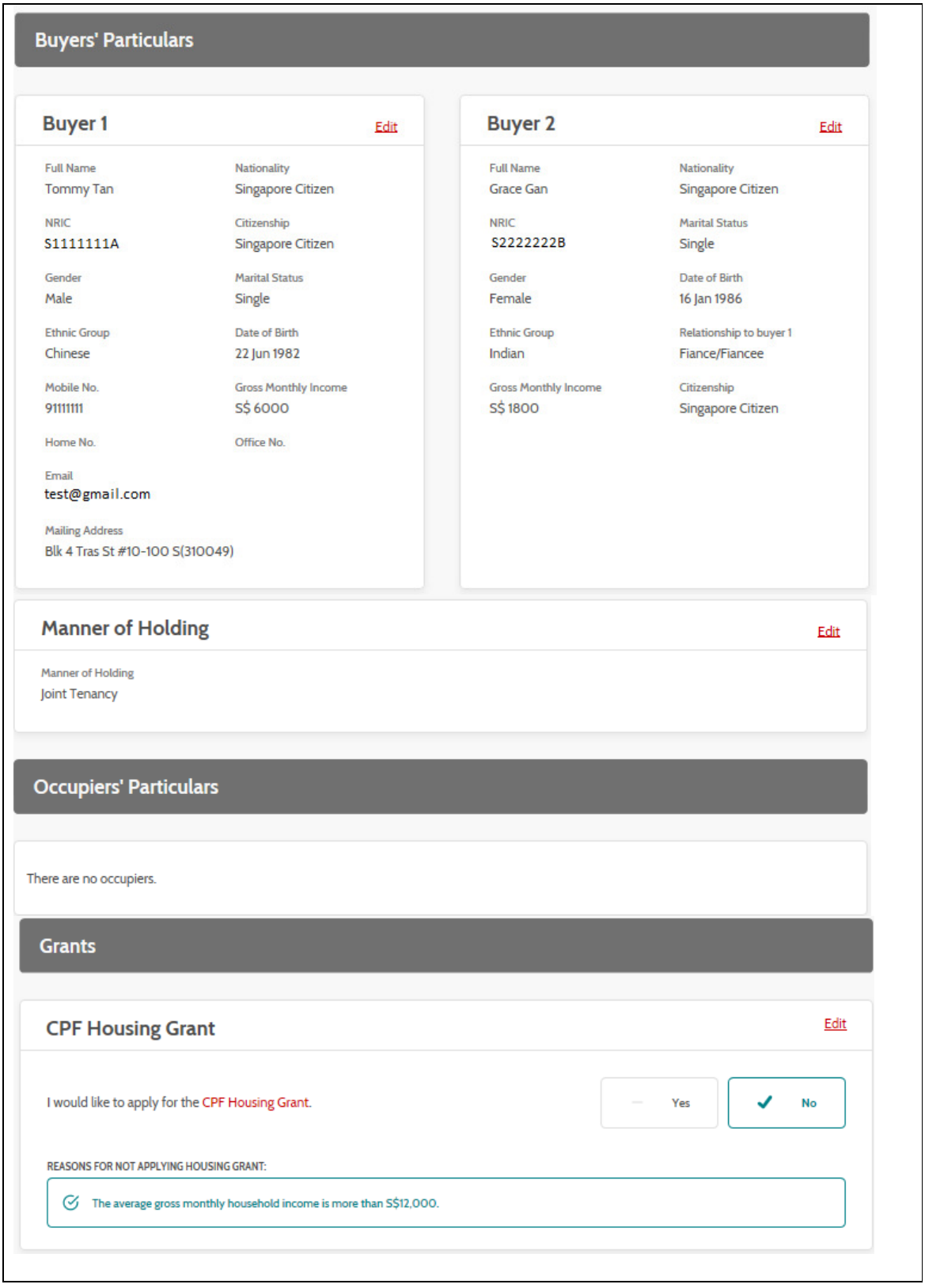
In the situation where the error is caused by the first party, you will have to inform HDB. You may contact our Customer Service Officer 6490 3626 (Mon – Fri from 8.30am to 5.30pm) to seek assistance for your submission of the resale application.

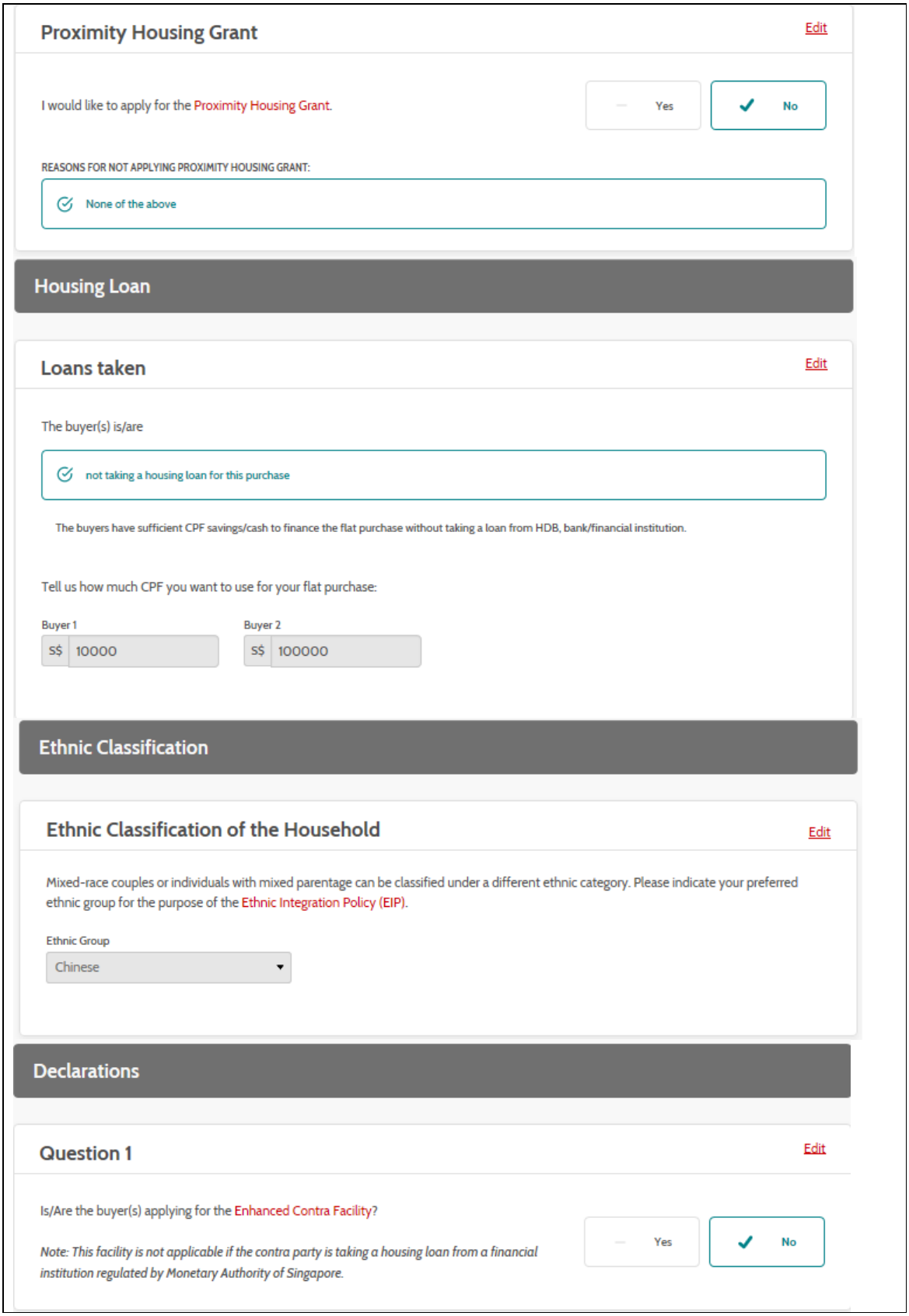
The following scenarios **cannot** request for temporary extension of stay after resale completion:

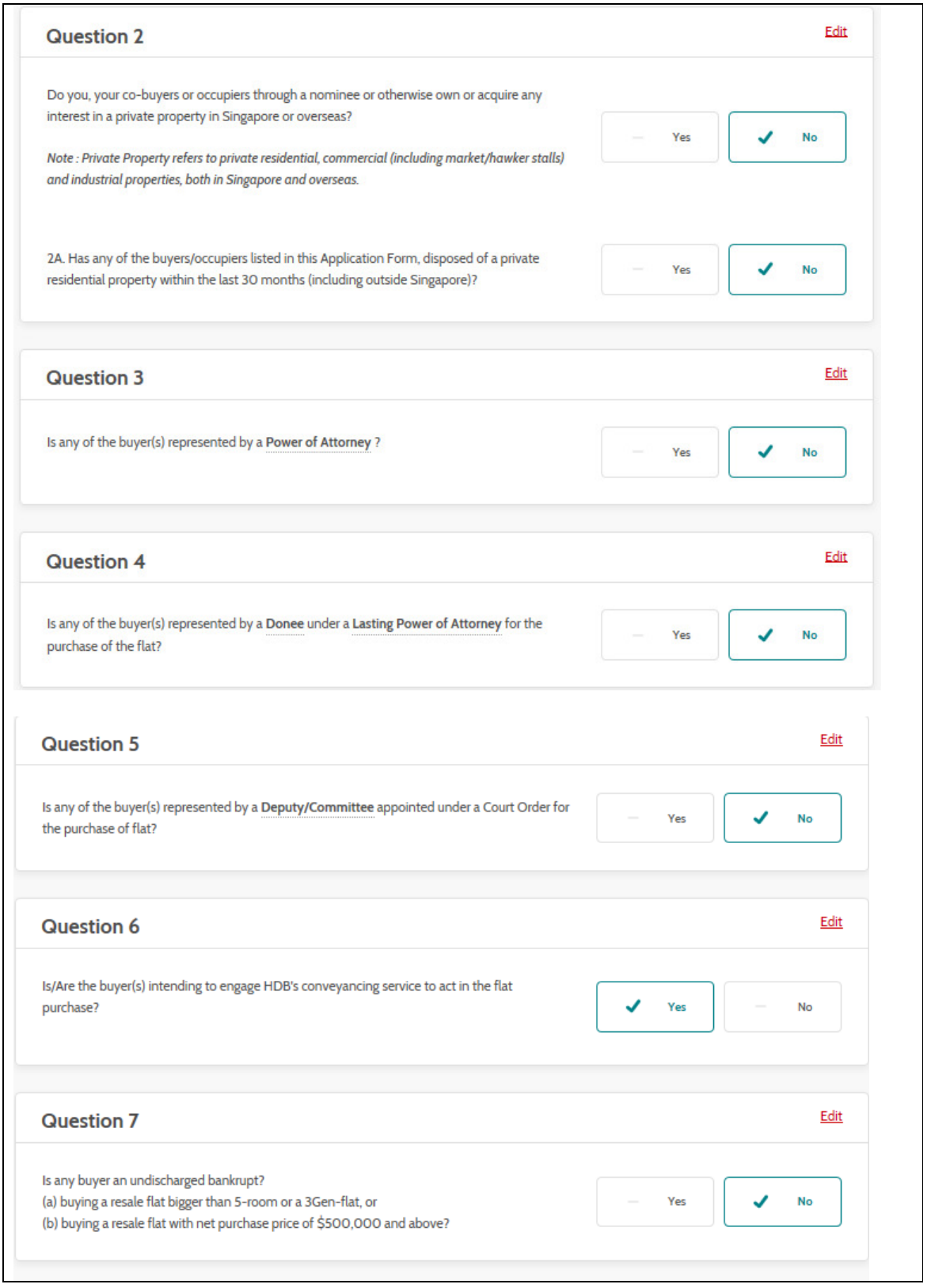
- Transactions involving Corporate Seller
- Transactions involving Mortgagee Sale
- Transactions involving Foreign Administrator/ Foreign Executor/ Public Trustee
- Resale flats with existing sublet arrangement
- Contra Flat B transactions (contra party and the seller of his flat)

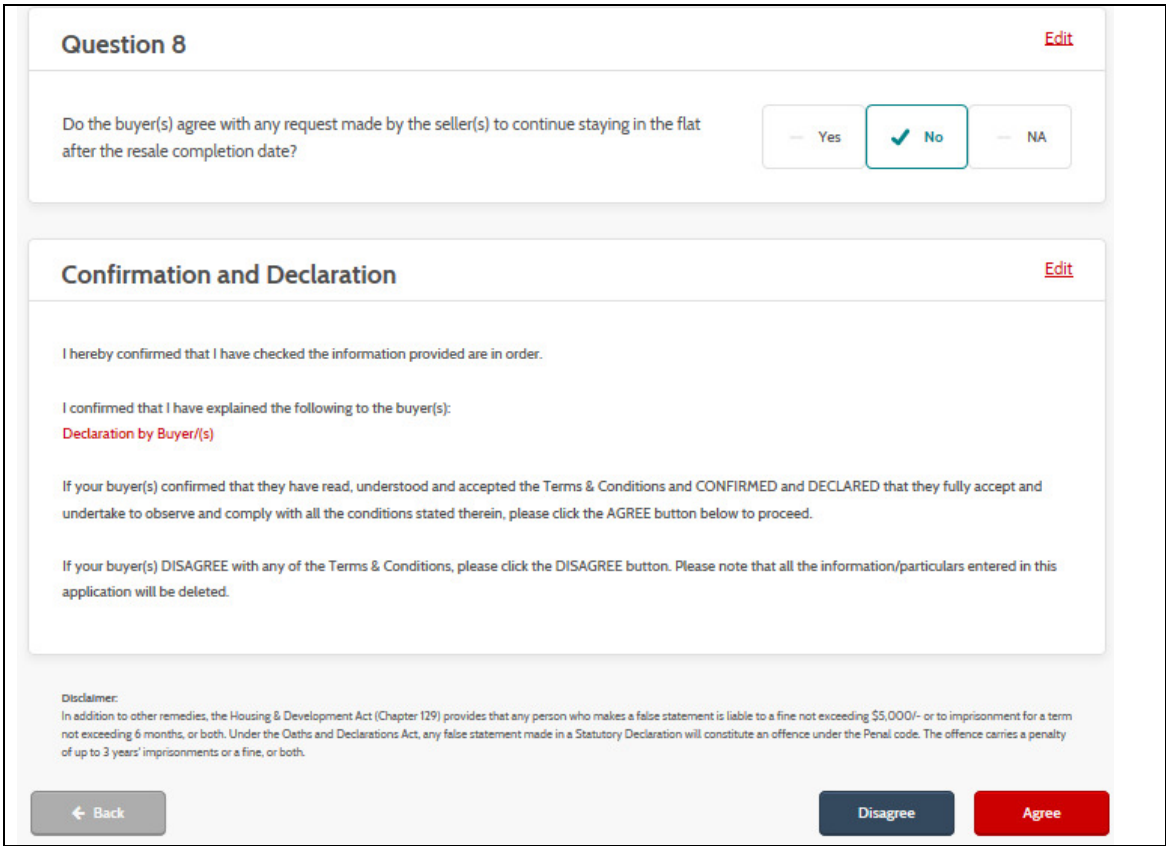
(p) Verify all the information in the Review page. Click **Back or Edit** if you need to make any amendments. If you have checked and confirmed that all the information is correct, please click **Agree**.




Buyers' Particulars
Buyer 1
Edit
Full Name
Tommy Tan
Nationality
Singapore Citizen
NRIC
S1111111A
Citizenship
Singapore Citizen
Gender
Male
Marital Status
Single
Ethnic Group
Chinese
Date of Birth
22 Jun 1982
Mobile No.
91111111
Gross Monthly Income
S$ 6000
Home No.
Office No.
Email
test@gmail.com
Mailing Address
Blk 4 Tras St #10-100 S(310049)
Buyer 2
Edit
Full Name
Grace Gan
Nationality
Singapore Citizen
NRIC
S2222222B
Marital Status
Single
Gender
Female
Date of Birth
16 Jan 1986
Ethnic Group
Indian
Relationship to buyer 1
Fiance/Fiancee
Gross Monthly Income
S$ 1800
Citizenship
Singapore Citizen
Manner of Holding
Edit
Manner of Holding
Joint Tenancy
Occupiers' Particulars
There are no occupiers.
Grants
CPF Housing Grant
Edit
I would like to apply for the CPF Housing Grant.
Yes
No
REASONS FOR NOT APPLYING HOUSING GRANT:
The average gross monthly household income is more than S$12,000.


Proximity Housing Grant
Edit
I would like to apply for the Proximity Housing Grant.
Yes
No
REASONS FOR NOT APPLYING PROXIMITY HOUSING GRANT:
None of the above
Housing Loan
Loans taken
Edit
The buyer(s) is/are
not taking a housing loan for this purchase
The buyers have sufficient CPF savings/cash to finance the flat purchase without taking a loan from HDB, bank/financial institution.
Tell us how much CPF you want to use for your flat purchase:
Buyer 1
S$ 10000
Buyer 2
S$ 100000
Ethnic Classification
Ethnic Classification of the Household
Edit
Mixed-race couples or individuals with mixed parentage can be classified under a different ethnic category. Please indicate your preferred ethnic group for the purpose of the Ethnic Integration Policy (EIP).
Ethnic Group
Chinese
Declarations
Question 1
Edit
Is/Are the buyer(s) applying for the Enhanced Contra Facility?
Note: This facility is not applicable if the contra party is taking a housing loan from a financial institution regulated by Monetary Authority of Singapore.
Yes
No


Question 2
Edit
Do you, your co-buyers or occupiers through a nominee or otherwise own or acquire any interest in a private property in Singapore or overseas?
Note : Private Property refers to private residential, commercial (including market/hawker stalls) and industrial properties, both in Singapore and overseas.
Yes
No
2A. Has any of the buyers/occupiers listed in this Application Form, disposed of a private residential property within the last 30 months (including outside Singapore)?
Yes
No
Question 3
Edit
Is any of the buyer(s) represented by a Power of Attorney ?
Yes
No
Question 4
Edit
Is any of the buyer(s) represented by a Donee under a Lasting Power of Attorney for the purchase of the flat?
Yes
No
Question 5
Edit
Is any of the buyer(s) represented by a Deputy/Committee appointed under a Court Order for the purchase of flat?
Yes
No
Question 6
Edit
Is/Are the buyer(s) intending to engage HDB's conveyancing service to act in the flat purchase?
Yes
No
Question 7
Edit
Is any buyer an undischarged bankrupt?
(a) buying a resale flat bigger than 5-room or a 3Gen-flat, or
(b) buying a resale flat with net purchase price of $500,000 and above?
Yes
No



(q) Based on buyers' circumstances, personal document such as divorce certificate may need to be uploaded. If the buyers have indicated that they are applying for CPF Housing Grant, they are required to upload the relevant income documents. Part 6 of 7 provides a list of the document(s) that is required. <u>All documents must be uploaded</u> before proceeding further.



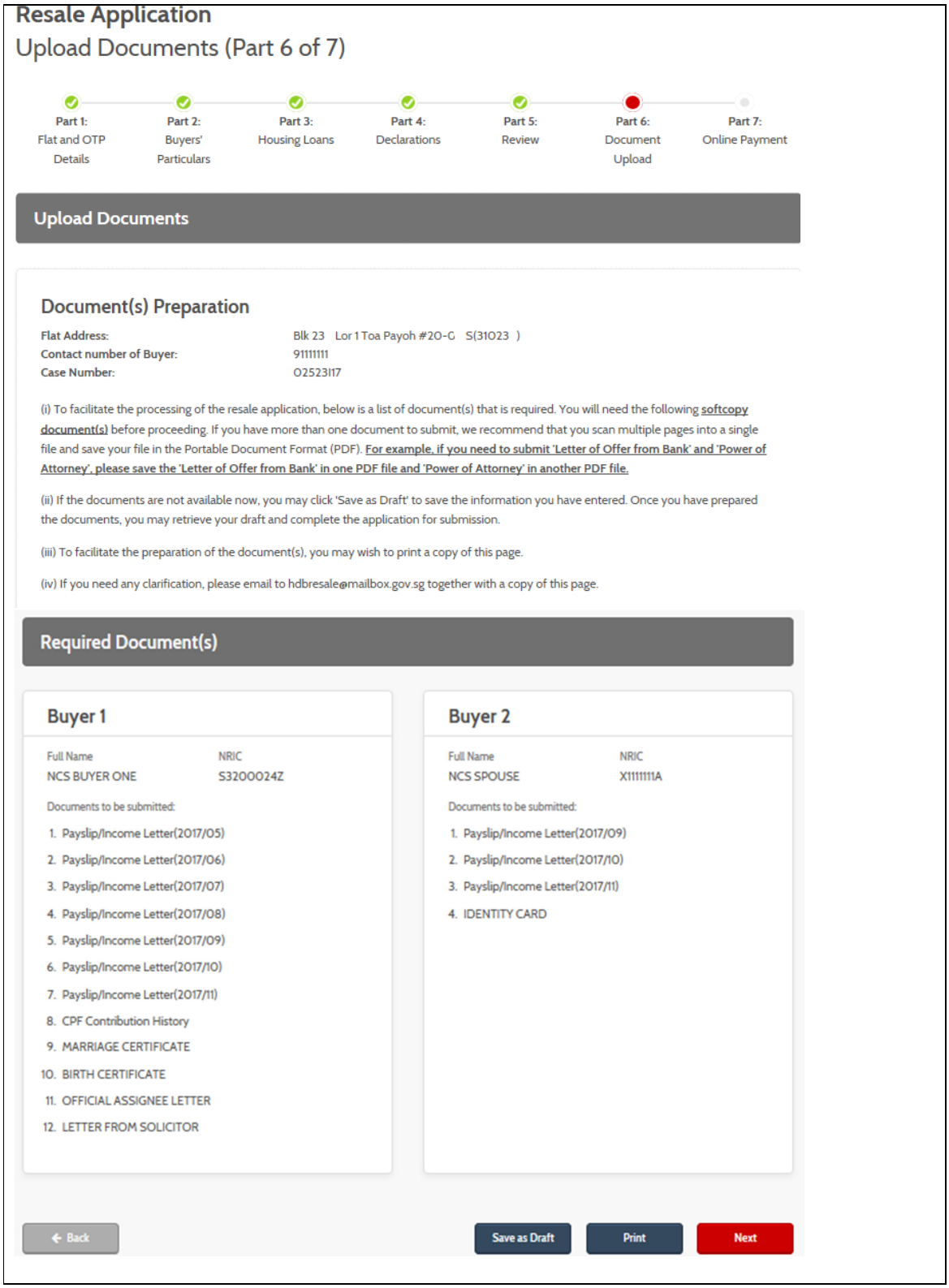
If you have more than one document to submit, we recommend that you scan multiple pages into a single file and save your file in the Portable Document Format (PDF). <u>For example, if you need to submit 'Payslip/Income letter' and 'CPF Contribution History' please save all your 'payslips/income letters' in one PDF file and 'CPF Contribution History' in another PDF file</u>.

If the documents are not available now, you may click **Save as Draft** to save the information that you have entered.

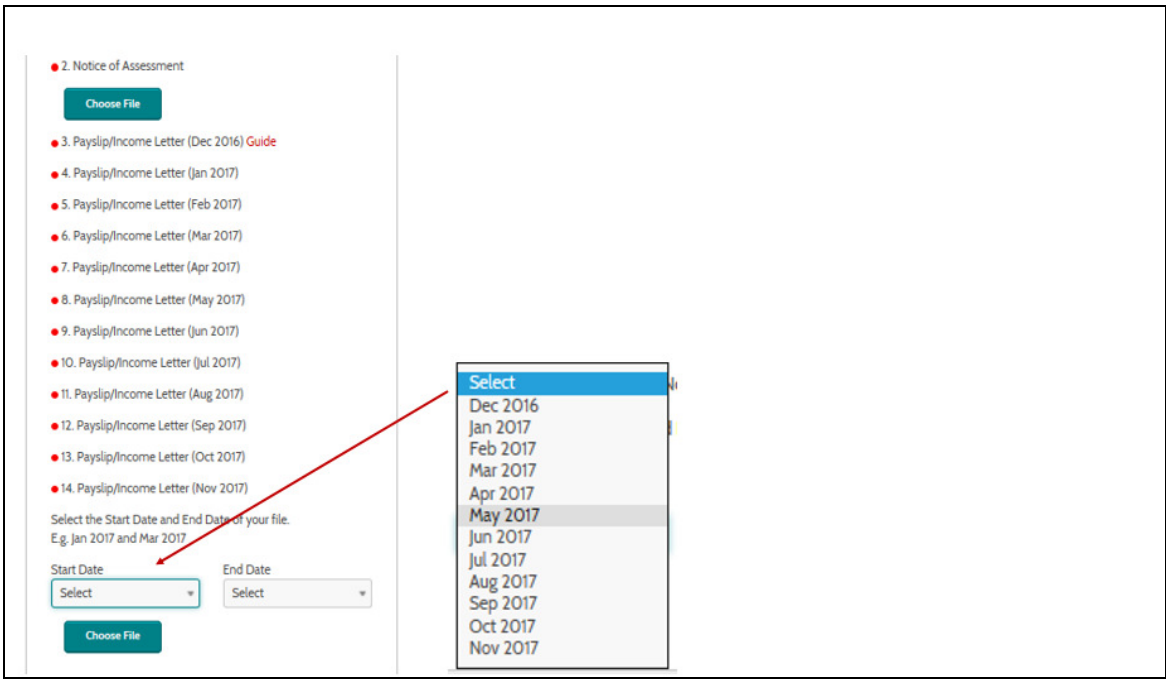
To facilitate the preparation of the document(s), you may wish to **print** a copy of this page.

If you need any clarification, please email to hdbresale@mailbox.hdb.gov.sg together with a copy of this page.

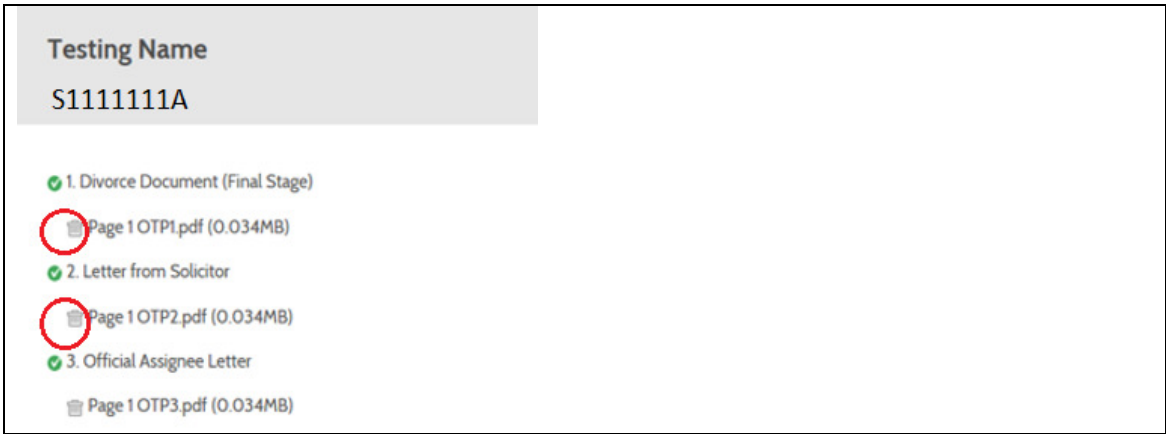
Click **Next** to proceed if the softcopy income documents are available.



The income document can be uploaded ‘month by month’ or via ‘a range of months’.



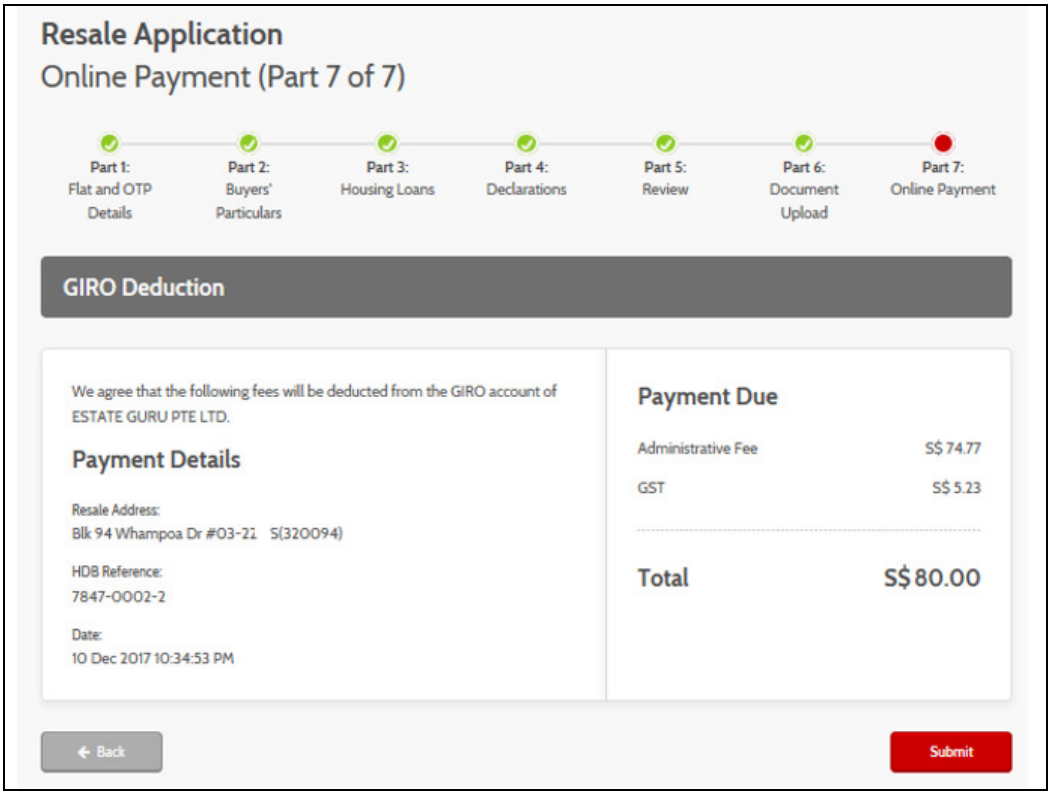
If a wrong income document is uploaded, you can click the **dustbin icon** on the left.





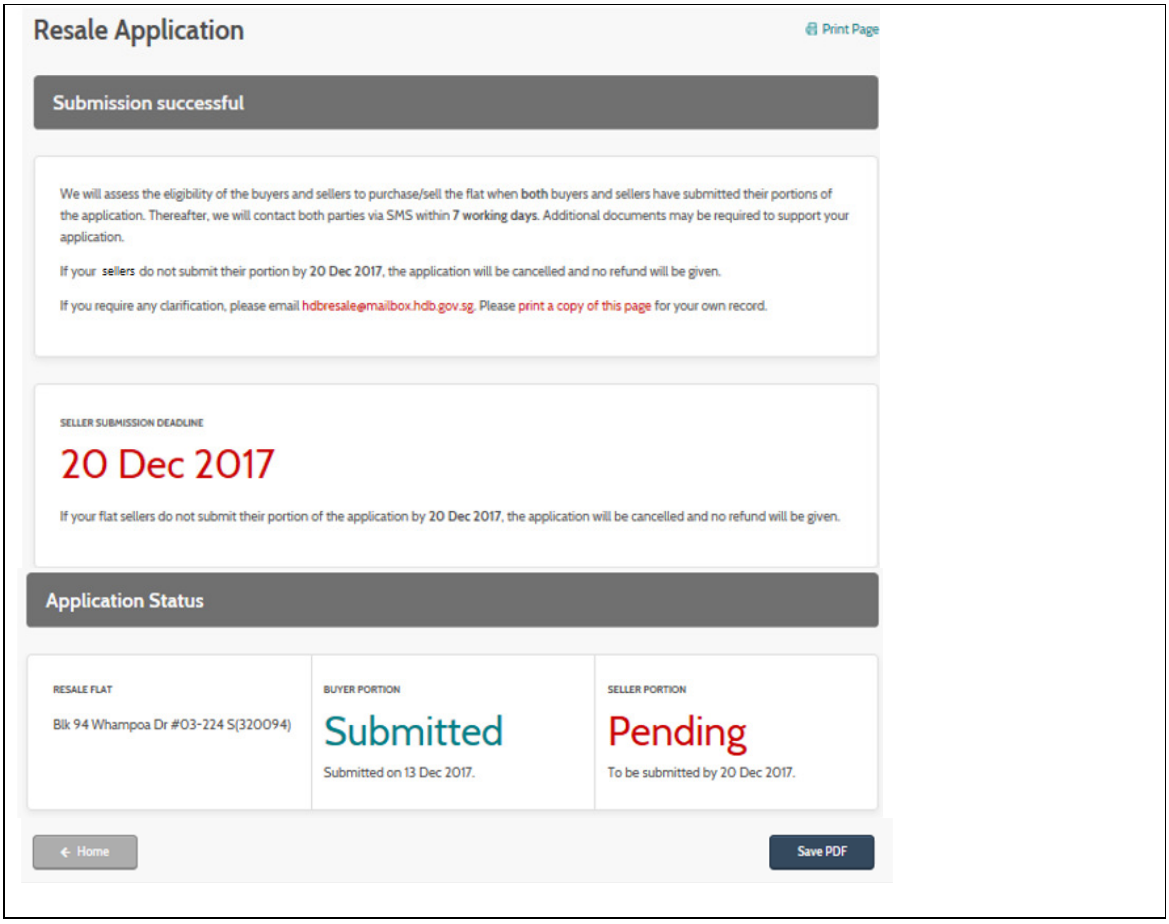
- There will be a green tick when the document is uploaded.
- PDF file with the same filename cannot be used.

(r) The payment page will be displayed. Click **Submit** to proceed with the submission of application.

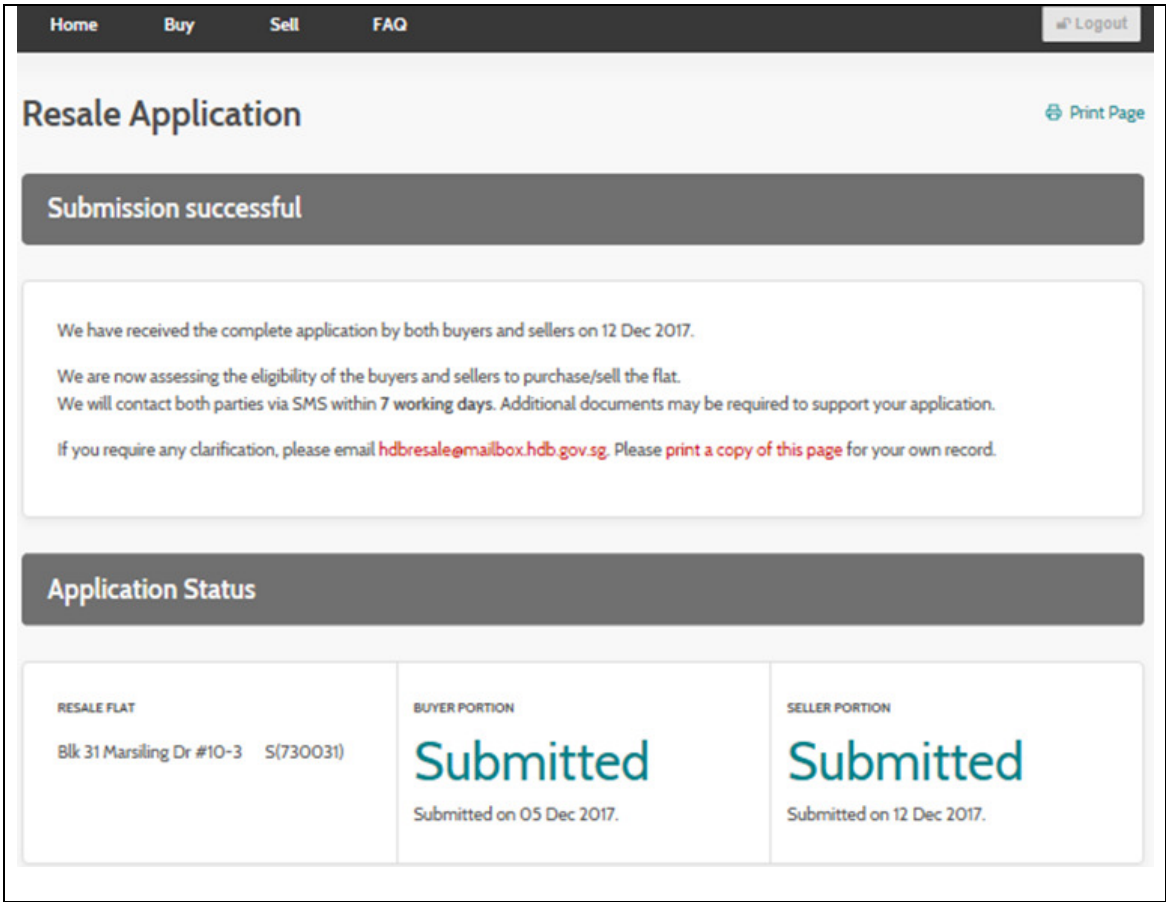


(s) Acknowledgement page

(i) This acknowledgement page will be displayed to the first party who has submitted the resale application.



(ii) This acknowledgement page will be displayed to the last party who has submitted the resale application.



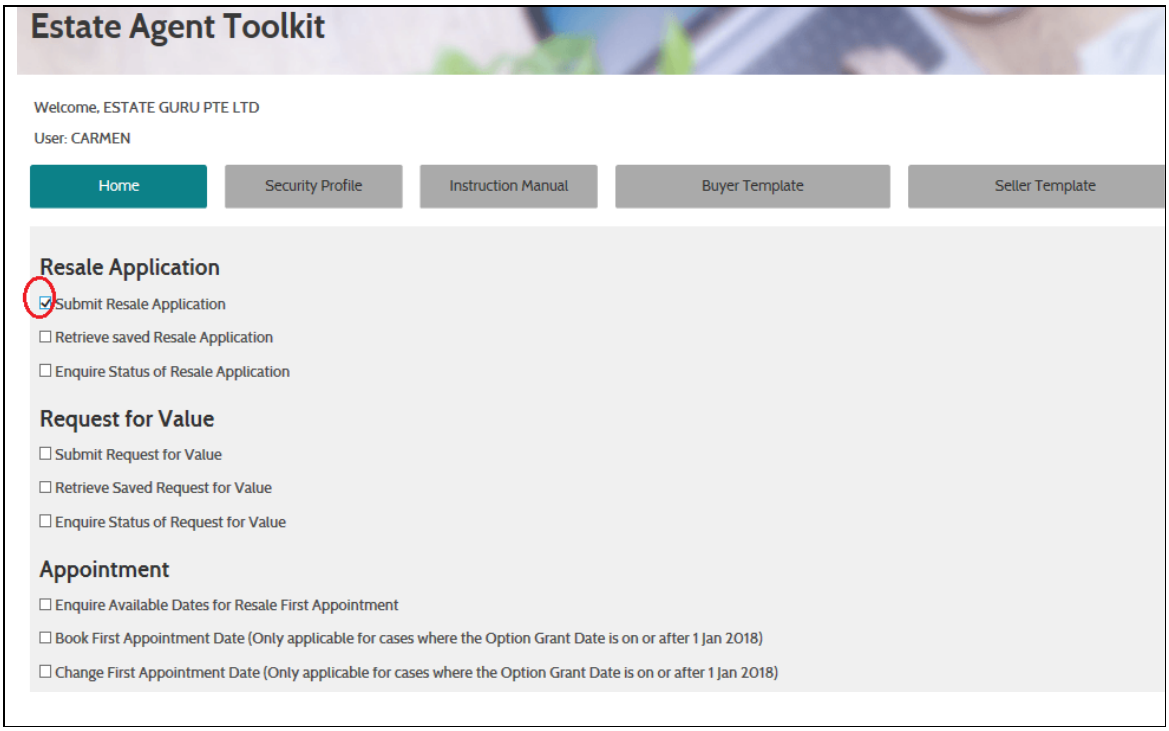
In scenario where the Option Grant Date is before 1 Jan 2018, the last party who submits the resale application may book the First Appointment date. You may refer to Chapter 5 for the steps relating to the booking of First Appointment.

3.2 Submitting an application for Sellers

To submit the resale application for seller, you will need the following information:

- Resale Flat Address
- Option to Purchase (OTP) details (please refer to the OTP that the buyers and sellers have executed)
- Personal Particulars of all sellers
- Softcopy personal documents of sellers (e.g. divorce certificate)

(a) Select the checkbox “Submit Resale Application” and click **Next**.



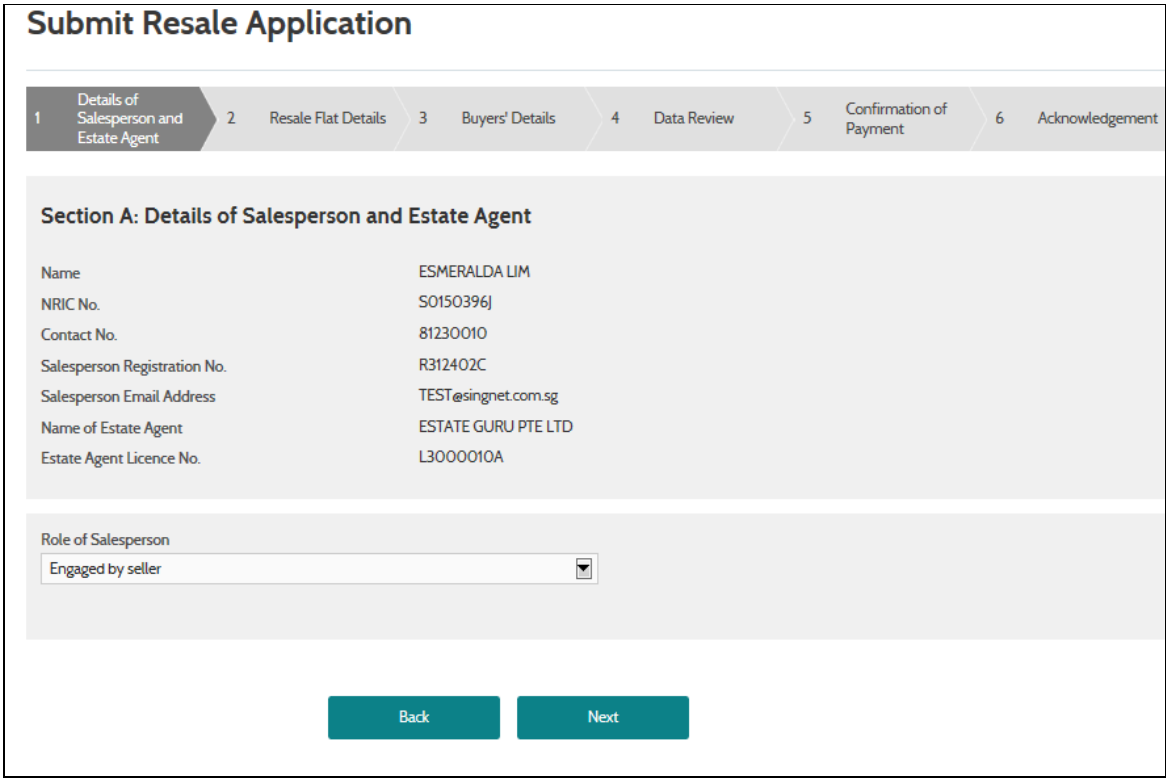
(b) Key in the NRIC of the salesperson handling the sale transaction and click **Next**.



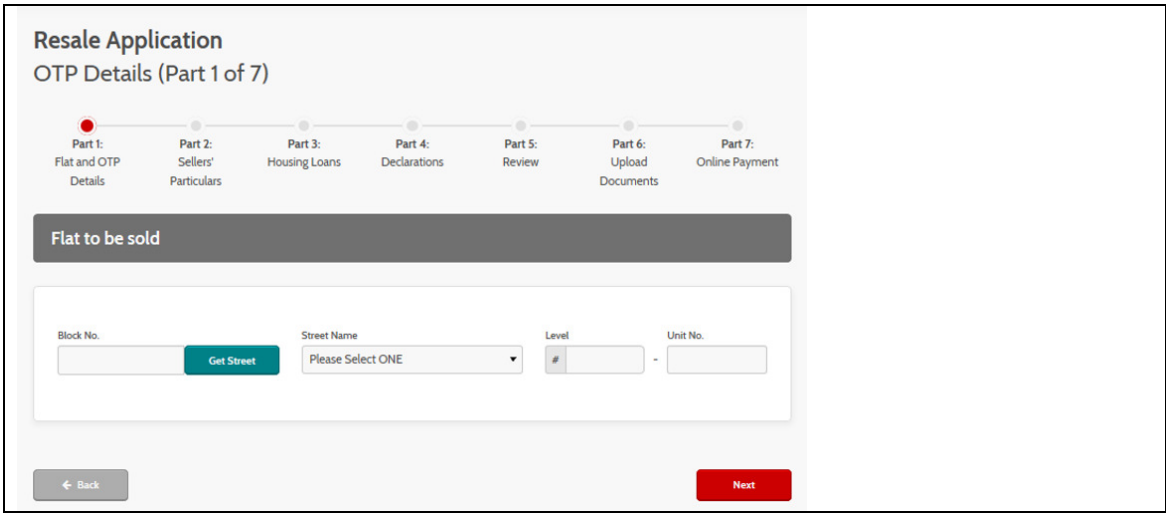
(c) The particulars of the salesperson will be will be retrieved from CEA and displayed accordingly.

(d) Select the role of the salesperson.

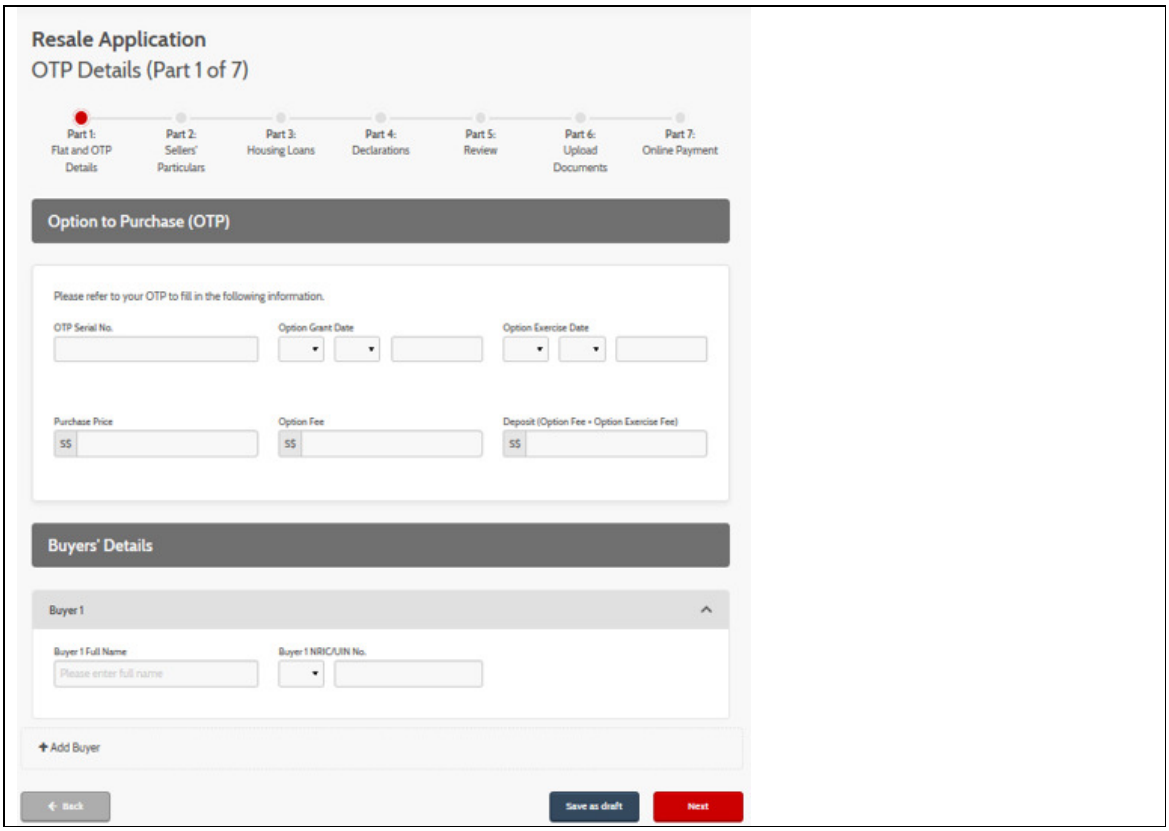
(e) Verify all the information and click **Next**.



(f) Under Part 1 of 7, key in block number and click **Get Street**. Select the correct street name from the drop-down list. Click **Next** once the complete resale flat address has been keyed in.



(g) Under this section, key in the Option to Purchase (OTP) details.





The system will match the following information provided by the buyer and seller in their separate applications:

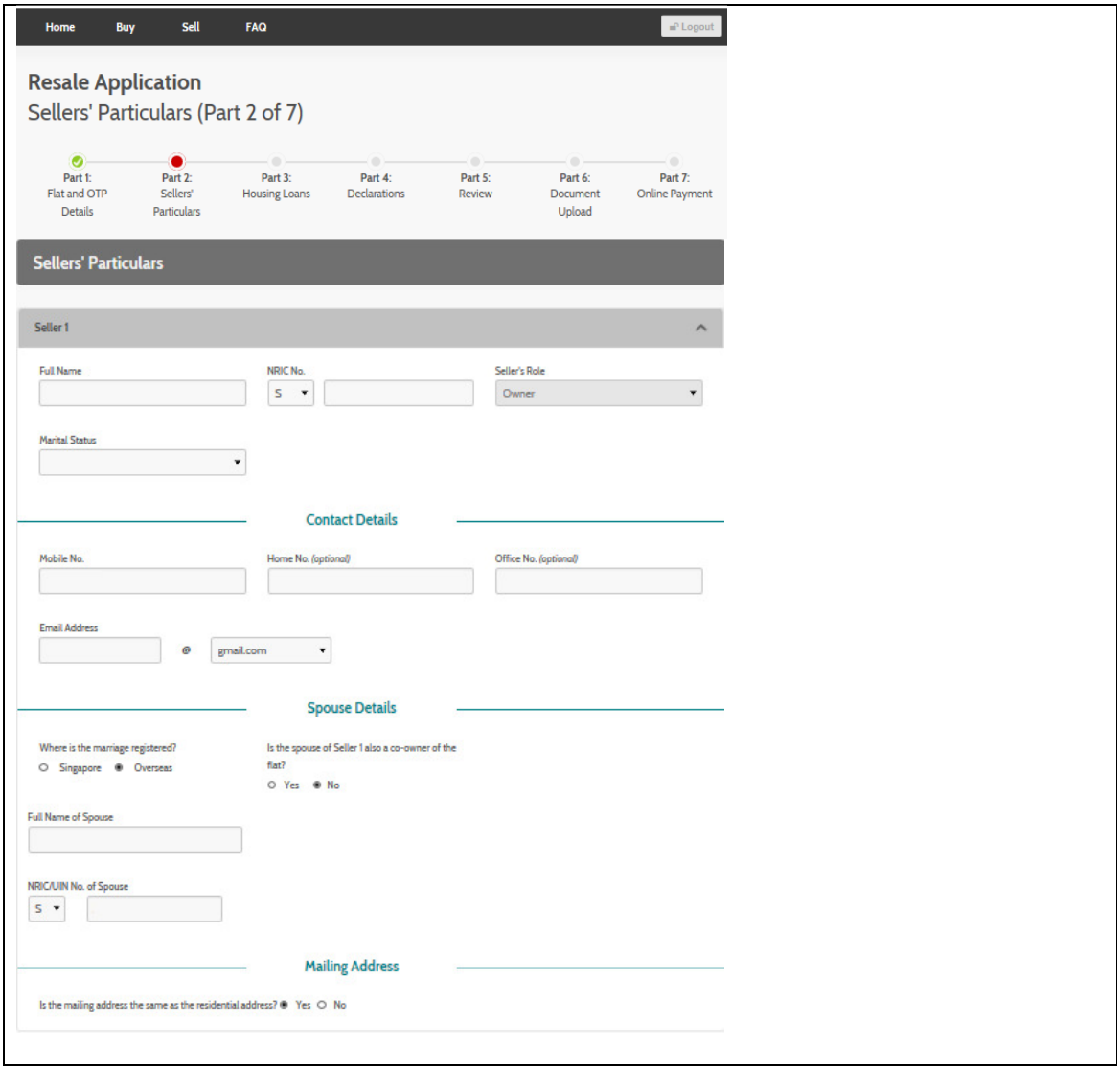
(i) Resale Flat Address

(ii) Option to Purchase Details (Resale Price, Option Fee, Deposit, Option Grant Date, Option Exercise Date, OTP Serial No.)

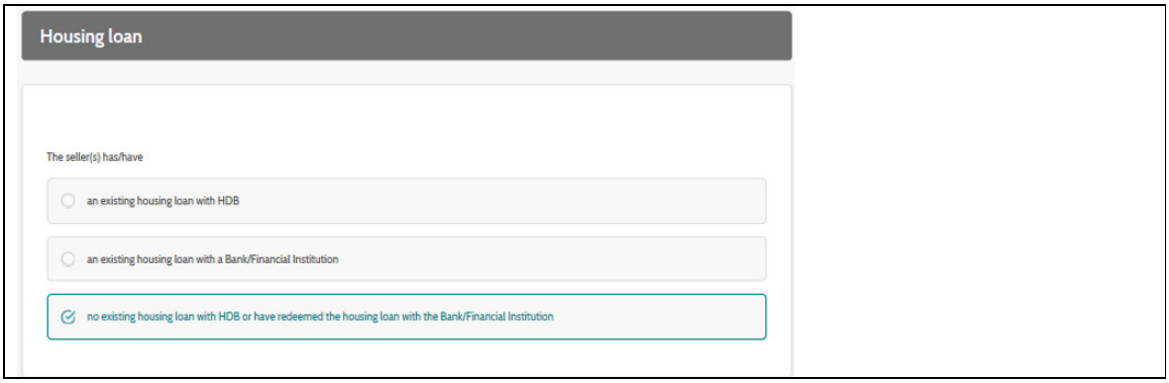
Both buyers and sellers have to provide consistent information relating to the resale transaction. If the second party receives the error message **"The information provided by buyers and sellers are different"**, it means that the information provided by the second party does not tally with that provided by the first party. You have to recheck the OTP information you have provided. When filling up this portion, please refer to the Option To Purchase that both buyers and sellers have executed.

In the situation where the error is caused by the first party, you will have to inform HDB. You may contact our Customer Service Officer 6490 3626 (Mon – Fri from 8.30am to 5.30pm) to seek assistance for your submission of the resale application.

(h) Under Part 2 of 7, key in the particulars of all sellers.

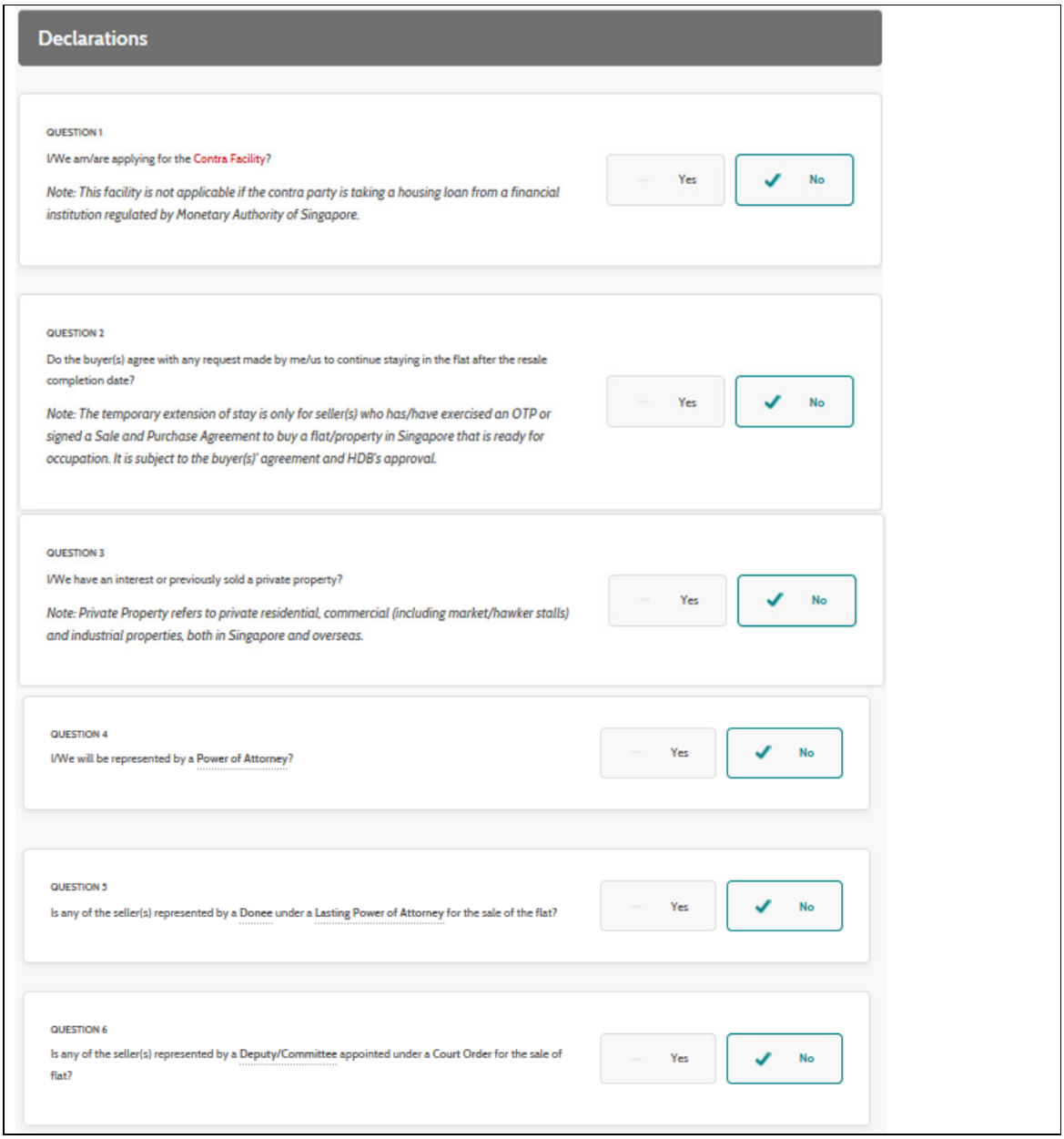


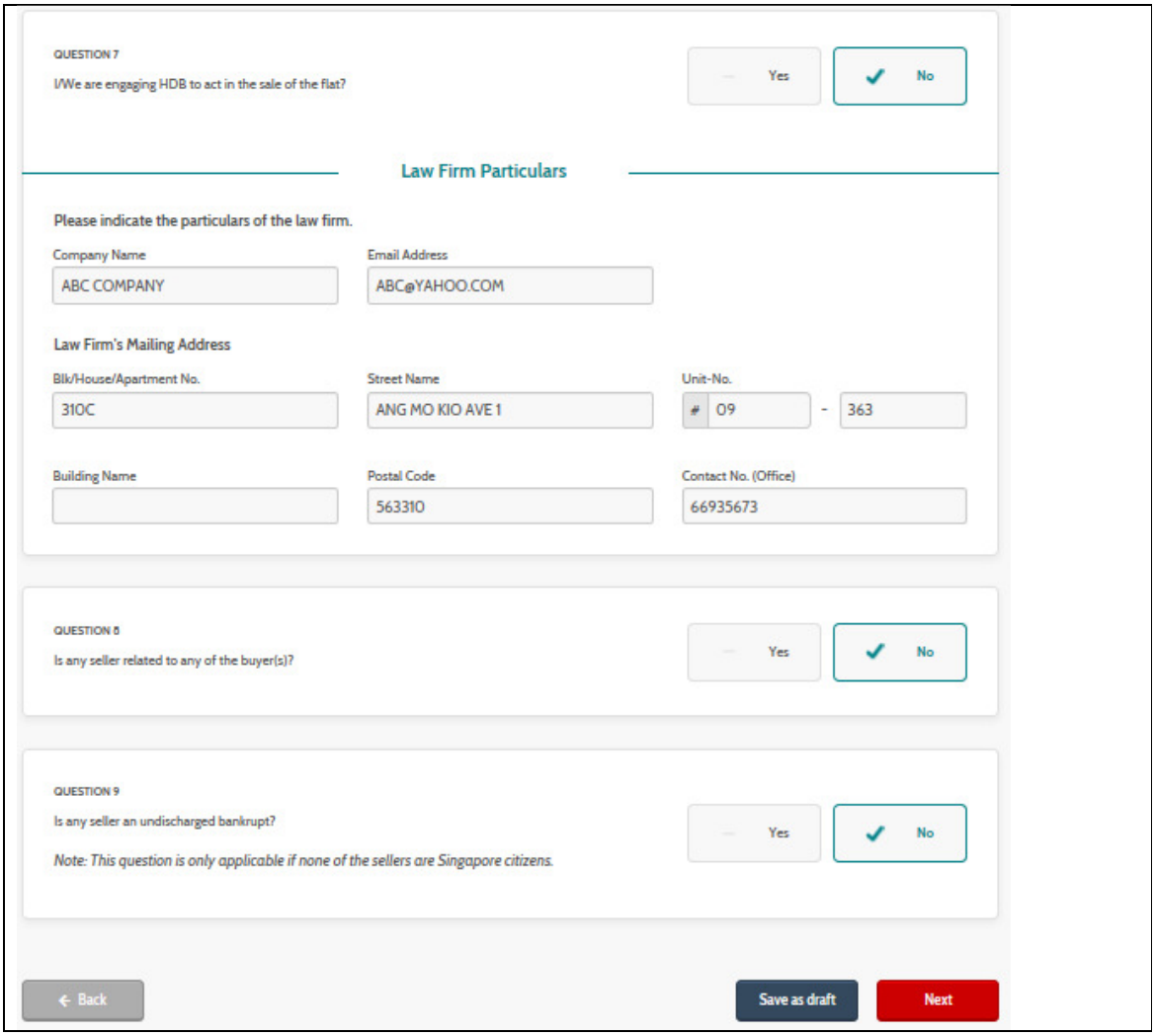
(i) Under Section E, please indicate whether the owner(s) has/ have an existing housing loan from HDB or Bank/ Financial Institution.



(j) Under Part 4 of 7, please provide the necessary information relating to the sale transaction.

You may click **Save as Draft** to save the information that you have entered. Click **Next** and the Review page will be displayed.







<u>System Check at Q2: Temporary Extension of Stay after completion</u>

The system will match the input on 'Temporary Extension of Stay' provided by the buyer and seller in their separate applications.

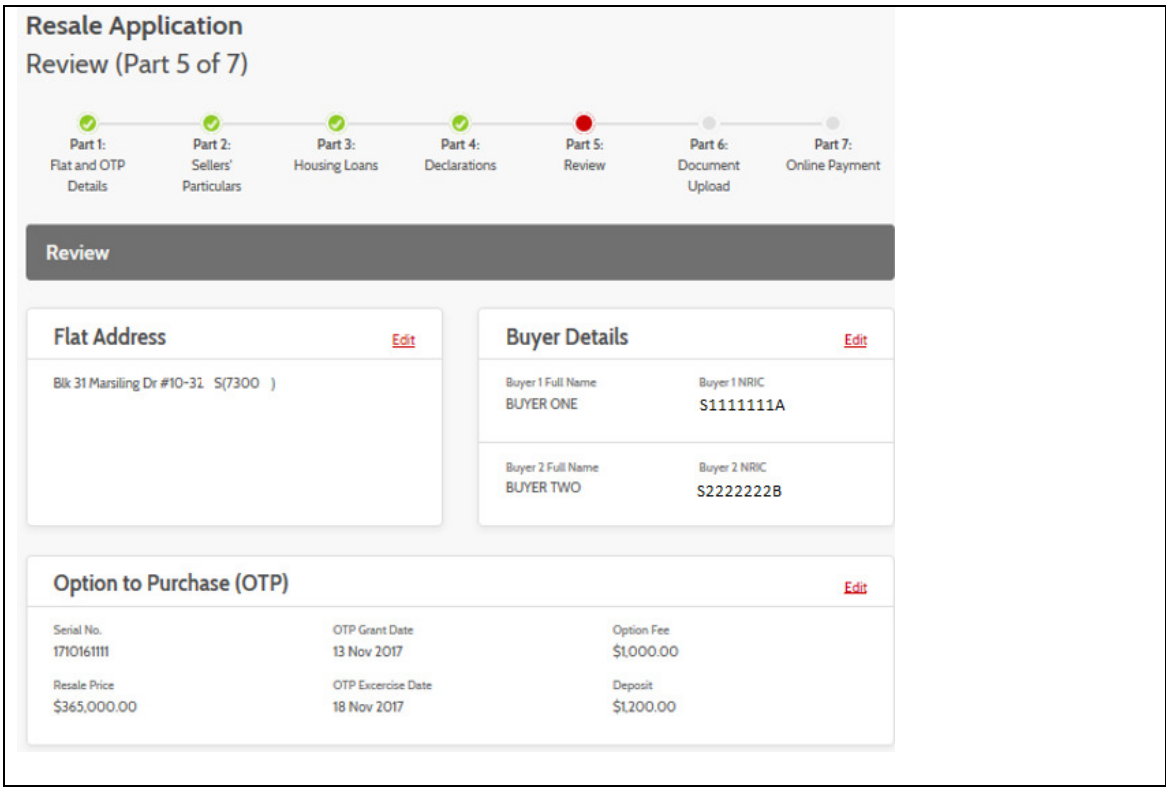
Both buyers and sellers have to provide consistent information relating to this field. If the second party receives the error message **"The information provided by buyers and sellers regarding temporary extension of stay after resale completion is different"**, it means that the information provided by the second party does not tally with that provided by the first party.

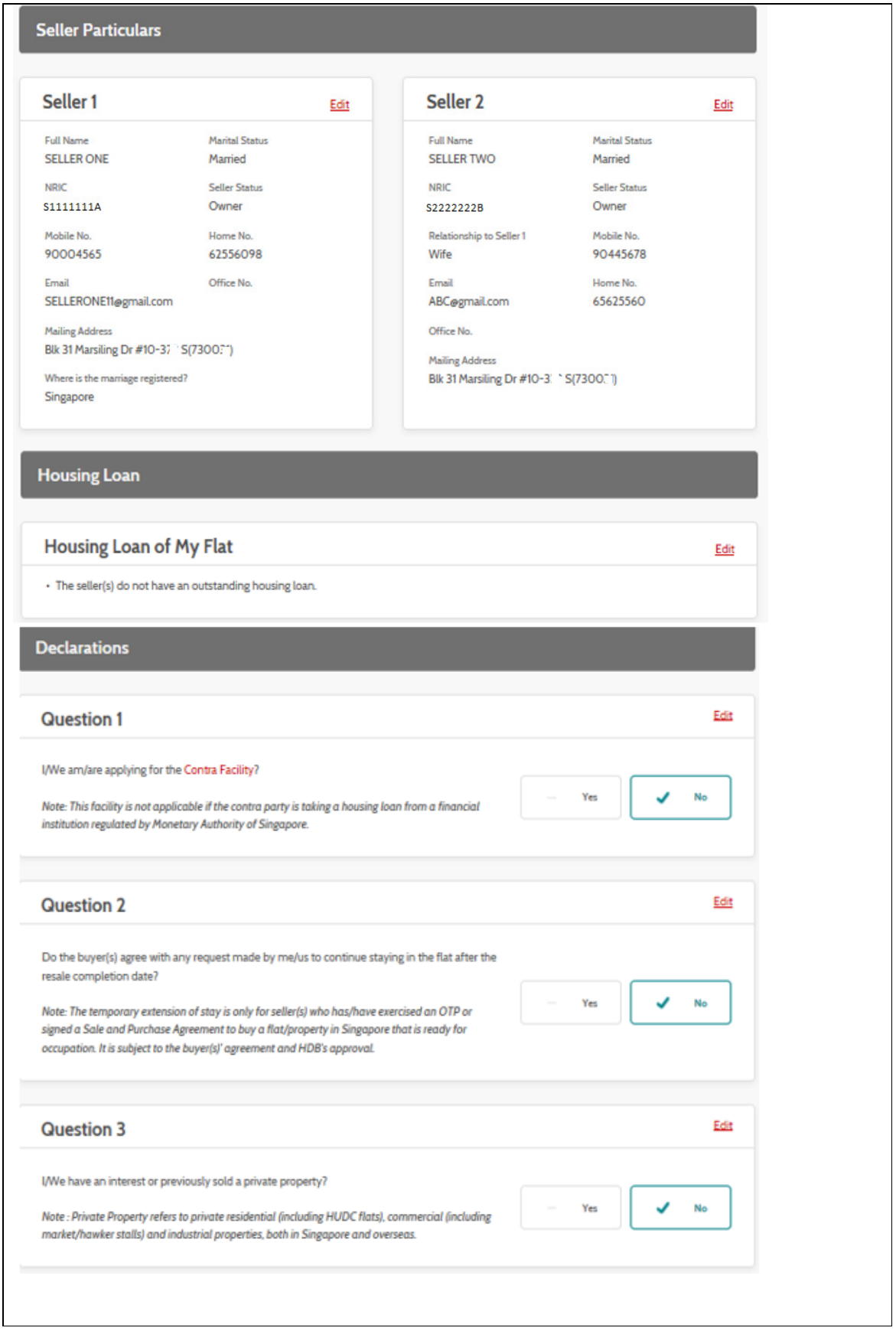
In the situation where the error is caused by the first party, you will have to inform HDB. You may contact our Customer Service Officer 6490 3626 (Mon – Fri from 8.30am to 5.30pm) to seek assistance for your submission of the resale application.

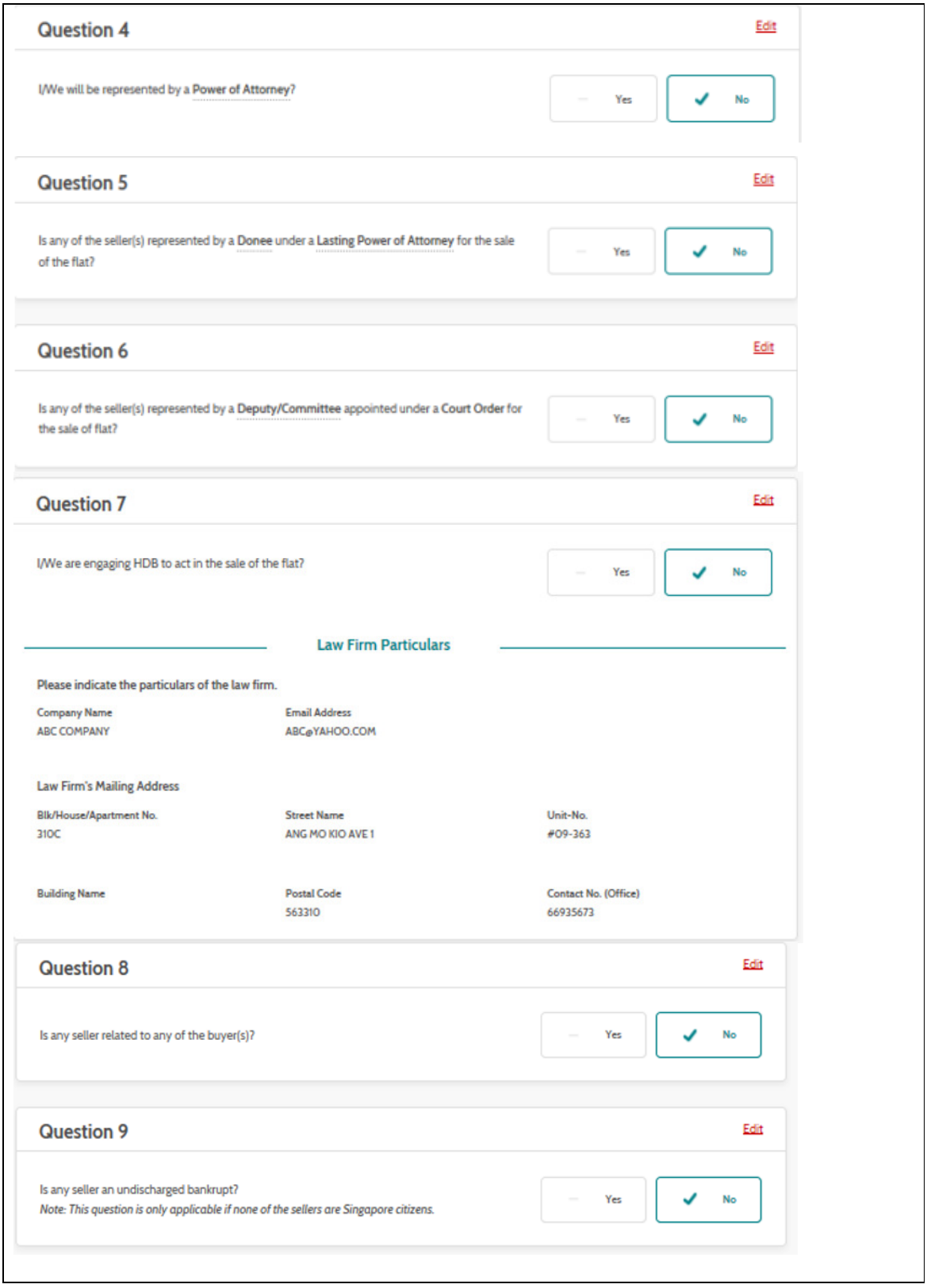
The following scenarios **cannot** request for temporary extension of stay after resale completion:

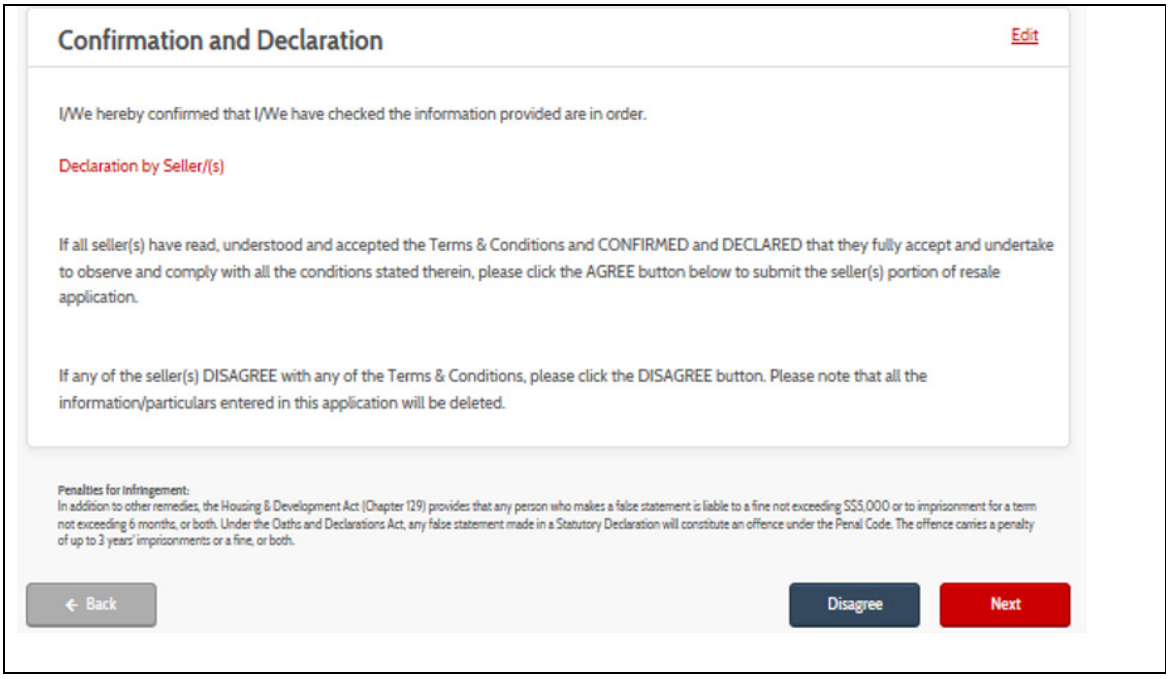
- Transactions involving Corporate Seller
- Transactions involving Mortgagee Sale
- Transactions involving Foreign Administrator/ Foreign Executor/ Public Trustee
- Resale flats with existing sublet arrangement
- Contra Flat B transactions (contra party and the seller of his flat)

(k) Verify all the information in the Review page. Click **Back or Edit** if you need to make any amendments. If you have checked and confirmed that all the information is correct, please click **Agree**.

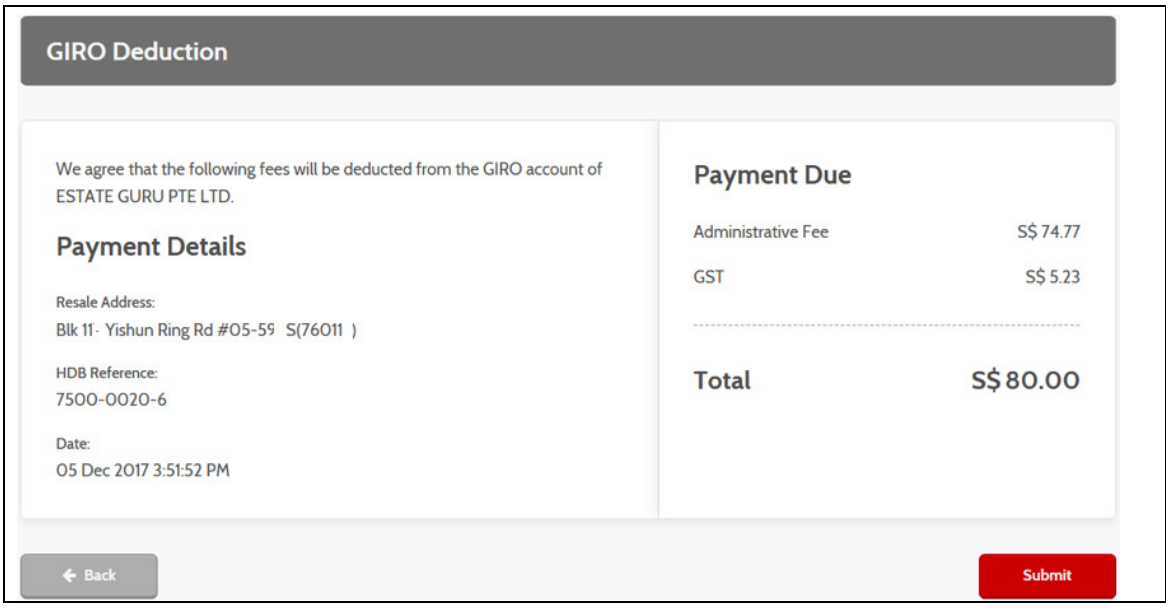



Seller Particulars
Seller 1
Edit
Full Name
SELLER ONE
Marital Status
Married
NRIC
S1111111A
Seller Status
Owner
Mobile No.
90004565
Home No.
62556098
Email
SELLERONE11@gmail.com
Office No.
Mailing Address
Blk 31 Marsiling Dr #10-37 S(730037)
Where is the marriage registered?
Singapore
Seller 2
Edit
Full Name
SELLER TWO
Marital Status
Married
NRIC
S2222222B
Seller Status
Owner
Relationship to Seller 1
Wife
Mobile No.
90445678
Email
ABC@gmail.com
Home No.
65625560
Office No.
Mailing Address
Blk 31 Marsiling Dr #10-37 S(730037)
Housing Loan
Housing Loan of My Flat
Edit
• The seller(s) do not have an outstanding housing loan.
Declarations
Question 1
Edit
I/We am/are applying for the Contra Facility?
Note: This facility is not applicable if the contra party is taking a housing loan from a financial institution regulated by Monetary Authority of Singapore.
Yes
No
Question 2
Edit
Do the buyer(s) agree with any request made by me/us to continue staying in the flat after the resale completion date?
Note: The temporary extension of stay is only for seller(s) who has/have exercised an OTP or signed a Sale and Purchase Agreement to buy a flat/property in Singapore that is ready for occupation. It is subject to the buyer(s)' agreement and HDB's approval.
Yes
No
Question 3
Edit
I/We have an interest or previously sold a private property?
Note : Private Property refers to private residential (including HUDC flats), commercial (including market/hawker stalls) and industrial properties, both in Singapore and overseas.
Yes
No


Question 4
Edit
I/We will be represented by a Power of Attorney?
Yes
No
Question 5
Edit
Is any of the seller(s) represented by a Donee under a Lasting Power of Attorney for the sale of the flat?
Yes
No
Question 6
Edit
Is any of the seller(s) represented by a Deputy/Committee appointed under a Court Order for the sale of flat?
Yes
No
Question 7
Edit
I/We are engaging HDB to act in the sale of the flat?
Yes
No
Law Firm Particulars
Please indicate the particulars of the law firm.
Company Name
ABC COMPANY
Email Address
ABC@YAHOO.COM
Law Firm's Mailing Address
Blk/House/Apartment No.
310C
Street Name
ANG MO KIO AVE 1
Unit-No.
#09-363
Building Name
Postal Code
563310
Contact No. (Office)
66935673
Question 8
Edit
Is any seller related to any of the buyer(s)?
Yes
No
Question 9
Edit
Is any seller an undischarged bankrupt?
Note: This question is only applicable if none of the sellers are Singapore citizens.
Yes
No

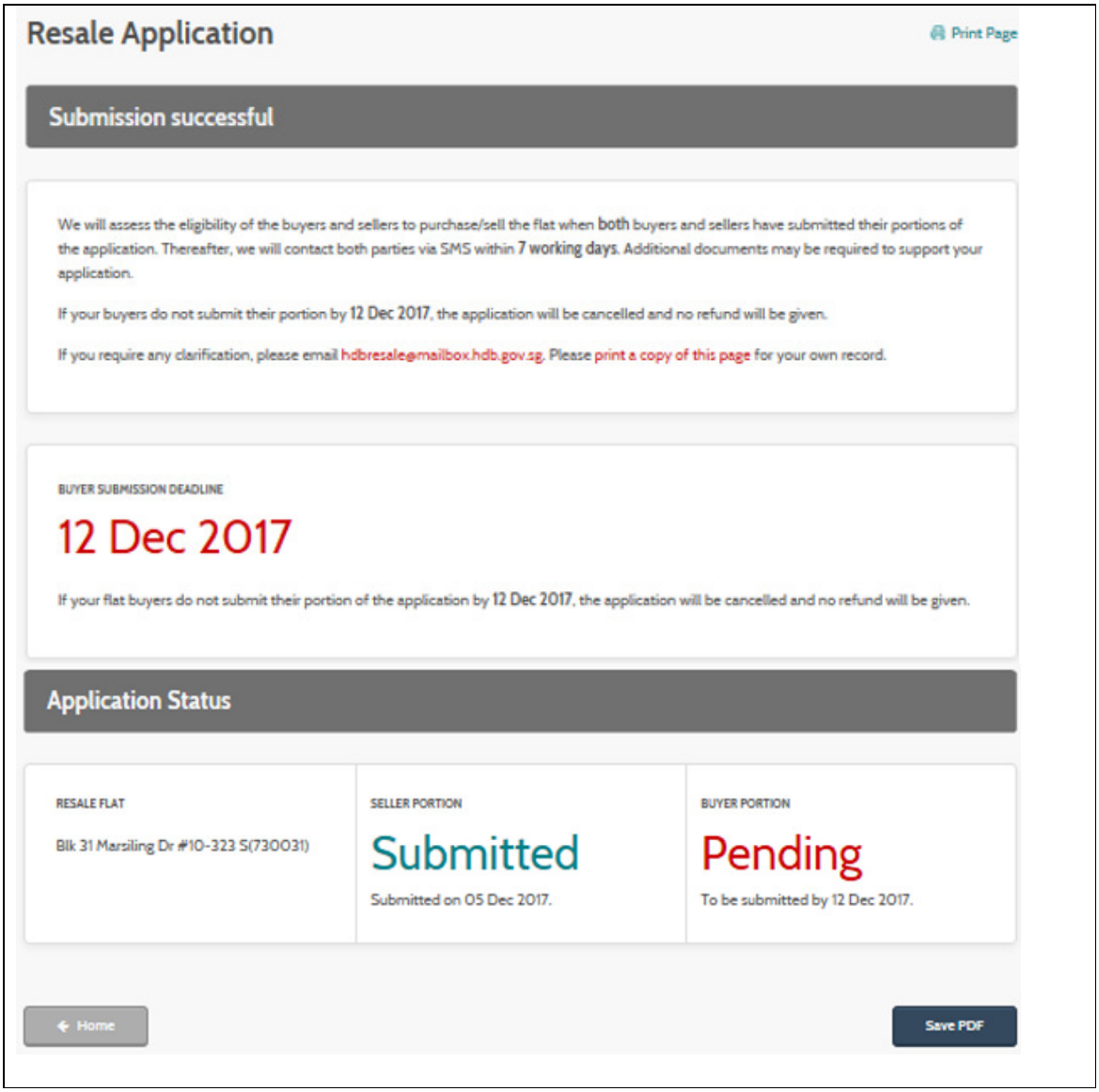


(l) The payment page will be displayed. Click **Submit** to proceed with the submission of application.

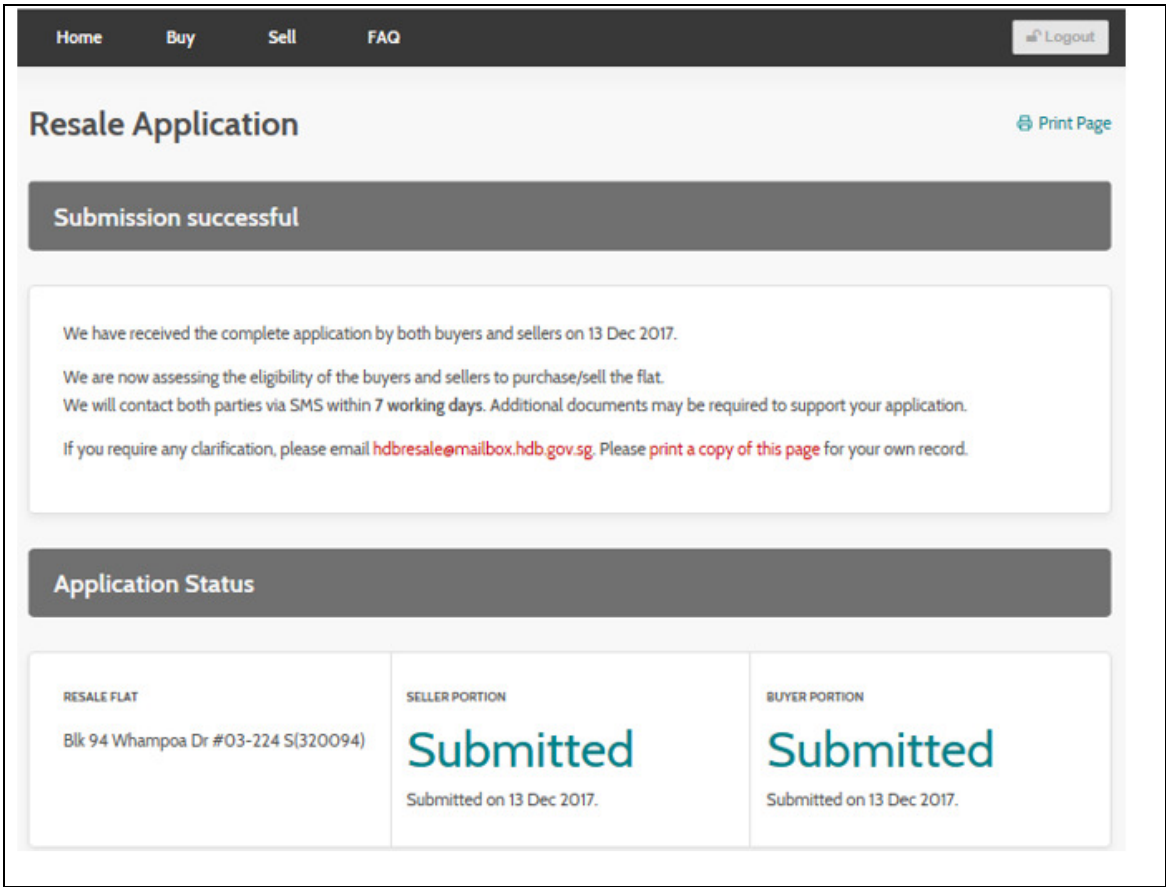


(m) Acknowledgement page

(i) This acknowledgement page will be displayed to the first party who has submitted the resale application.



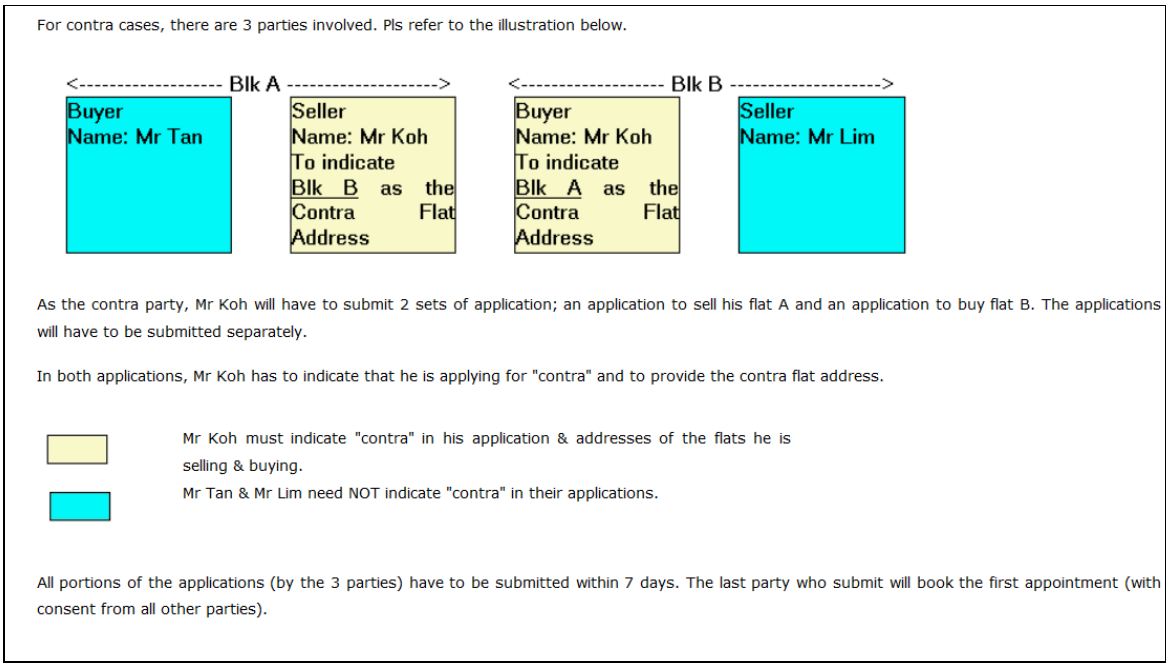
(ii) This acknowledgement page will be displayed to the last party who has submitted the resale application.



In scenario where the Option Grant Date is before 1 Jan 2018, the last party who submits the resale application may book the First Appointment date. You may refer to Chapter 5 for the steps relating to the booking of First Appointment.

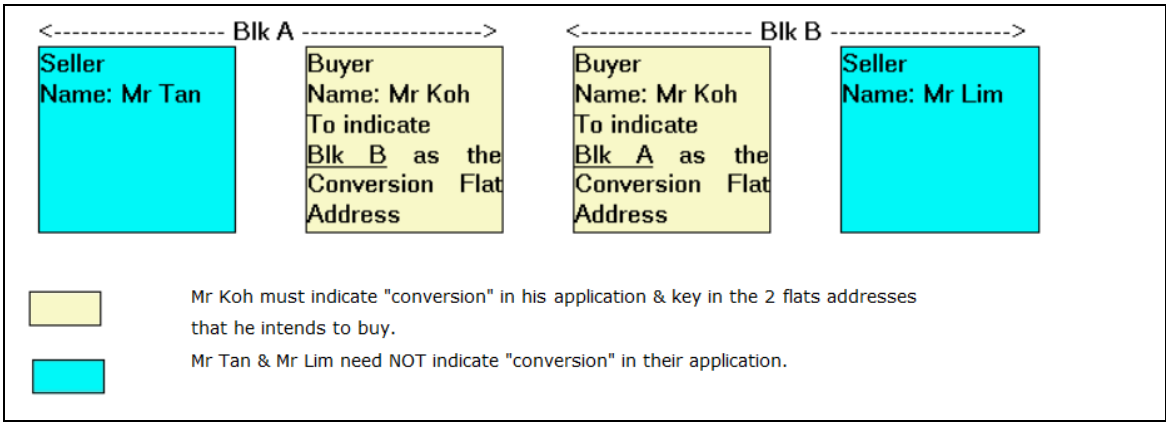
3.3 Submitting a pair of contra cases

Those who intend to apply for the Enhanced Contra Facility (ECF) are required to indicate it in the application form. They will also be required to provide the two flat addresses in the application.



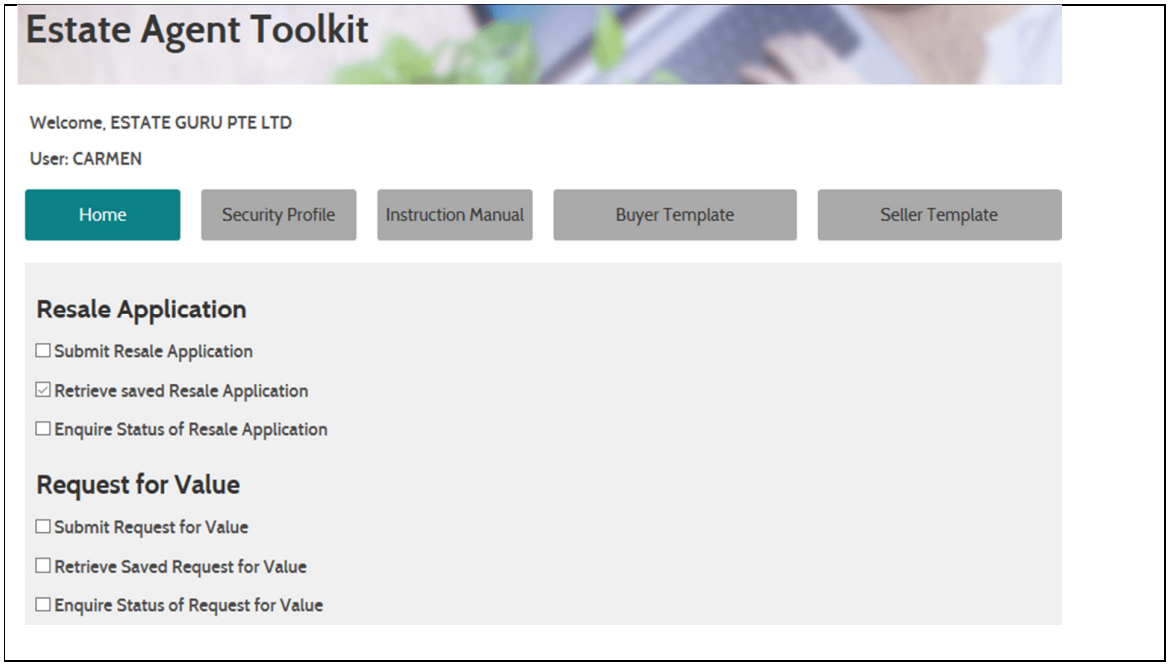
3.4 Submitting an application to buy Two Adjoining Flats under the Conversion Scheme

Please refer to the illustration below.

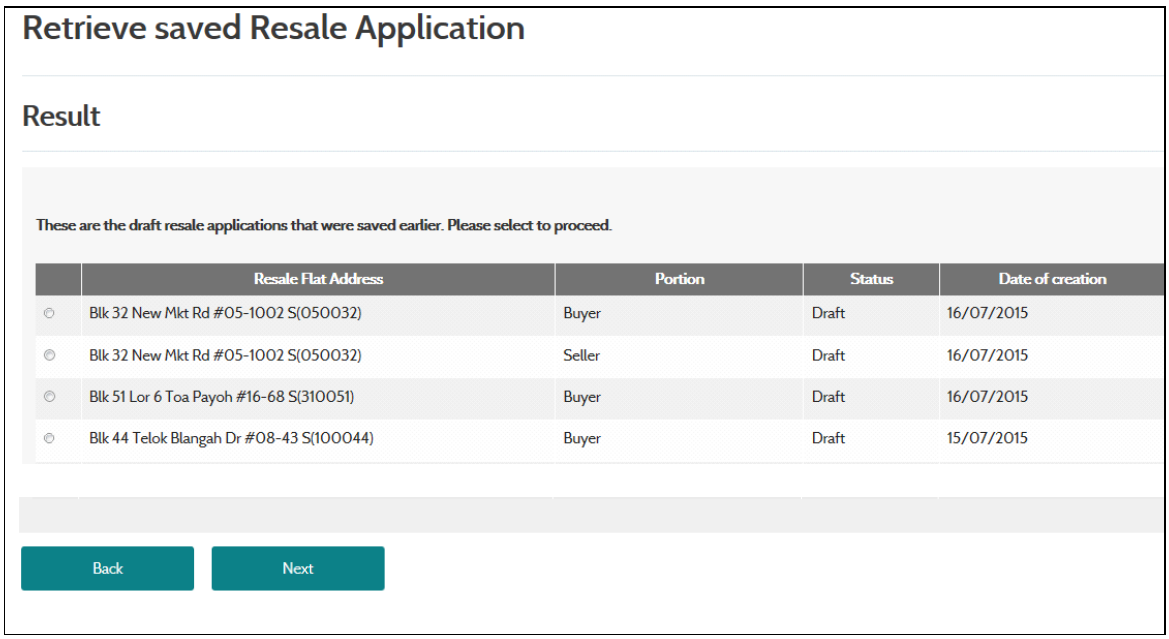


3.5 Retrieving a saved resale application

(a) Select the checkbox “Retrieve saved Resale Application”.



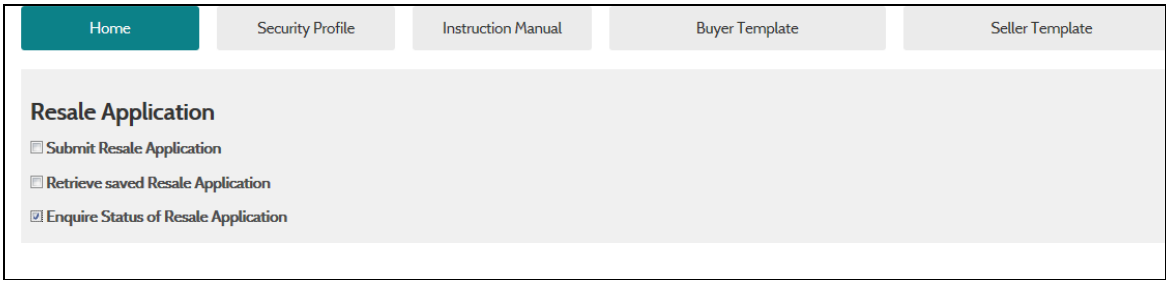
(b) Indicate the resale flat address and click **Next**.



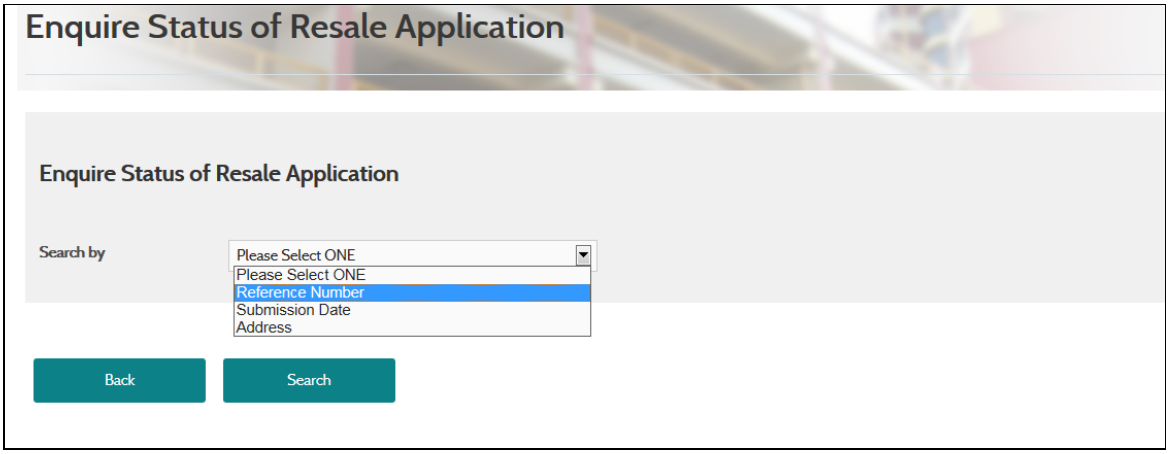
The saved resale application will be retrieved and you may proceed from there.

3.6 Checking status of resale application

(a) Select the checkbox “Enquire Status of Resale Application” and click **Next**.



(b) You may narrow your search by specifying the search criteria.



Reference Number

To search by reference number, please enter the reference number of the resale case.

Submission Date From/ Submission Date To

To search the resale application based on the date of submission of the resale application. This is the date when HDB first receives the buyer’s or seller’s portion of the resale application. The date should not be a future date and the format shall be DD/Month/YYYY.

Address

To search the resale application based on the address of the resale flat.

(c) Click **Search**. The resale application that matches your criteria will be displayed on the following page.



During the course of submission, the CorpPass login screen will pop up when the session is inactive for some time. In such situation, the Admin User or General User may keep the Toolkit session active by keying in the CorpPass once again.

3.7 Deciphering status of resale application

With illustrative examples, this segment aims to provide an understanding of the progress of resale application submission and their corresponding status.

Status Description

AA – HDB has received the complete resale application and the first appointment has been scheduled.
Note: Only cases where Option Grant Date is on or after 1 Jan 2018 will have first appointment date.

SA – HDB has received the complete resale application and the case is now being processed.

SU – HDB has received the buyer's or seller's portion of the resale application. Still pending the submission of the resale application from the last party.

BG – Still pending the booking of the first appointment date by the last party.
Note: Only cases where Option Grant Date is on or after 1 Jan 2018 will have this status.

LP – The resale application submitted by the first party has lapsed as the second party did not submit his portion of the resale application within 7 days.

RE – The resale application has been rejected by HDB.

CH – The resale application has been cancelled by HDB.

Example 1: Submitting a resale application

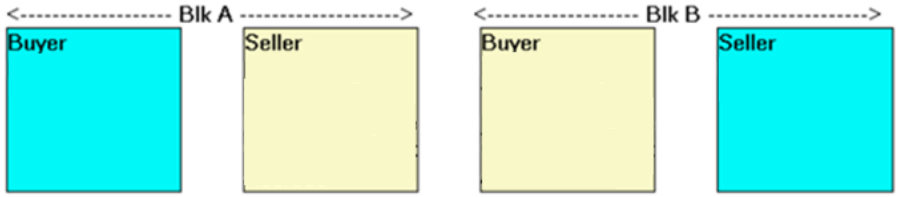


Portion	Buyer	Seller
Sequence*	1st	2nd
Estate Agent	AAA Pte Ltd	BBB Pte Ltd

* This example is for the purpose of illustration only. Either buyers or sellers may submit their portion of the resale application first.

Action	**Status displayed at the Estate Agent Toolkit**	
	AAA Pte Ltd	**BBB Pte Ltd**
AAA Pte Ltd has submitted the buyer's portion.	SU	
BBB has submitted the seller's portion.	AA	AA

Example 2: Submitting a pair of contra cases



Portion	**Flat A Buyer**	**Flat A Seller**	**Flat B Buyer**	**Flat B Seller**
Sequence*	1st	2nd	3rd	4th
Estate Agent	AAA Pte Ltd	BBB Pte Ltd	CCC Pte Ltd	DDD Pte Ltd

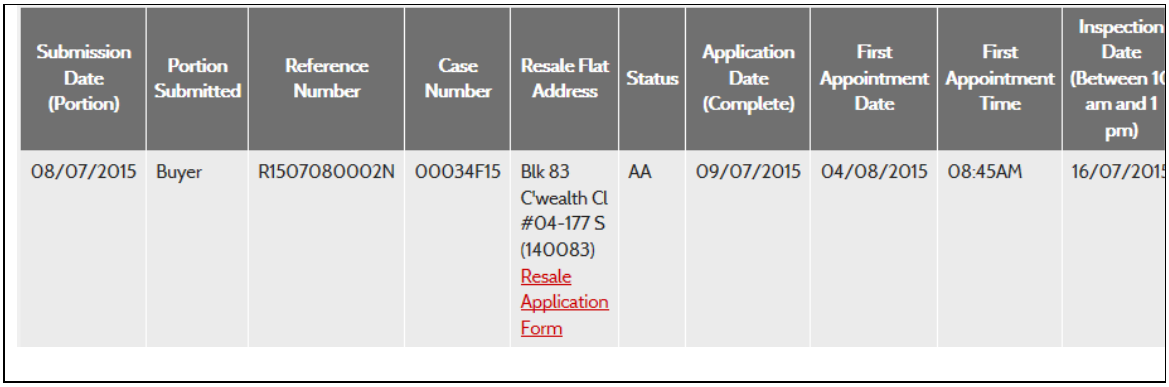
* This example is for the purpose of illustration only. Either buyers or sellers may submit their portion of the resale application first.

Action	**Status displayed at the Estate Agent Toolkit**			
	AAA Pte Ltd	**BBB Pte Ltd**	**CCC Pte Ltd**	**DDD Pte Ltd**
AAA Pte Ltd has submitted the Flat A buyer's portion.	SU			
BBB Pte Ltd has submitted the Flat A seller's portion.	SU	SU		
CCC Pte Ltd has submitted the Flat B buyer's portion.	SU	SU	SU	
DDD Pte Ltd has submitted the Flat B seller's portion.	AA	AA	AA	AA

3.8 Printing of the Resale Application Form

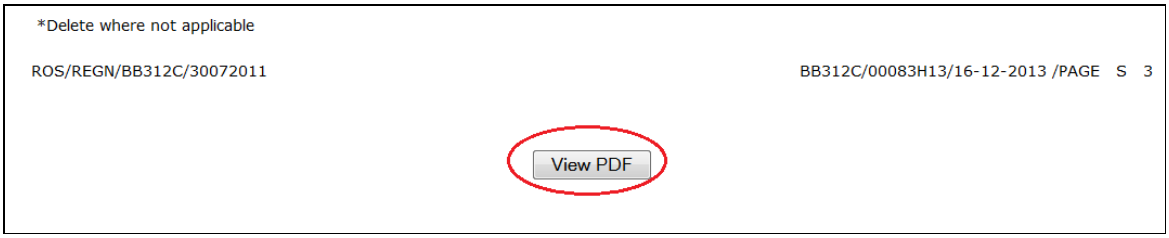
Select **Enquire status of Resale Application** (refer to 3.6). The resale application form will be availed once the status of the resale application is “AA”.

(a) Click into the Resale Application Form

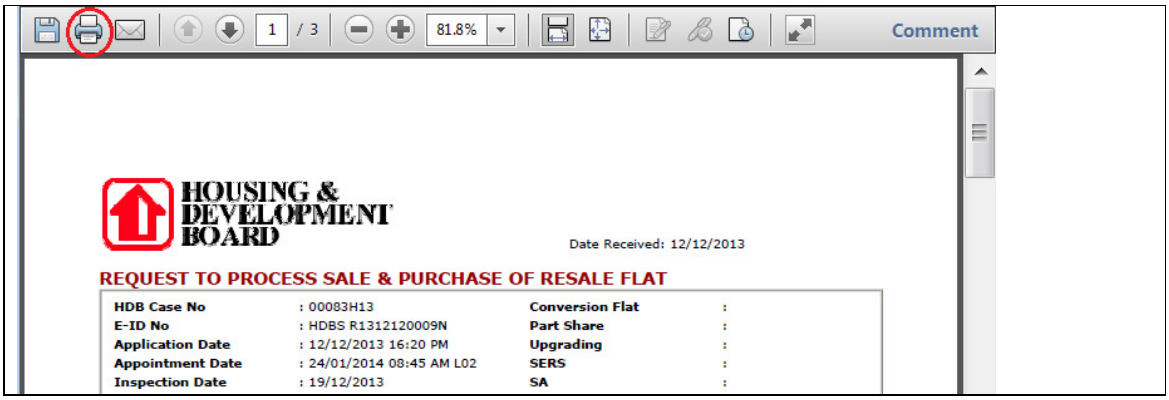


Submission Date (Portion)	Portion Submitted	Reference Number	Case Number	Resale Flat Address	Status	Application Date (Complete)	First Appointment Date	First Appointment Time	Inspection Date (Between 1(am and 1 pm)
08/07/2015	Buyer	R1507080002N	00034F15	Blk 83 C'wealth Cl #04-177 S (140083) Resale Application Form	AA	09/07/2015	04/08/2015	08:45AM	16/07/201

(b) Scroll down to the end and click **View PDF**.



(c) Click the printer icon to print the application form. If the salesperson has submitted the buyer’s portion, only the buyer’s portion of the resale application form can be printed and vice versa.



Chapter 4: Request for Value

4.1 Submitting a Request for Value

Important Notes:

(i) Buyers who intend to buy a resale flat by using their CPF moneys or a housing loan must submit a request to HDB to confirm the value that will form the basis to for determining the housing loan and CPF usage.

(ii) The Request for Value may only be submitted if the buyer has been granted an Option to Purchase (OTP) by the seller of the flat.

(iii) The buyers (or their salespersons) must submit the Request for Value by the next working day * after the Option Date. (* Monday to Friday, which is not Public Holiday)

(iv) If HDB requires a valuation of the flat, the buyers (or their salesperson) have to ensure that the flat sellers agree to allow the appointed valuers to enter the flat at any time in the day to inspect the flat.

(v) Once HDB has received the Request for Value, HDB will not accept another request for the same flat from the same buyers or different buyers, until the OTP expires.

(vi) The buyers of the flat as stated in the OTP, Request for Value and resale application must be the same.

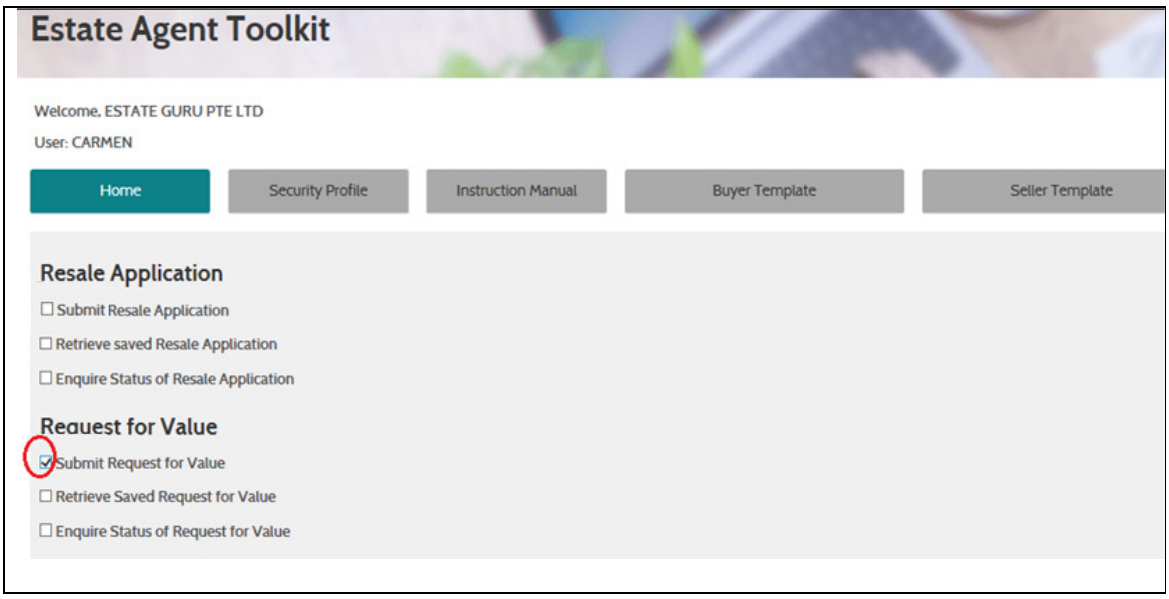
(vii) The buyers can check the status of the Request for Value via HDB Resale Portal. HDB's letter that informs the buyer of the value will remain available for viewing and download until 1 month after the resale completion.

(viii) Both buyers and sellers must comply with the requirements and procedures for the Request for Value as determined by HDB from time to time in accordance with the prevailing rules, regulations and policies. Any non-compliance of the Terms and Conditions for Request for Value will render the request as null and void and the processing fees paid will be forfeited.

To submit the Request for Value, the requestor will need to prepare the following information:

- Address of Flat
- OTP Serial Number, Option Grant Date, Purchase Price and Option Fee
- Scanned copy of **page 1** of the OTP (Need to attach a scanned copy of page 1 of the OTP in your Request for Value. File attachment has to be lesser than 5.0 MB and in PDF, JPG, GIF, TIF or PNG file format. Filename must not exceed 90 characters.
- Flat seller's name, NRIC number, contact numbers and email address
- **All buyers' names and NRIC numbers**
- Contact details of 1 buyer
- Requestor's contact numbers and email address

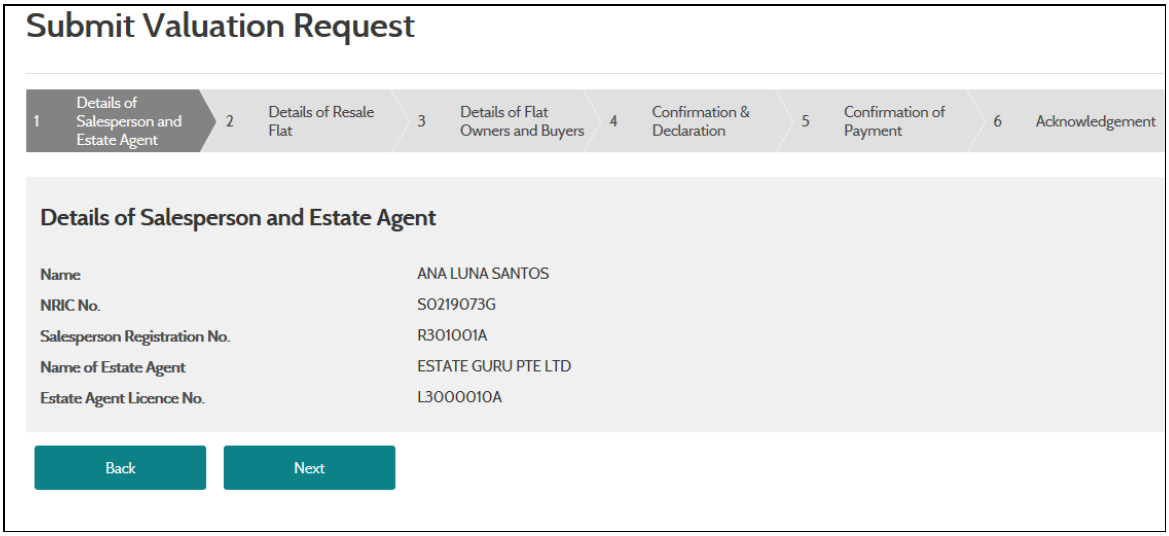
(a) Select the checkbox "Submit Request for Value" and click **Next**.



(b) Key in the NRIC of the **buyer(s) salesperson** and click **Next**.



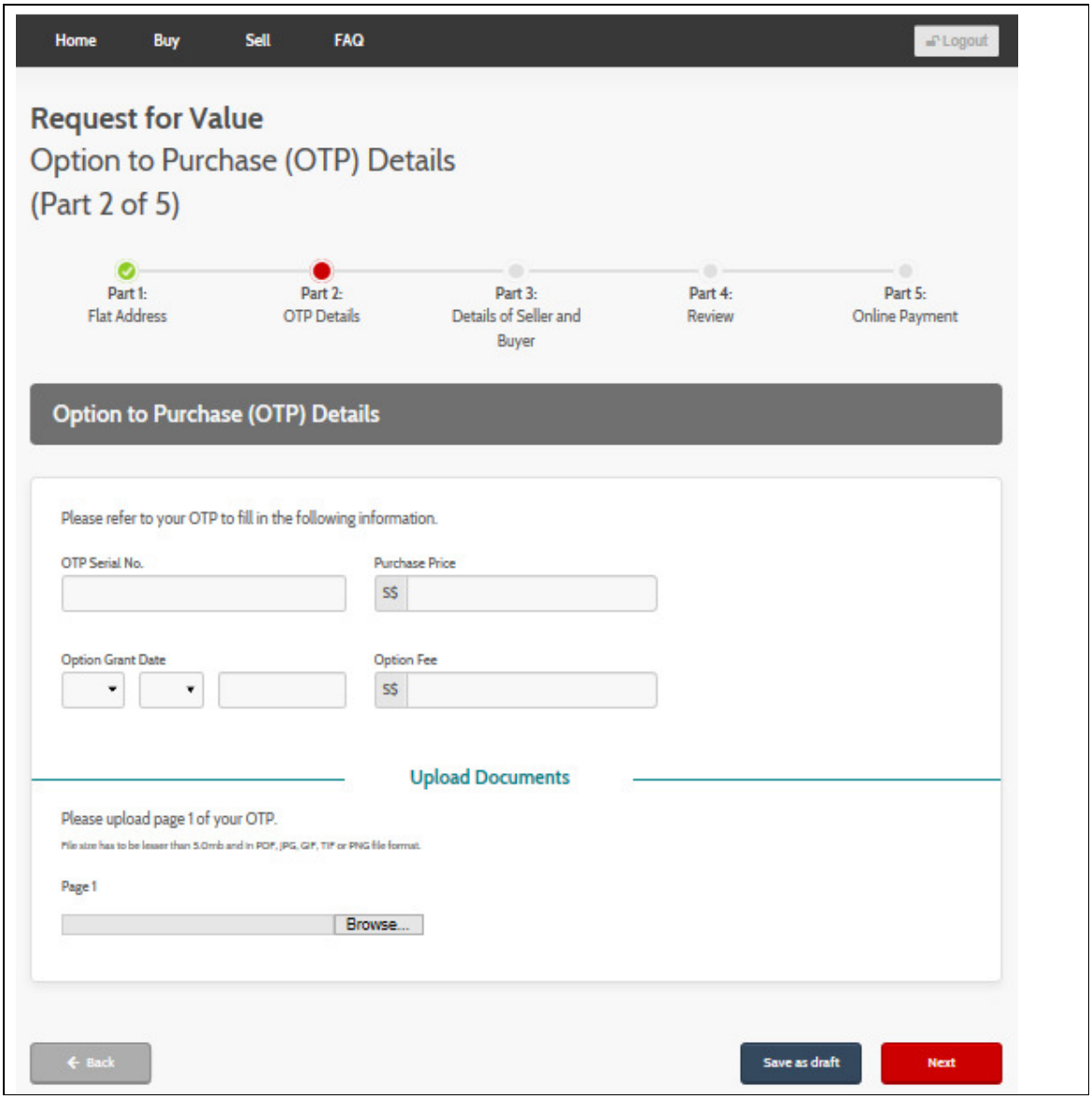
(c) The particulars of the salesperson requestor will be retrieved from CEA and displayed accordingly. Verify all the information and click **Next**.



(d) Under Part 1 of 5, key in block number and click **Get Street**. Select the correct street name from the drop-down list. Enter the unit number.

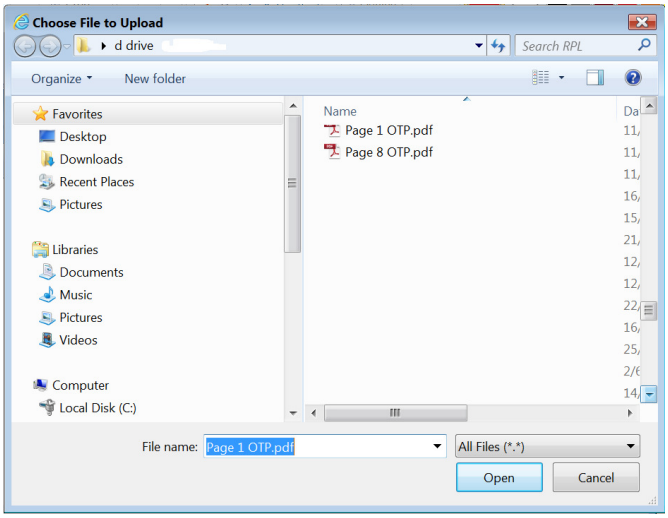


(e) Under Part 2 of 5, key in the OTP Serial Number, Option Grant Date, Purchase Price, Option Fee and proceed to upload ‘Page 1’ of the OTP.

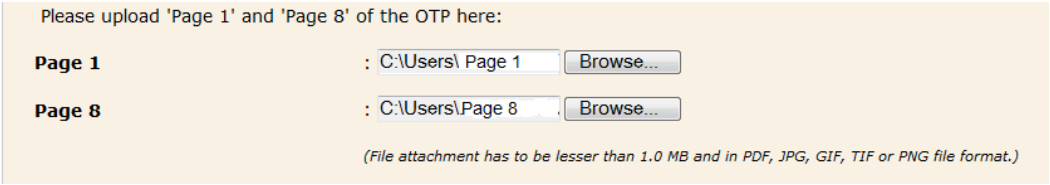


To upload the ‘Page 1’ of the OTP, click **Browse** and then select the file from the ‘Choose File to Upload’ window.

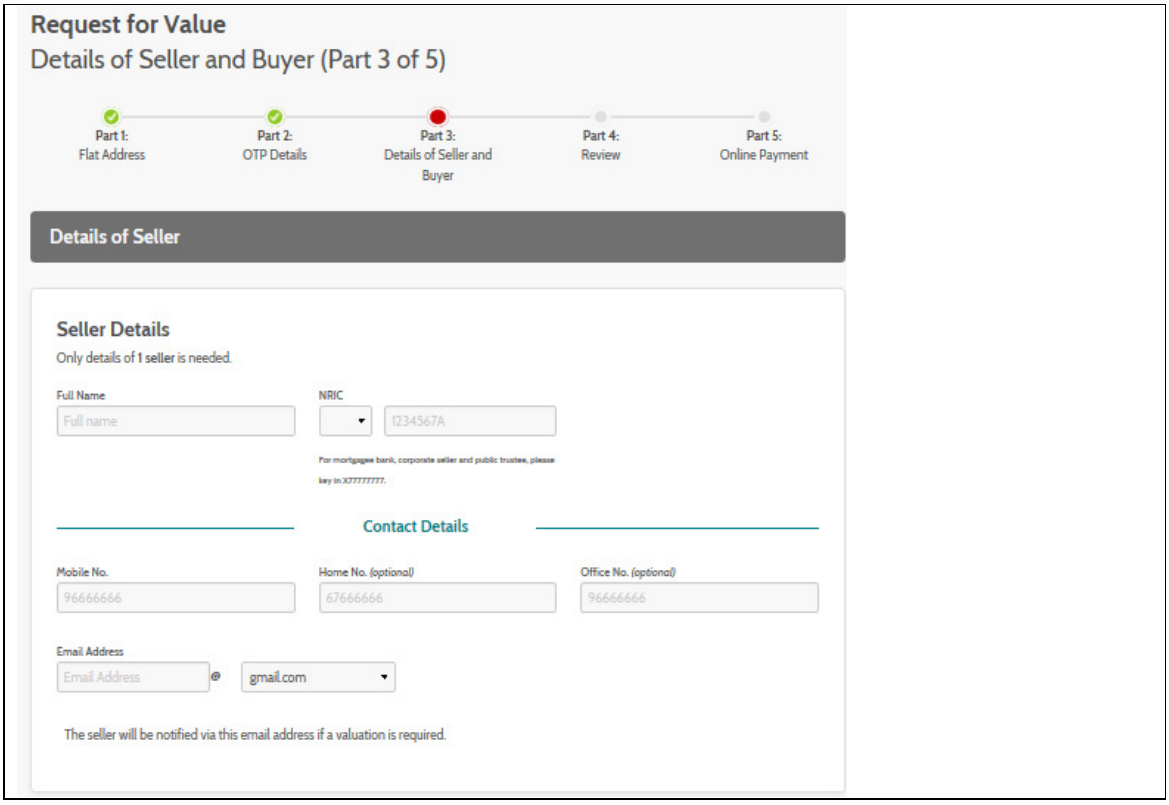
Click **Open** to upload the file.



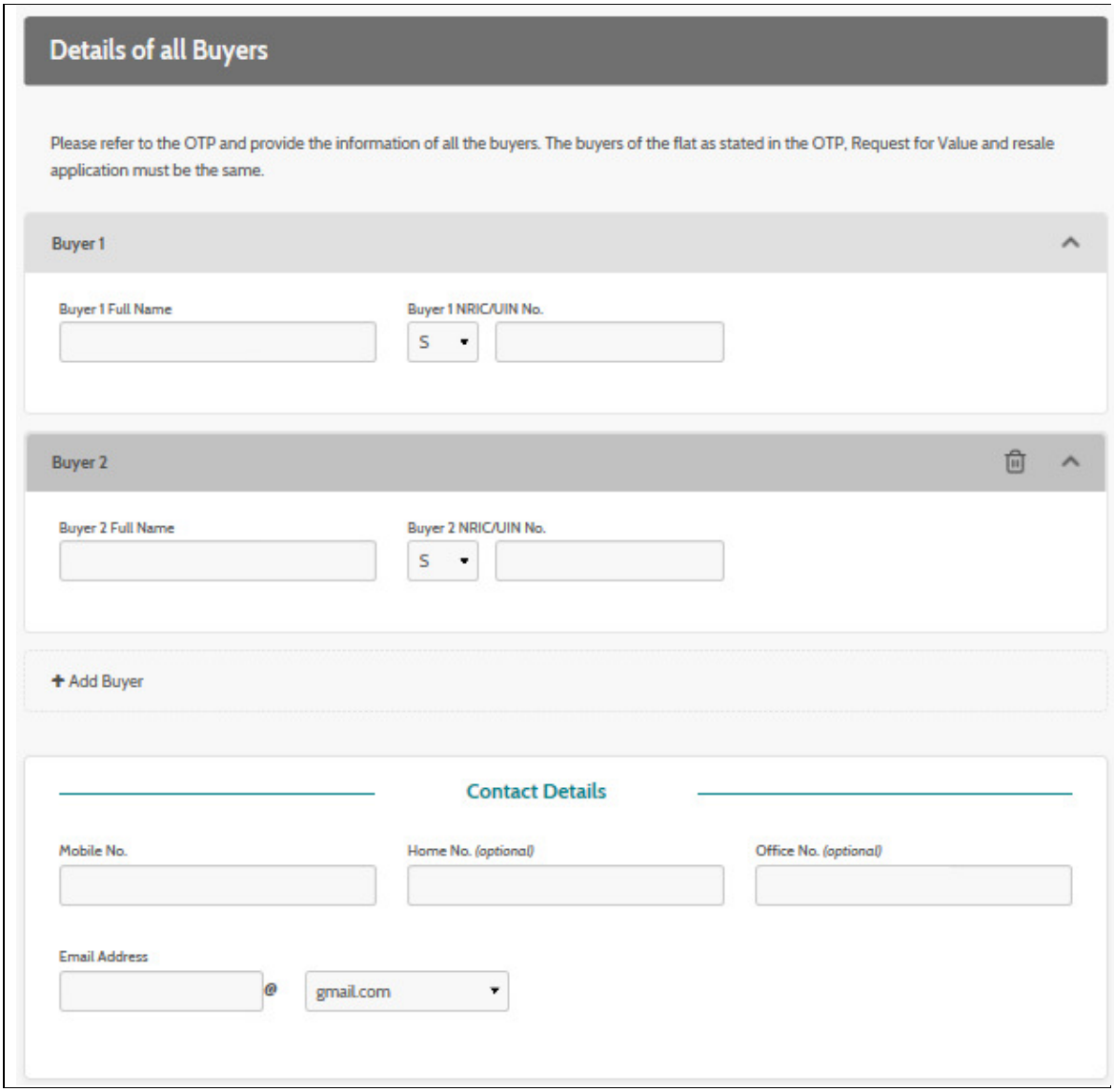
The filenames of the uploaded documents will appear in the window as shown.



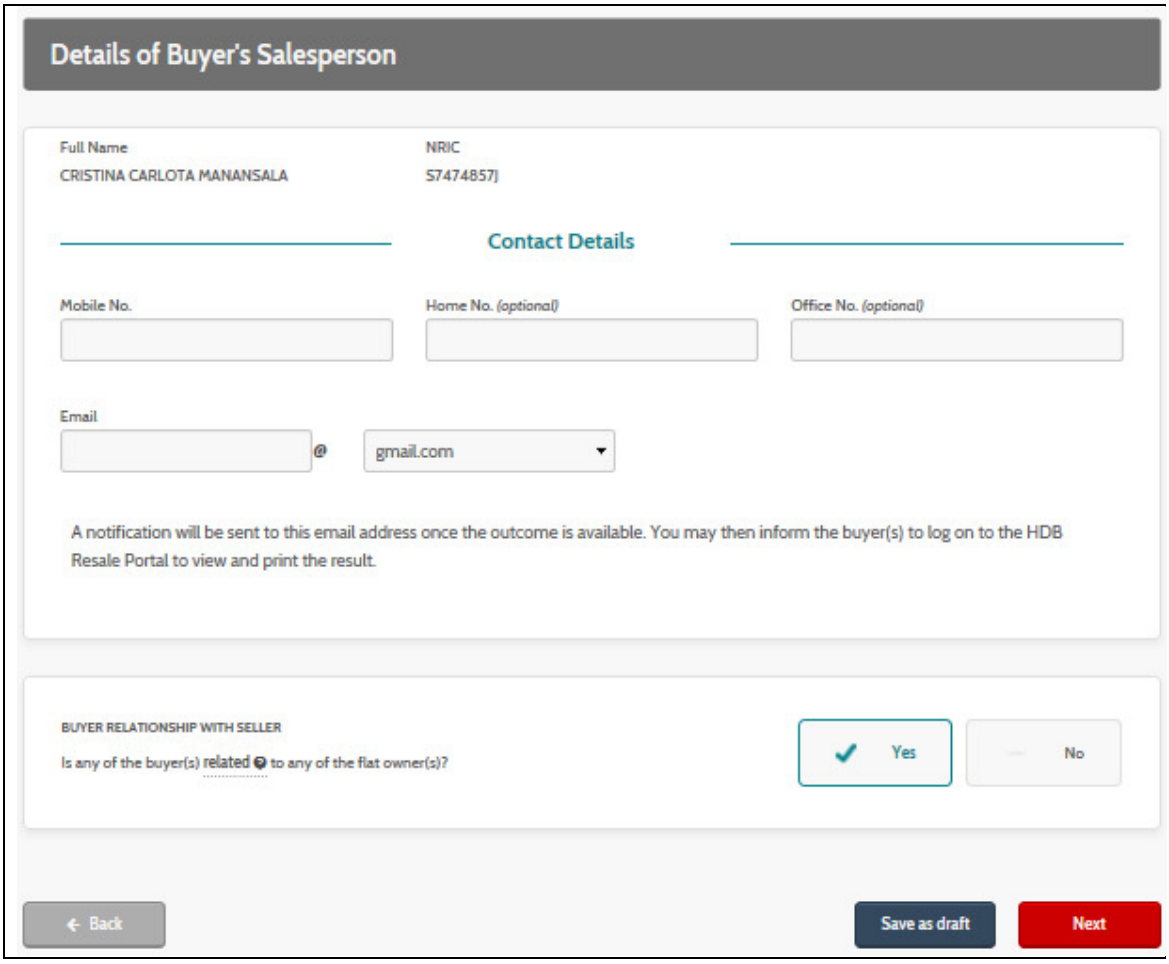
(f) Under Part 3 of 5, key in the name, NRIC, email address and at least one contact number of the seller.



(g) Under this section, key in the name and NRIC of all the buyers and provide a contact number of one of the buyers.



(h) Under this section, key in the contact number and email address of the salesperson requestor.



<u>Email Address</u>

The email address of the salesperson requestor is mandatory. Do provide a valid email address as email notifications from HDB will be sent to the salesperson's email address indicated in the online form.



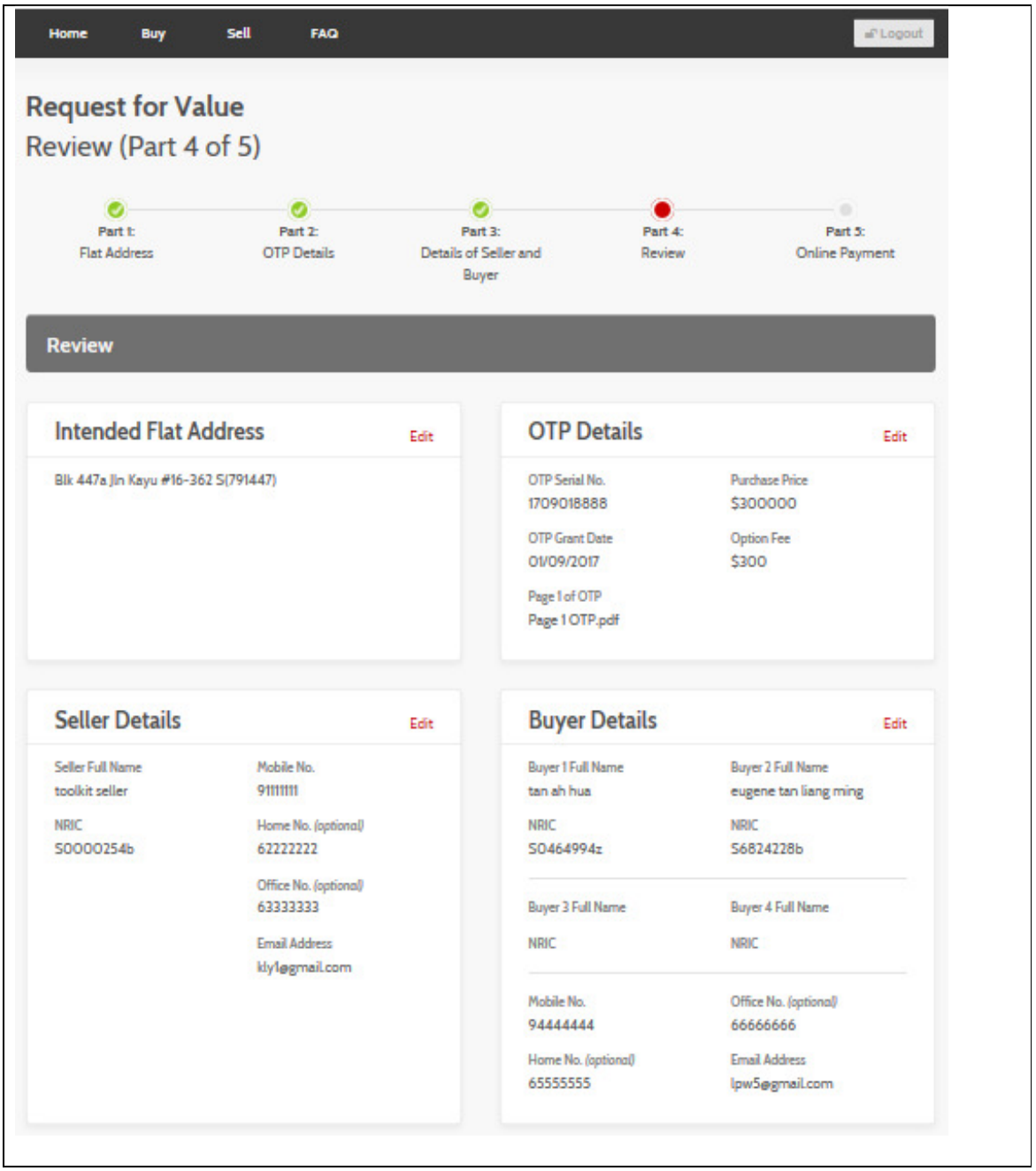
Salespersons from estate agent that has signed up for the Estate Agent Toolkit will receive two email notifications from HDB. In the first email, salesperson will receive a confirmation regarding the submission. In the second email, salesperson will be notified once the value is ready.

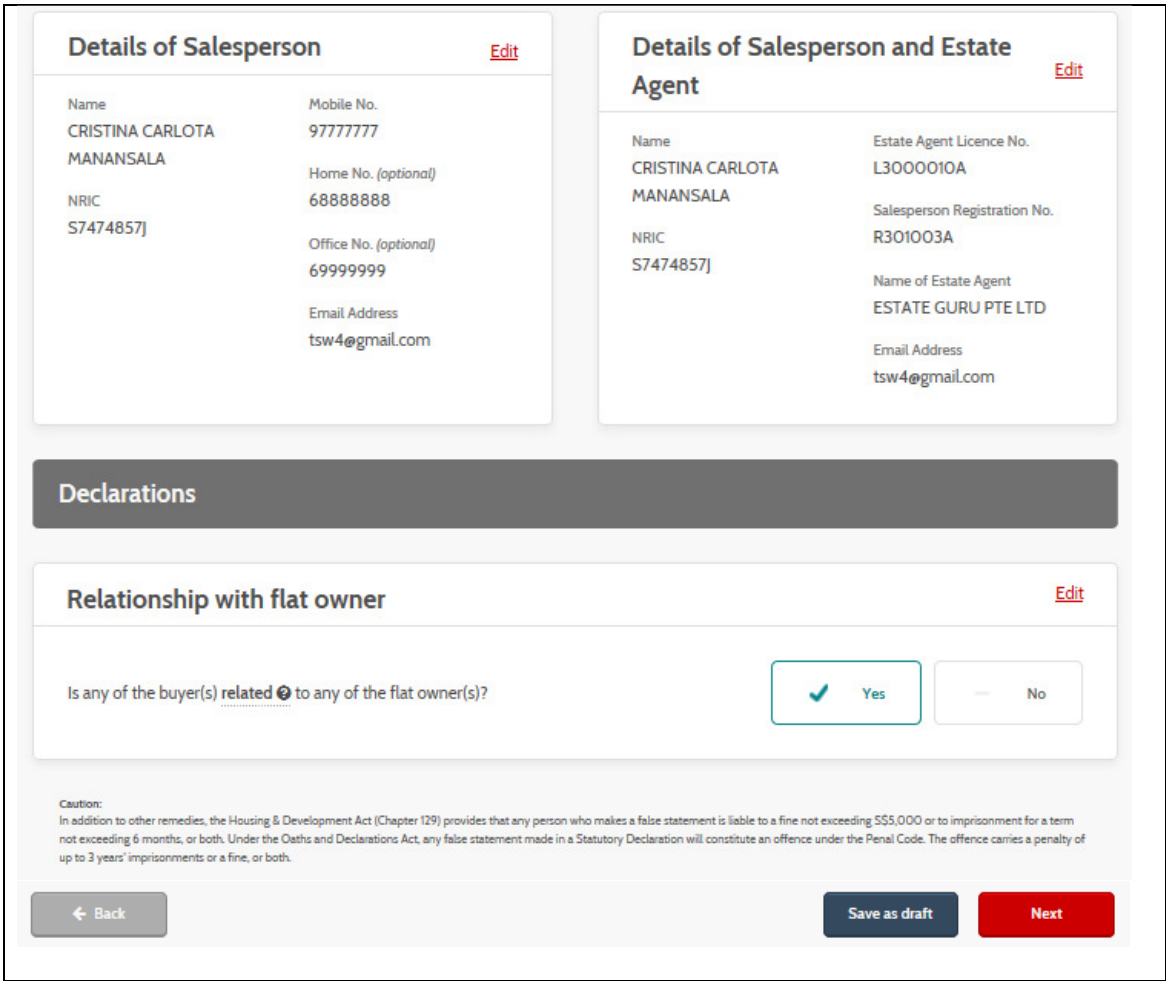
Do note that the outcome will be posted on the **<u>HDB Resale Portal (buyer needs to login)</u>** and will be available for viewing and download by the buyer until 1 month after the resale completion date.

Instruction

(i) Review the information in this summary page.

- Click **Back** to make amendments.
- Click **Next** to proceed.

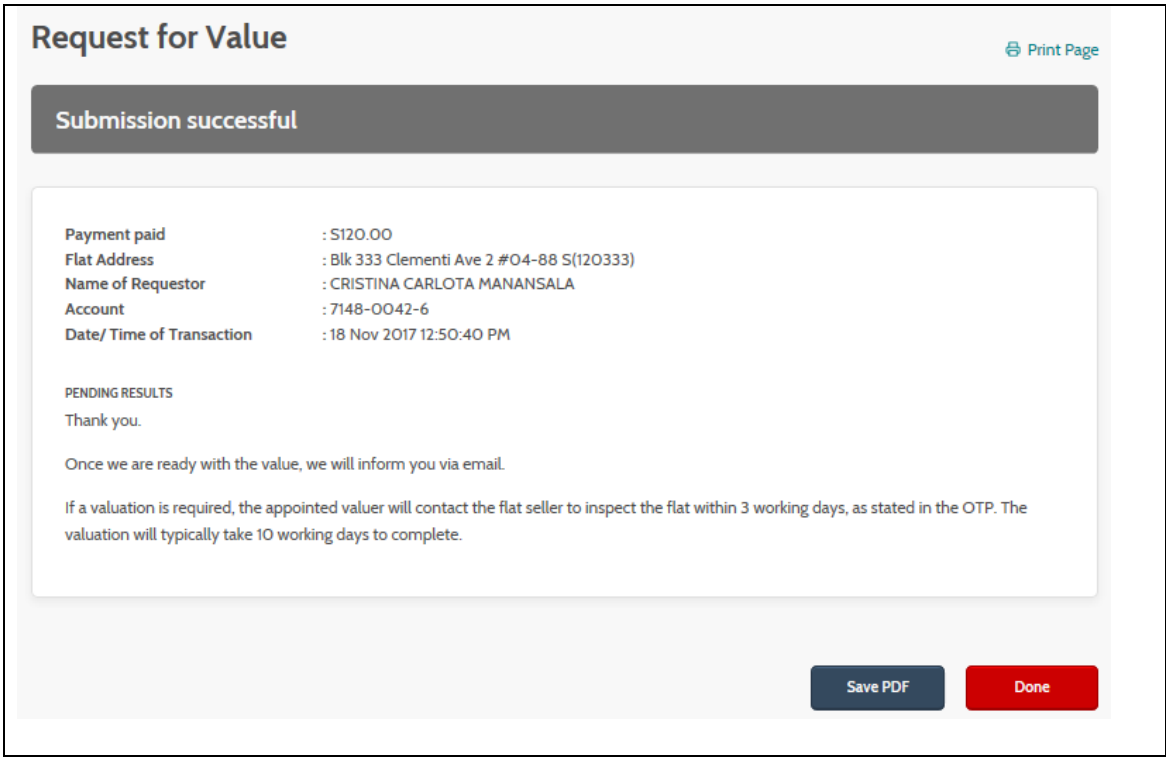




(j) The payment details will be displayed.

- Click **Submit** to confirm the transaction

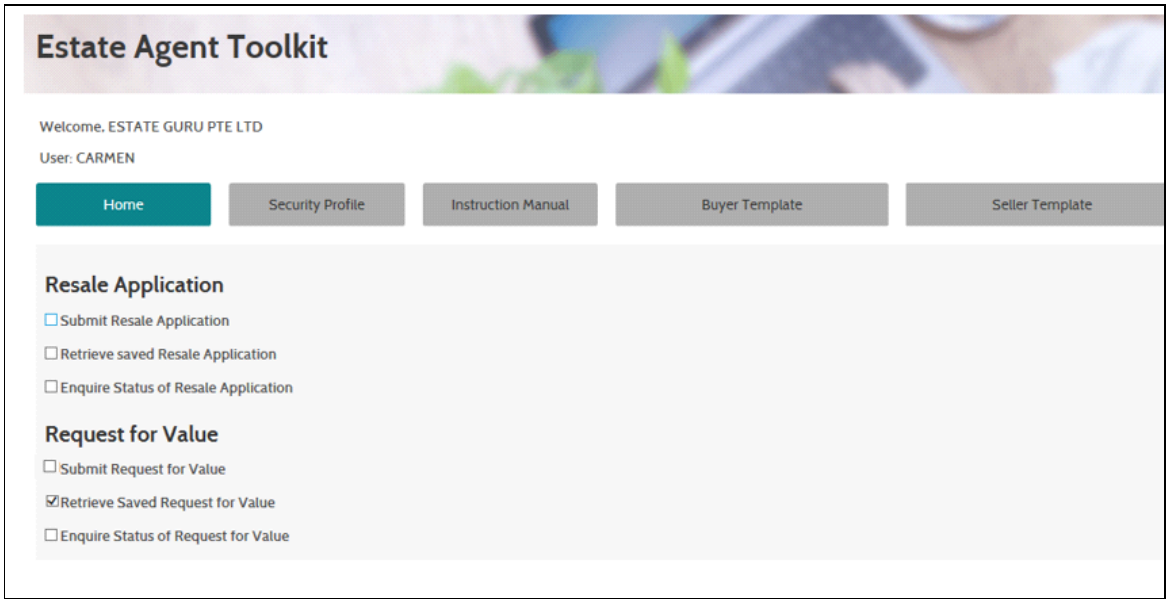
(k) You will see an acknowledgement page upon successful submission of the Request for Value.



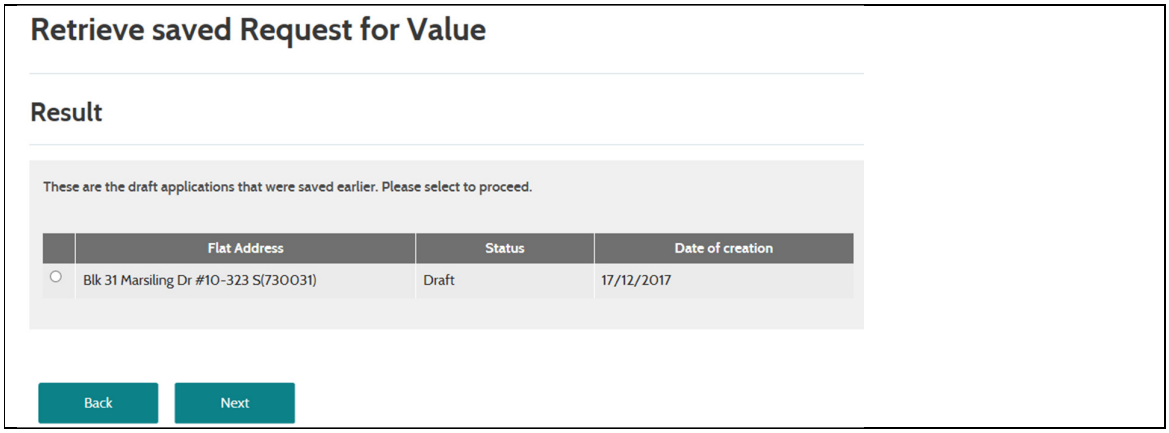
(l) Click **Done** to return to the main page.

4.2 Retrieving a saved Request for Value

(a) Select the checkbox “Retrieve Saved Request for Value” and click **Next**.



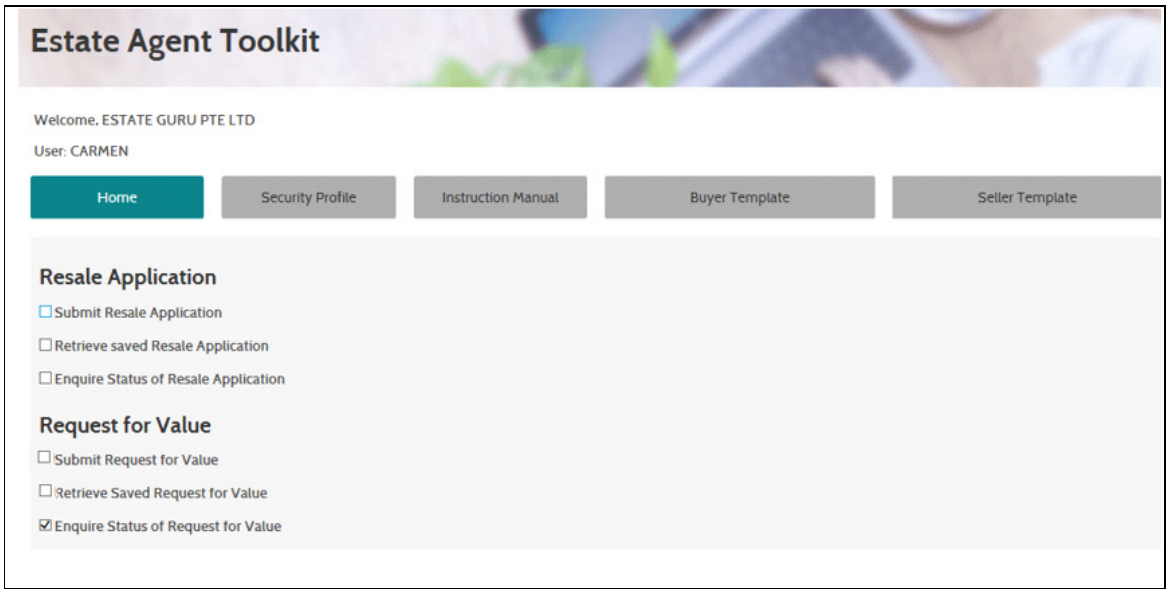
(b) Indicate the resale flat address and click **Next**.



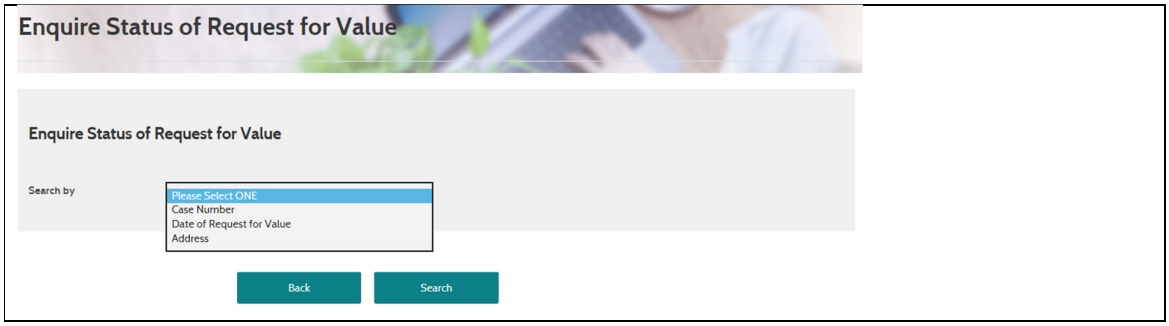
The saved Request for Value will be retrieved and you may proceed from there.

4.3 Checking status of Request for Value

(a) Select the checkbox “Enquire Status of Request for Value” and click **Next**.



(b) You may narrow your search by specifying the search criteria.



Case Number

To search by case number, please enter the Request for Value case number.

Date of Request for Value From/ Date of Request for Value To

To search the Request for Value based on the date of submission of the request. The date should not be a future date and the format shall be DD/Month/YYYY.

Address

To search the Request for Value based on the address of the resale flat.

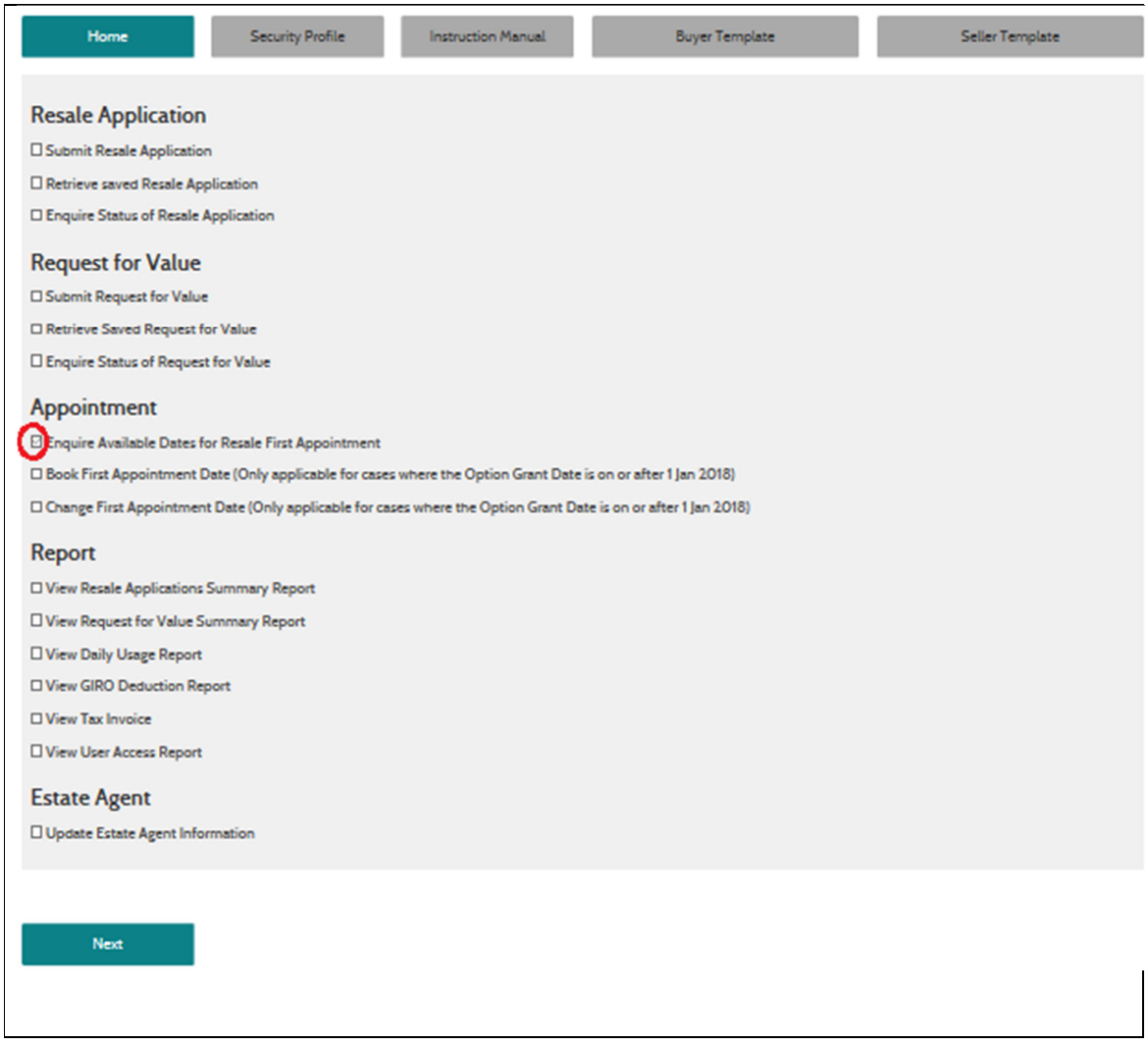
(c) Click **Search**. The Request for Value that matches your criteria will be displayed on the following page.

Chapter 5: Appointment

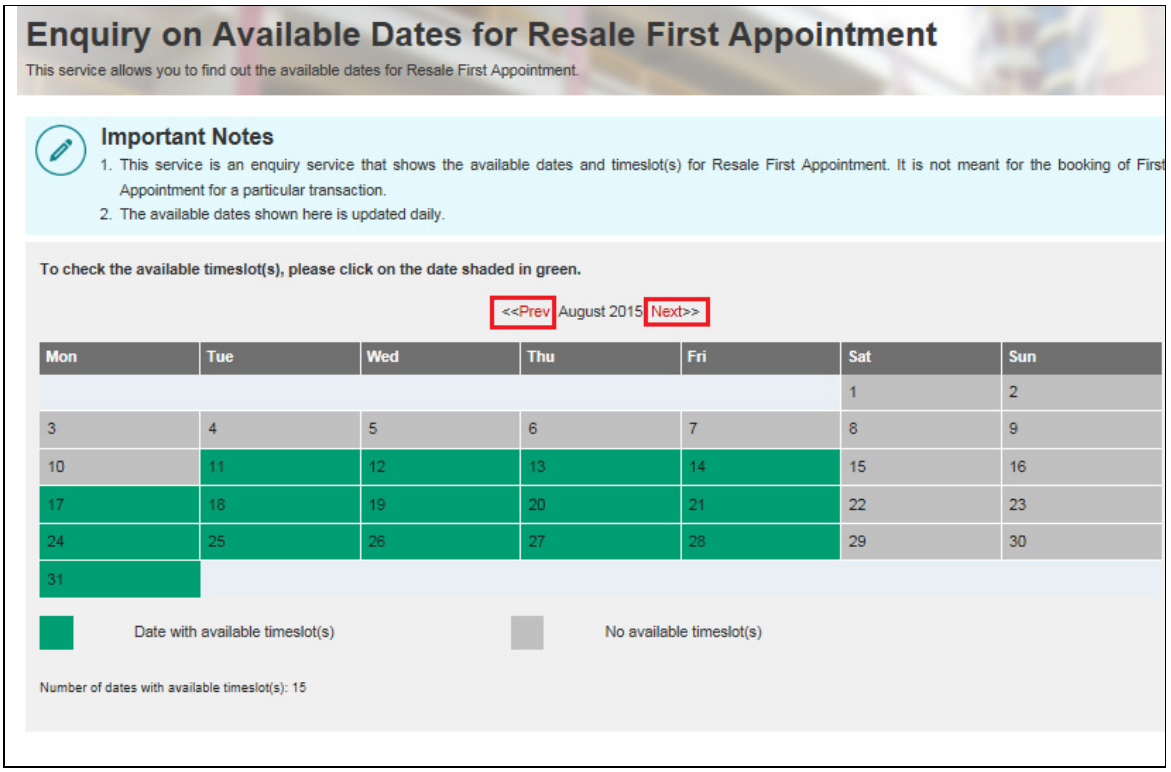
(Only applicable for cases where Option Grant Date is on or after 1 Jan 2018)

5.1 Checking available dates for First Appointment

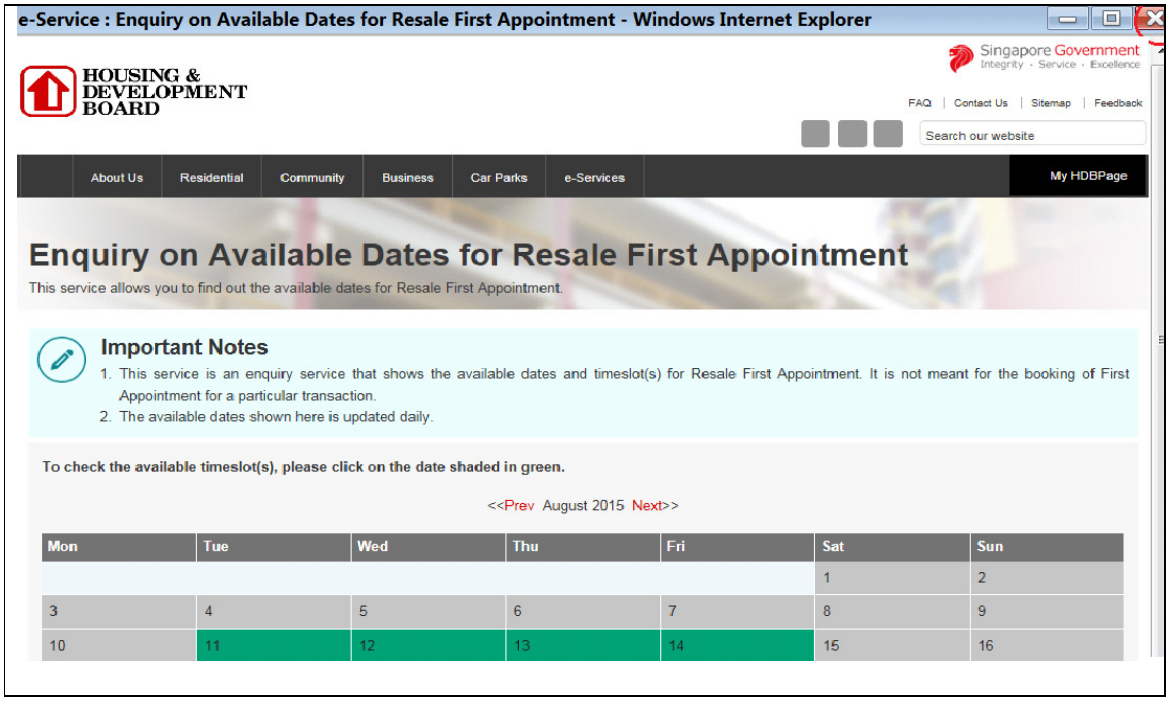
(a) Select the checkbox “Enquire Available Dates for Resale First Appointment” and click **Next**.



(b) A separate window will open up. You may enquire on the available dates for resale first appointment using the **Prev** or **Next** function key. **Do not** browse the appointment timetable using the **Back** or **Forward** button at the browser.

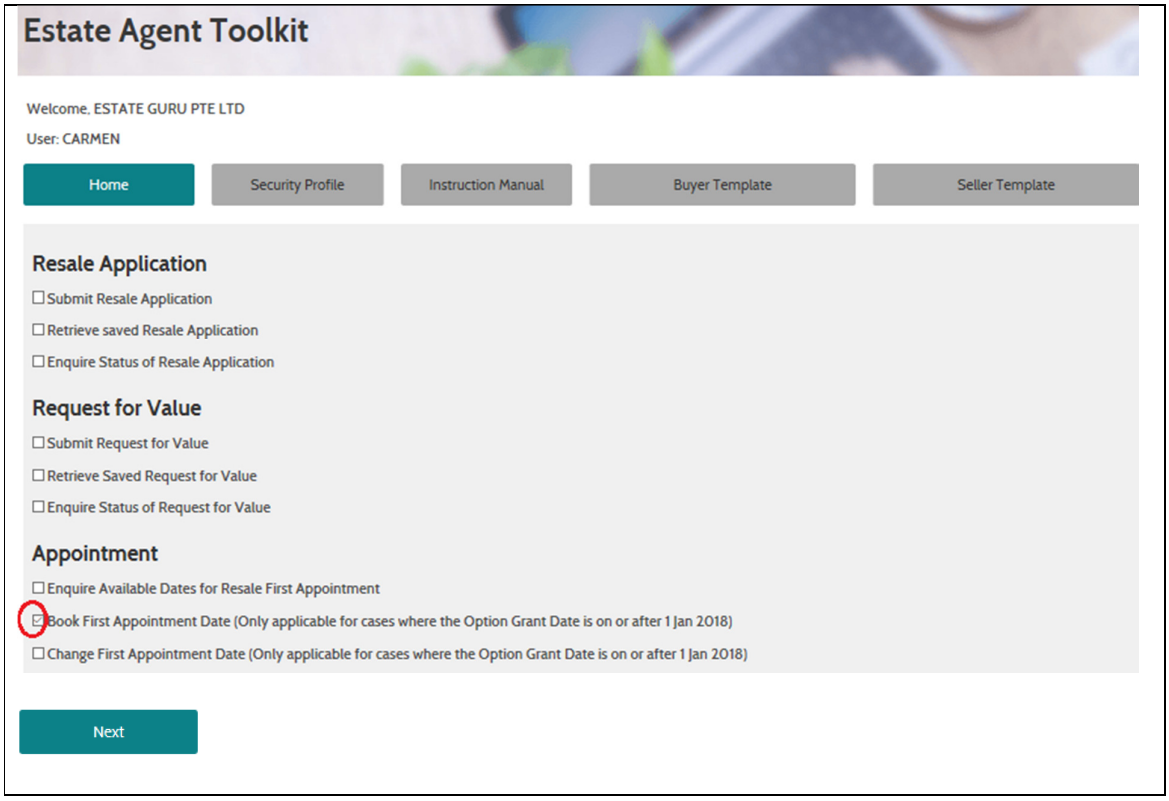


(c) Once you have a preferred date in mind, you may close the window by clicking the **X** at the top right hand corner. You will be back at the **Home** page once again.

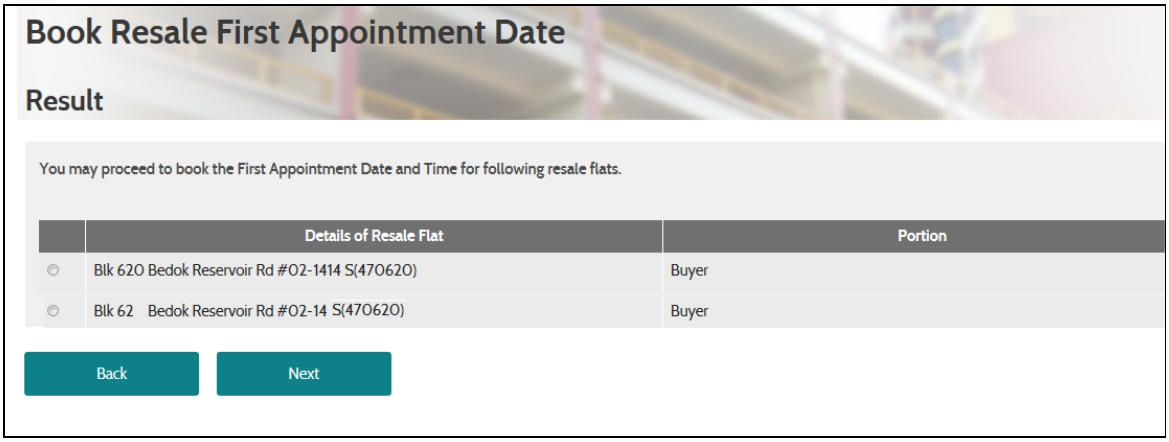


5.2 Booking of First Appointment

(a) Select the checkbox “Book First Appointment Date” and click **Next**.



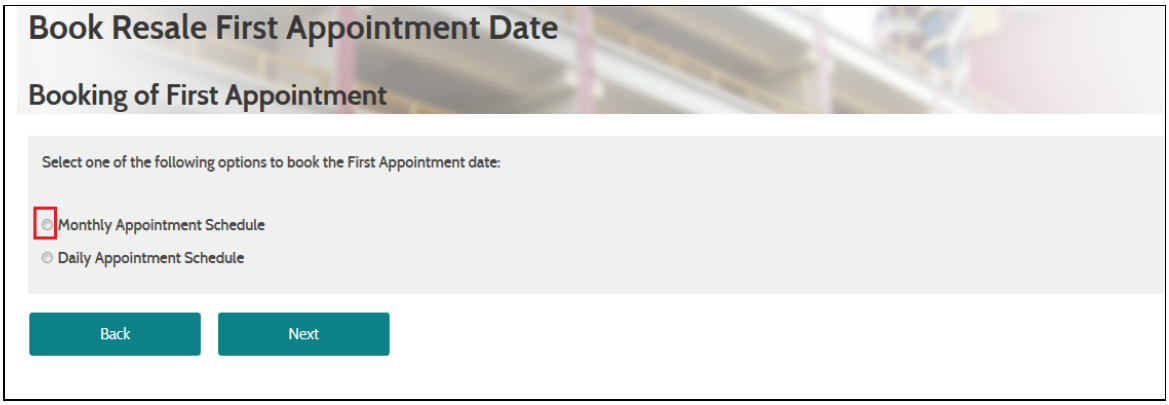
(b) All the cases that were still pending the booking of first appointment date will be displayed here. Select the desired flat address and click **next**.

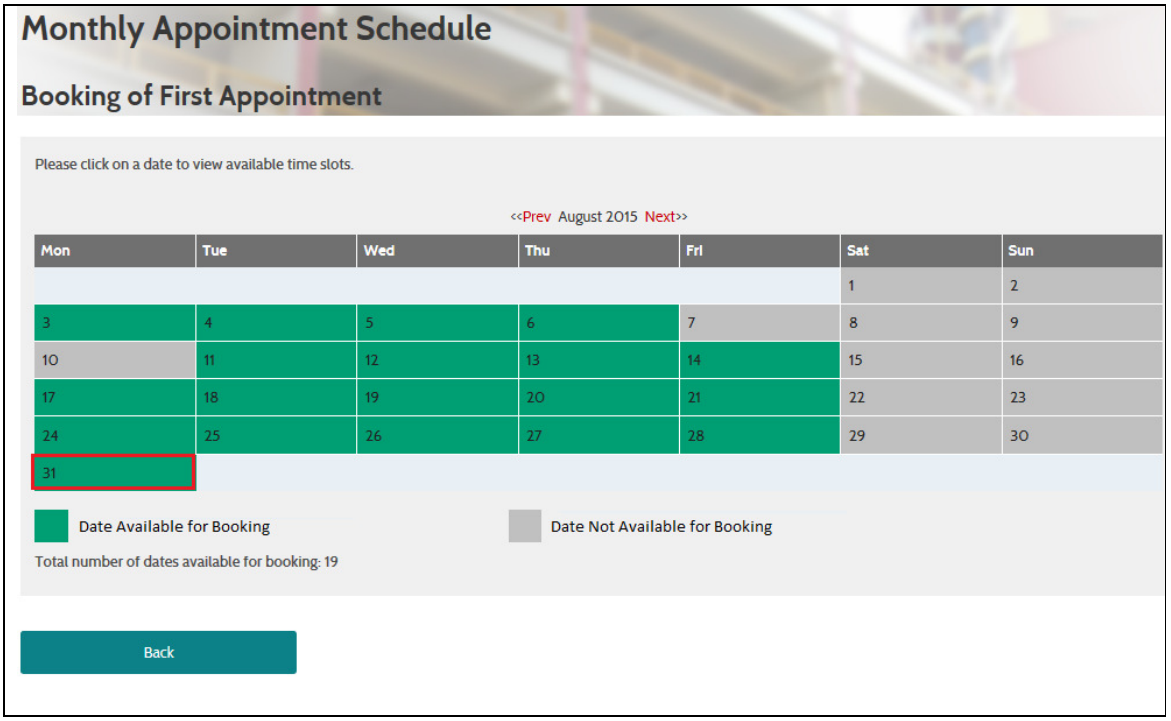


(c) You may book the available First Appointment date via the Monthly Appointment Schedule or Daily Appointment Schedule.

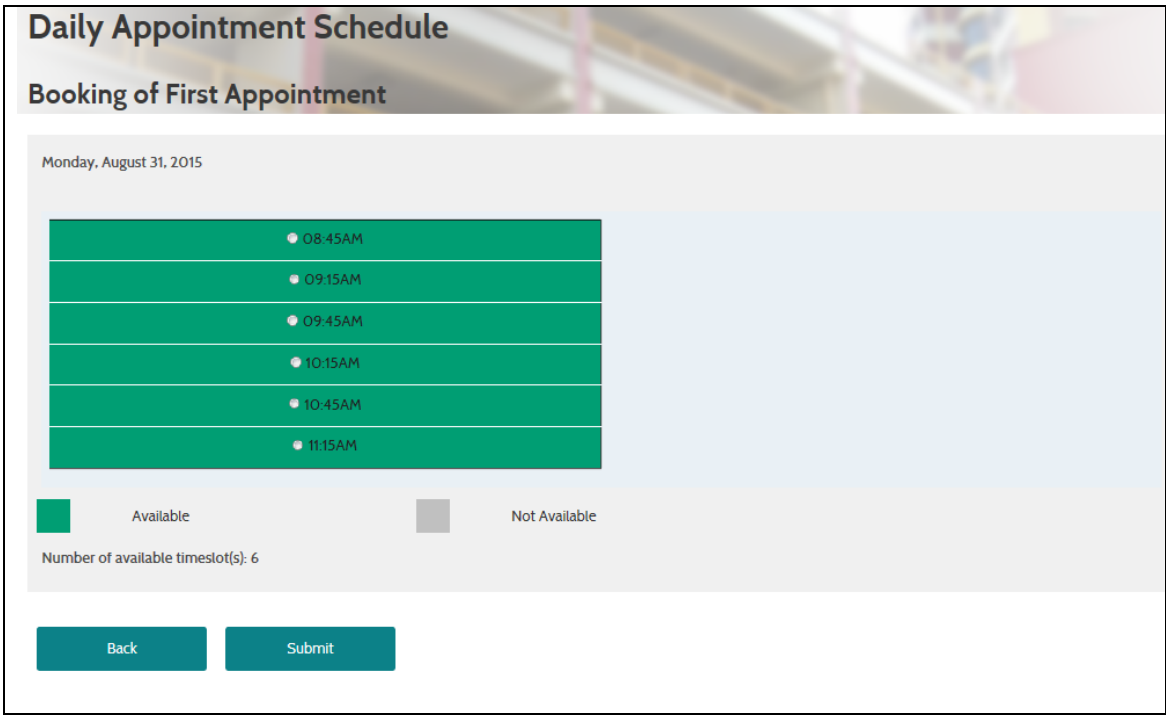
<u>Booking via the Monthly Appointment Schedule</u>

(i) When you select this option, you may view the available First Appointment dates in the monthly format before zooming in to a preferred date to book the first appointment time.

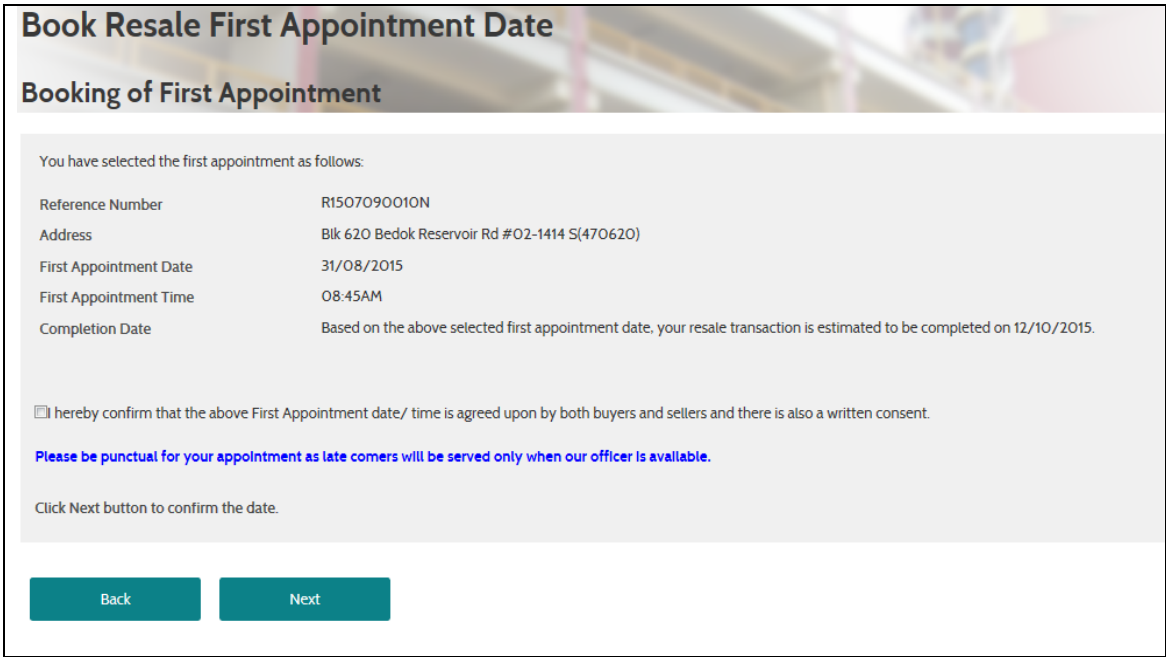




(ii) Select your preferred appointment time and click **Submit**.

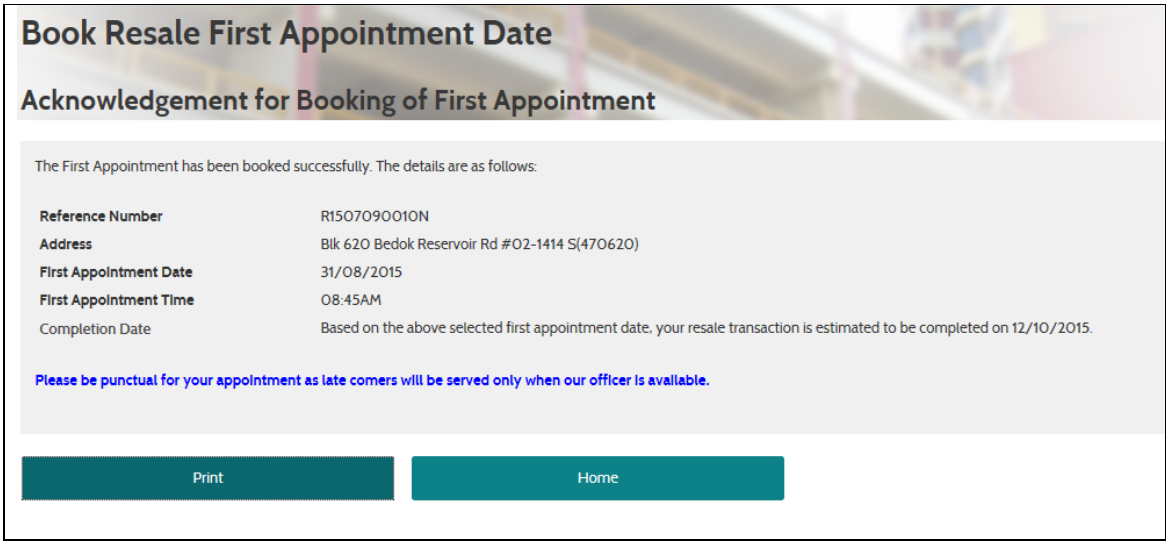


(iii) Confirmation by user that the First Appointment date/ time is agreed upon by both buyers and sellers and click **Next**.



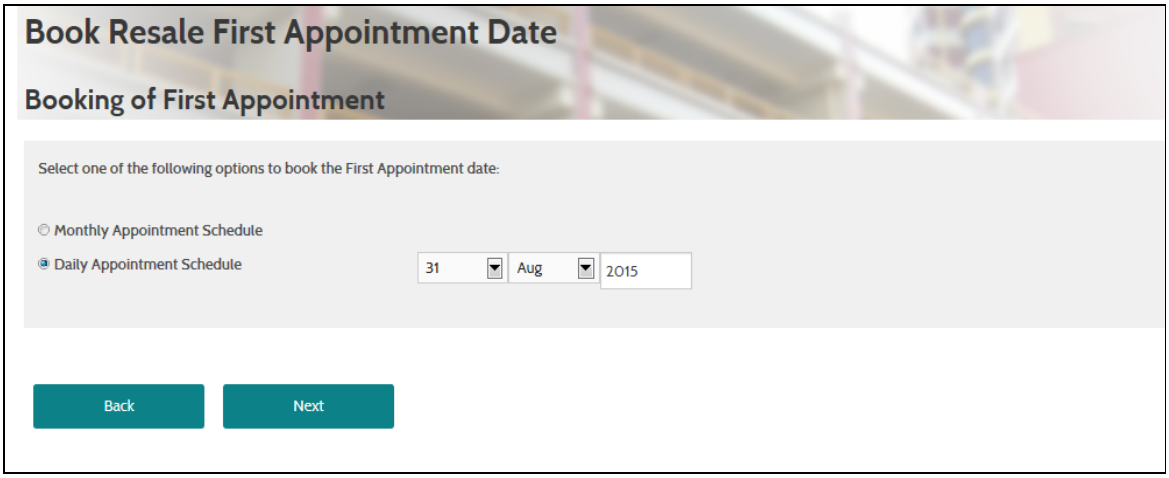
(iv) Once the booking of First Appointment is successful, the following acknowledgement page will be displayed.

You may click **Print** to print a copy of this acknowledgement page or you may click **Home** to return to the Home page.

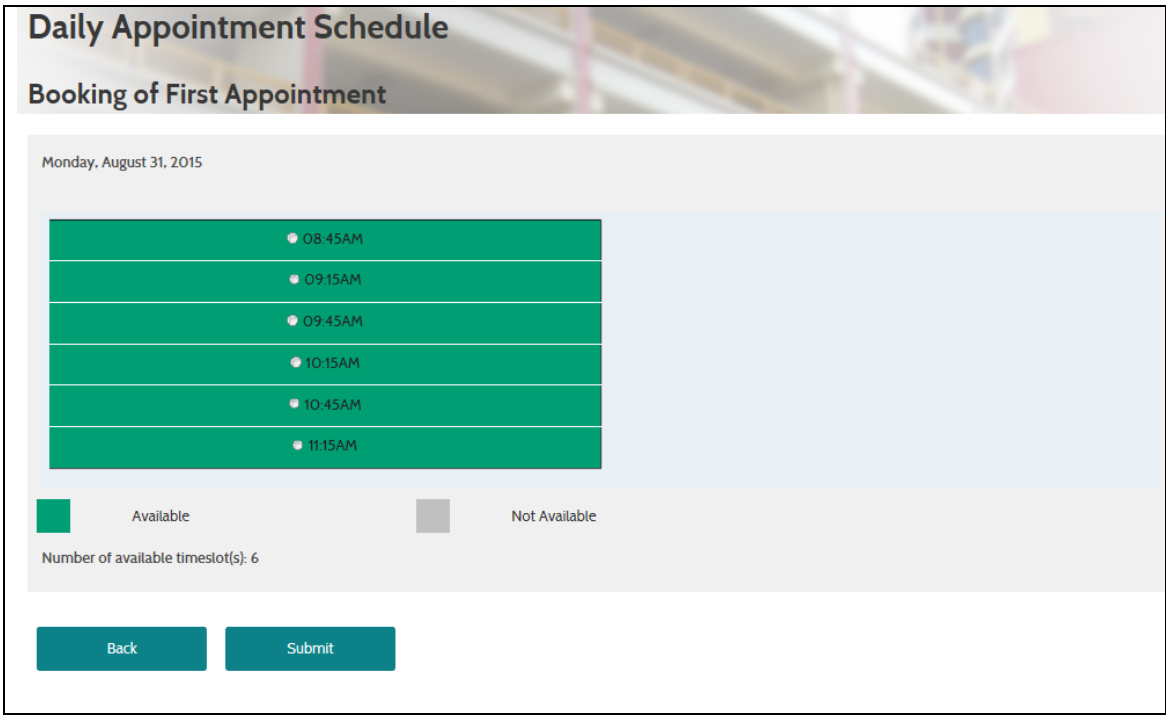


Booking via the Daily Appointment Schedule

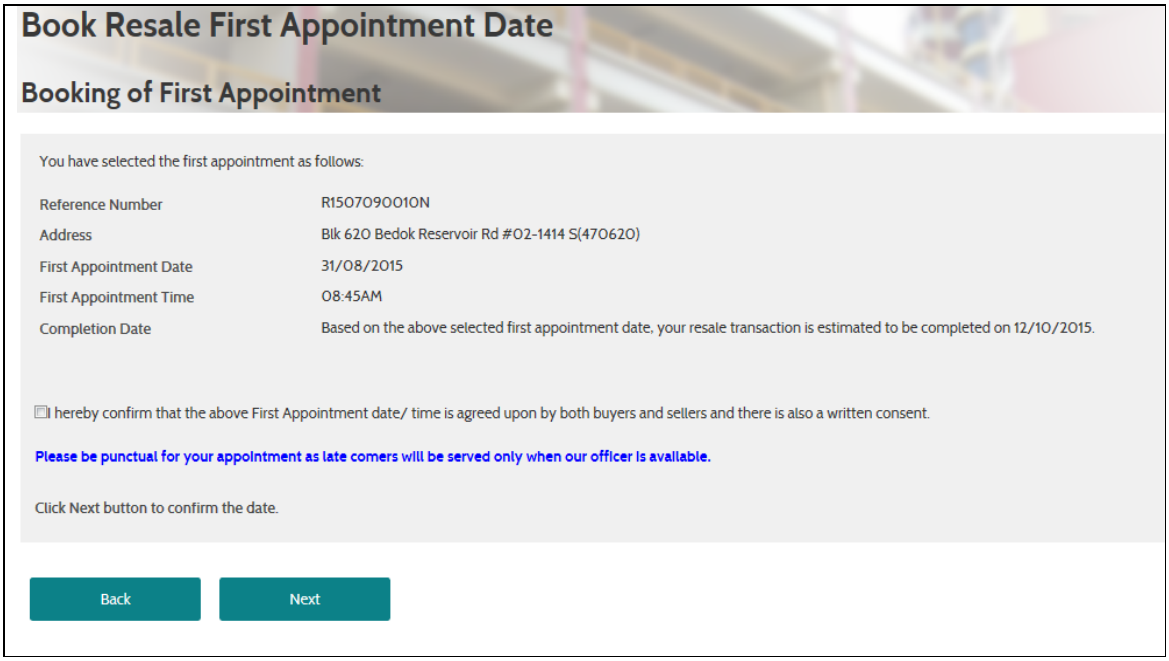
(v) Select this option if you have a preferred date in mind. Key in the date in the format as shown below and click **Next**.



(vi) Select your preferred appointment time and click **Submit**.

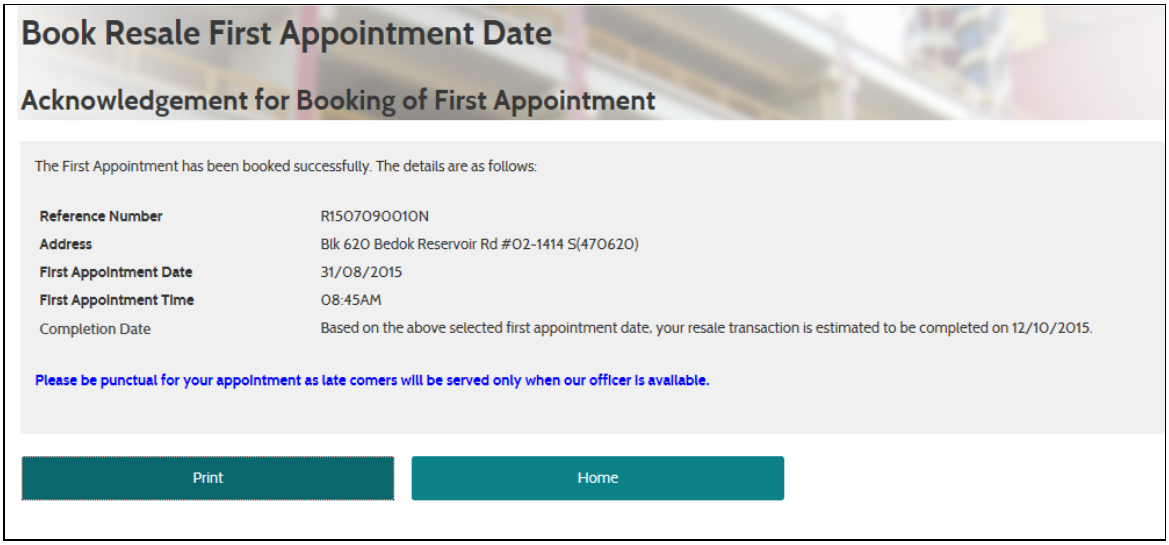


(vii) Confirmation by user that the First Appointment date/ time is agreed upon by both buyers and sellers and click **Next**.



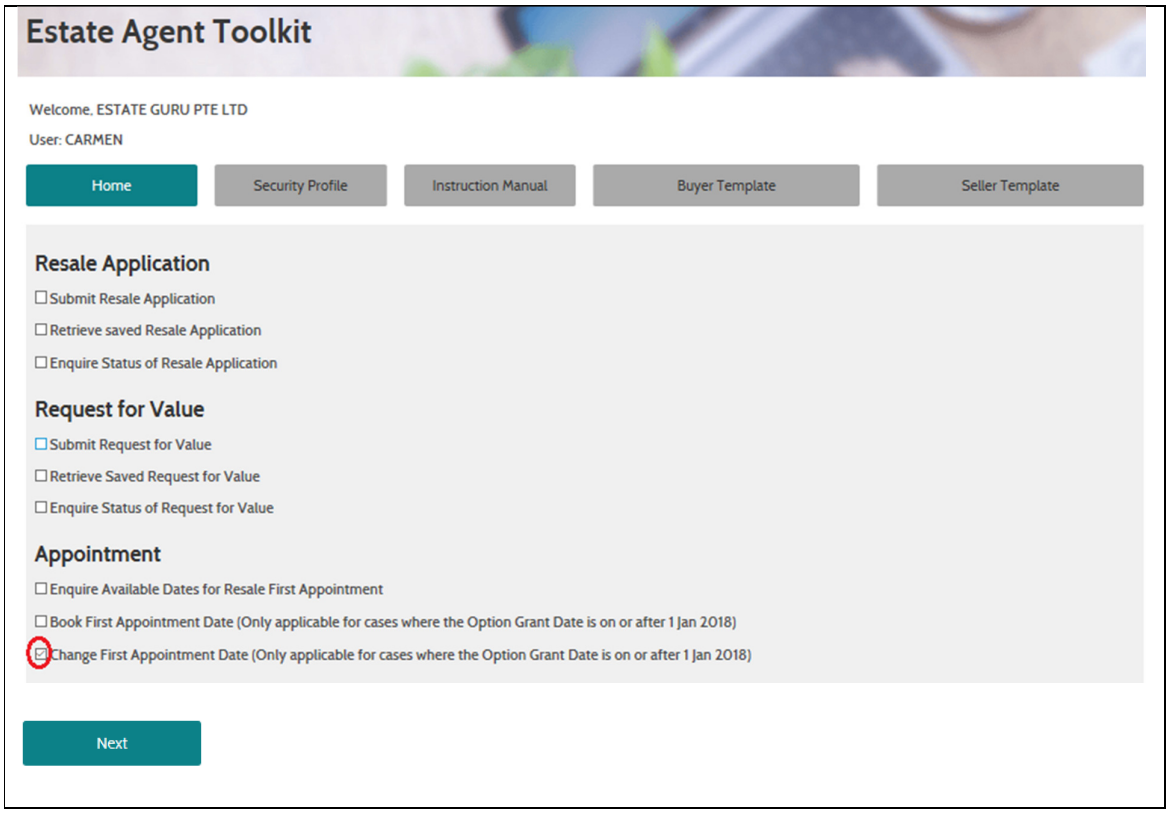
(viii) Once the booking of First Appointment is successful, the following acknowledgement page will be displayed.

You may click **Print** to print a copy of this acknowledgement page or you may click **Home** to return to the Home page.

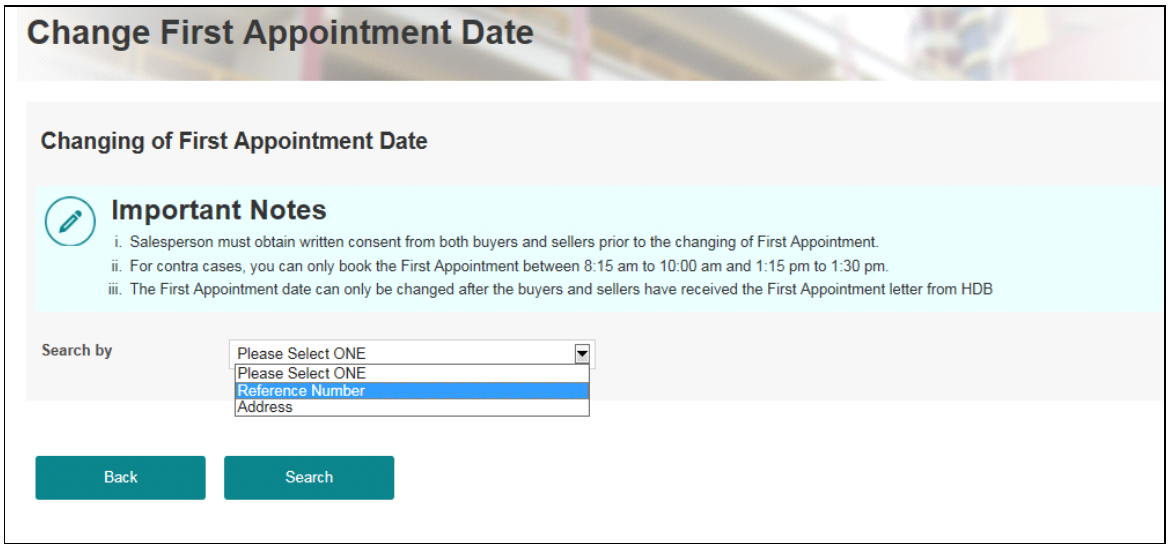


5.3 Changing of First Appointment

(a) Select the checkbox “Change First Appointment Date” and click **Next**.



(b) You may retrieve the case by specifying the Reference Number or Address of the resale flat.



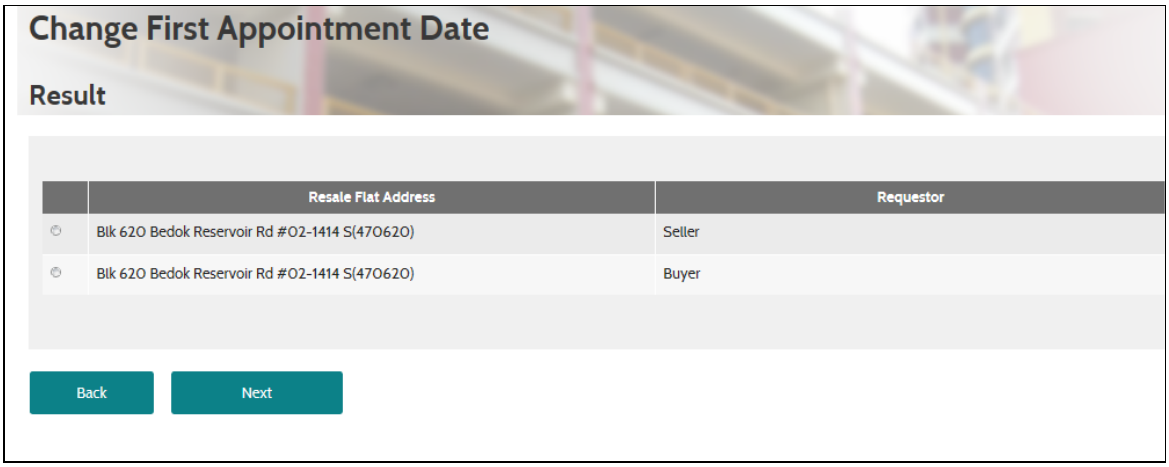
Reference Number

To search by reference number, please enter the reference number of the resale case.

Address

To search by address, please enter the address of the resale case.

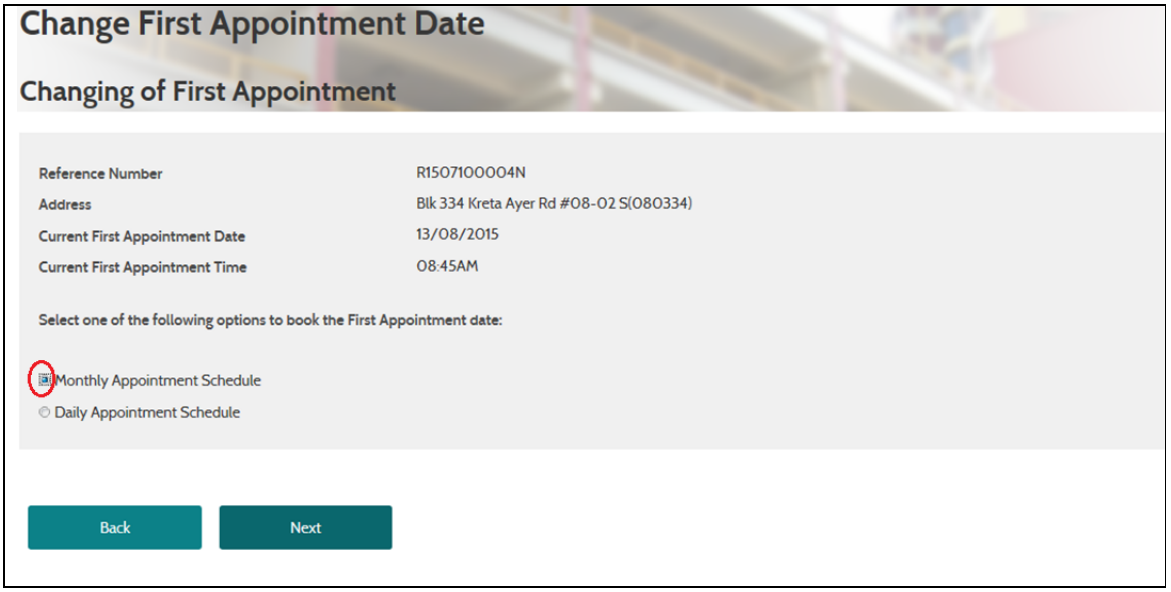
(c) Select the desired flat address and click **Next**.

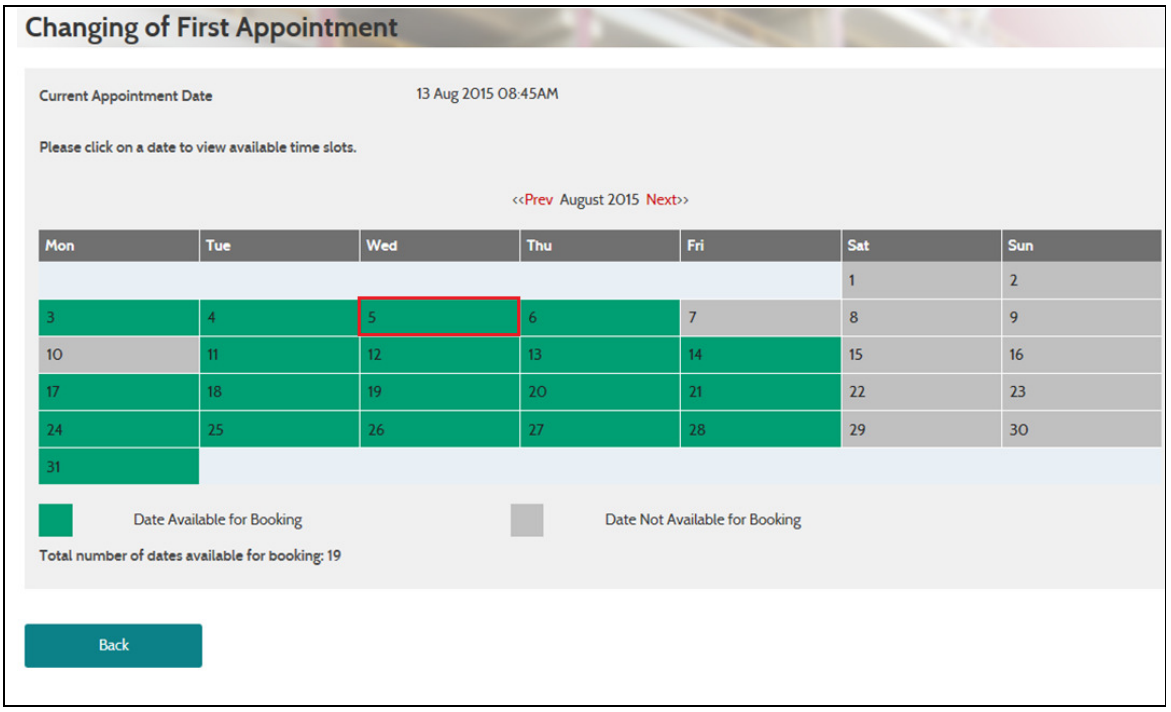


(d) You may change the First Appointment date via the Monthly Appointment Schedule or Daily Appointment Schedule.

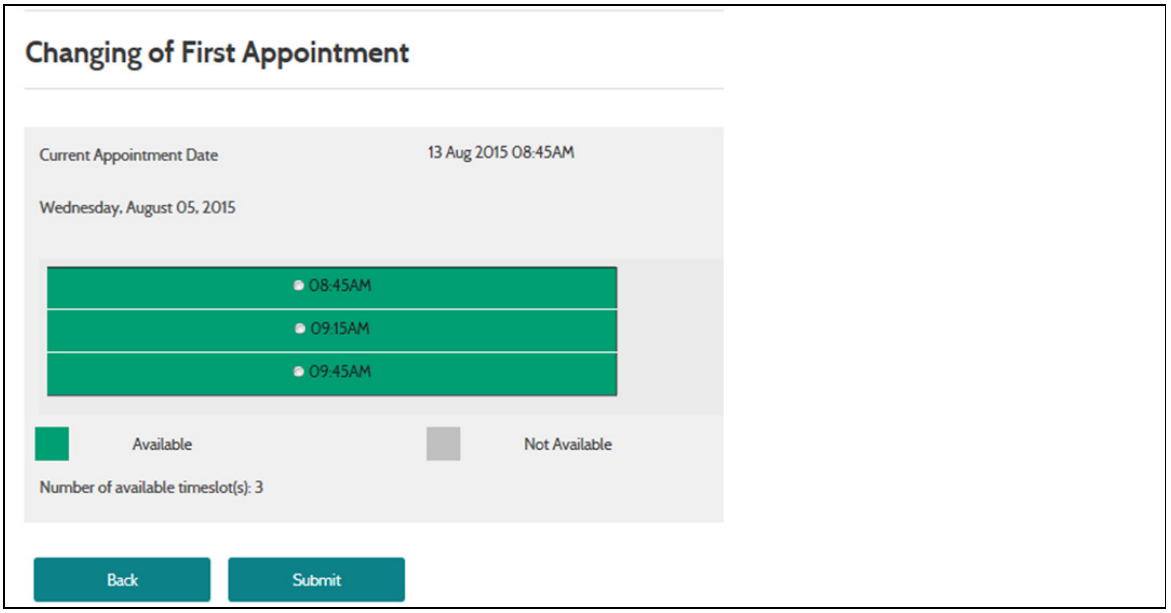
Changing of First Appointment date via the Monthly Appointment Schedule

(i) When you select this option, you may view the available First Appointment dates in the monthly format before zooming in to a preferred date to change the first appointment time.

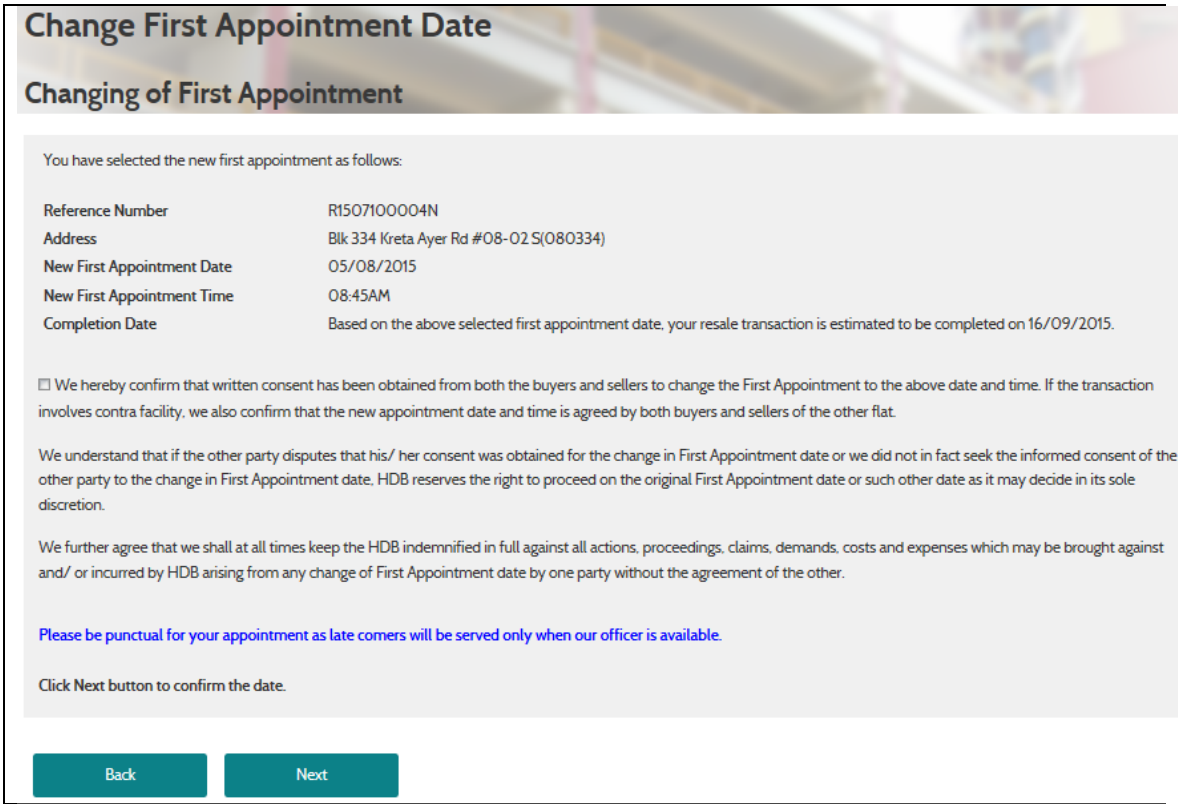




(ii) Select your preferred appointment time and click **Submit**.

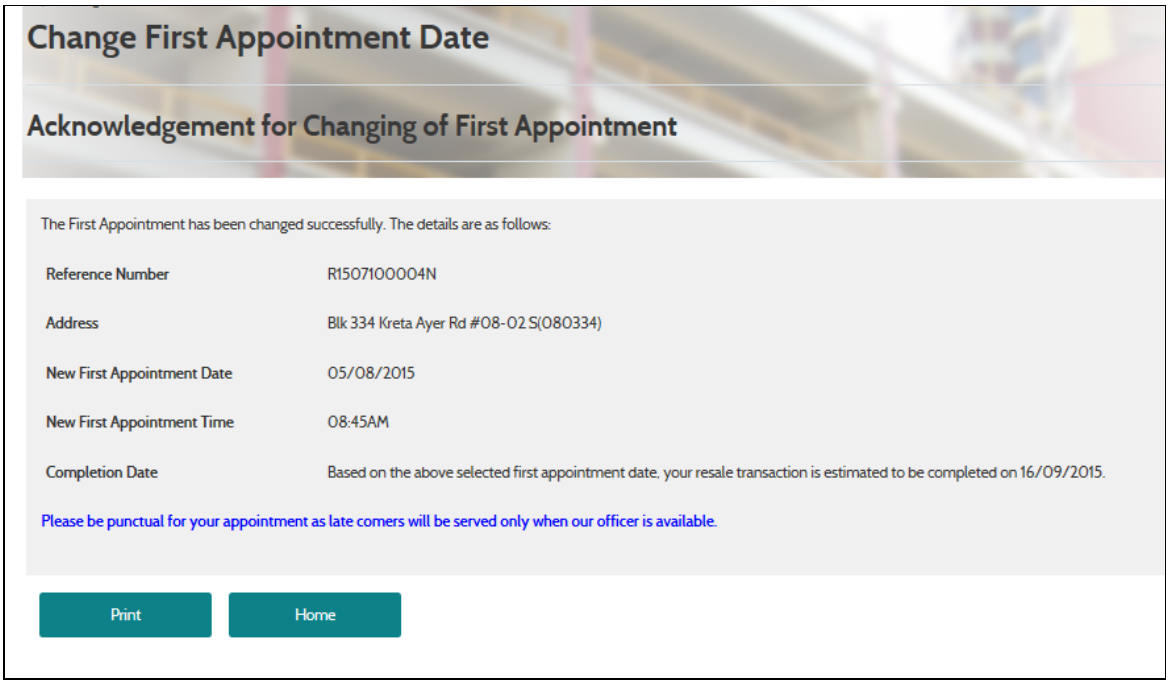


(iii) Confirmation by user that the new First Appointment date/ time is agreed upon by both buyers and sellers and click **Next**.



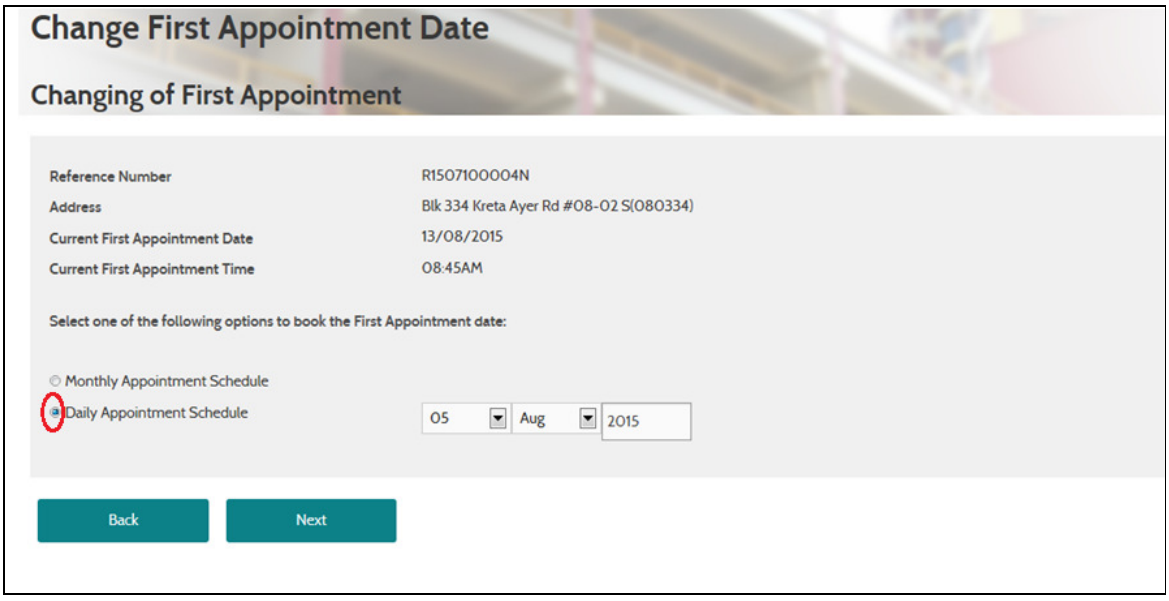
(iv) Once the changing of First Appointment is successful, the following acknowledgement page will be displayed.

You may click **Print** to print a copy of this acknowledgement page or you may click **Home** to return to the Home page.

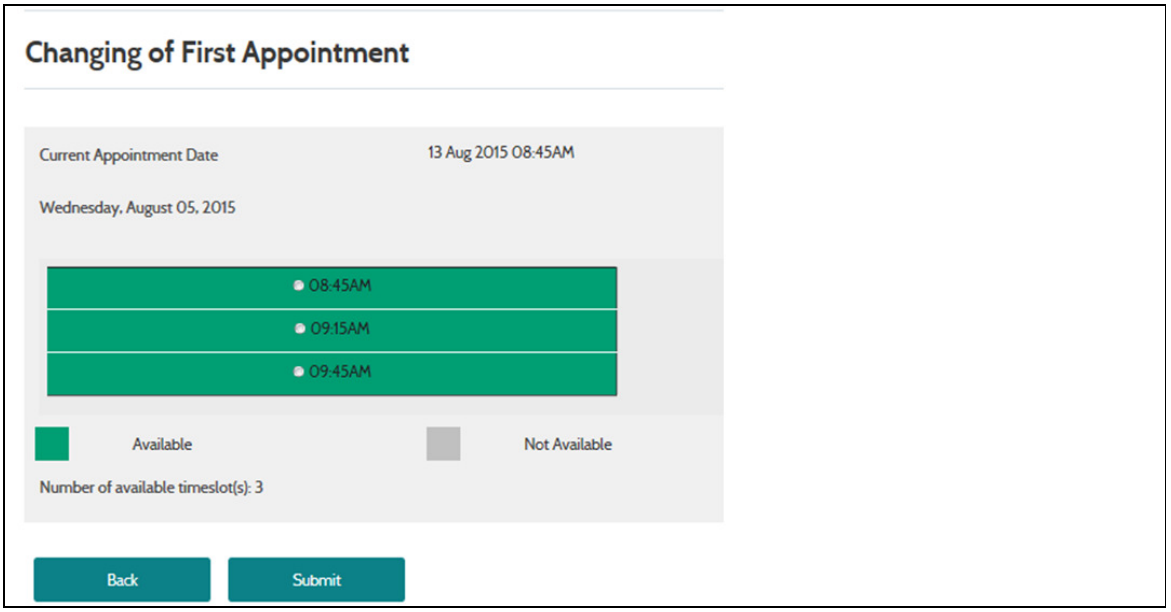


Changing of First Appointment via the Daily Appointment Schedule

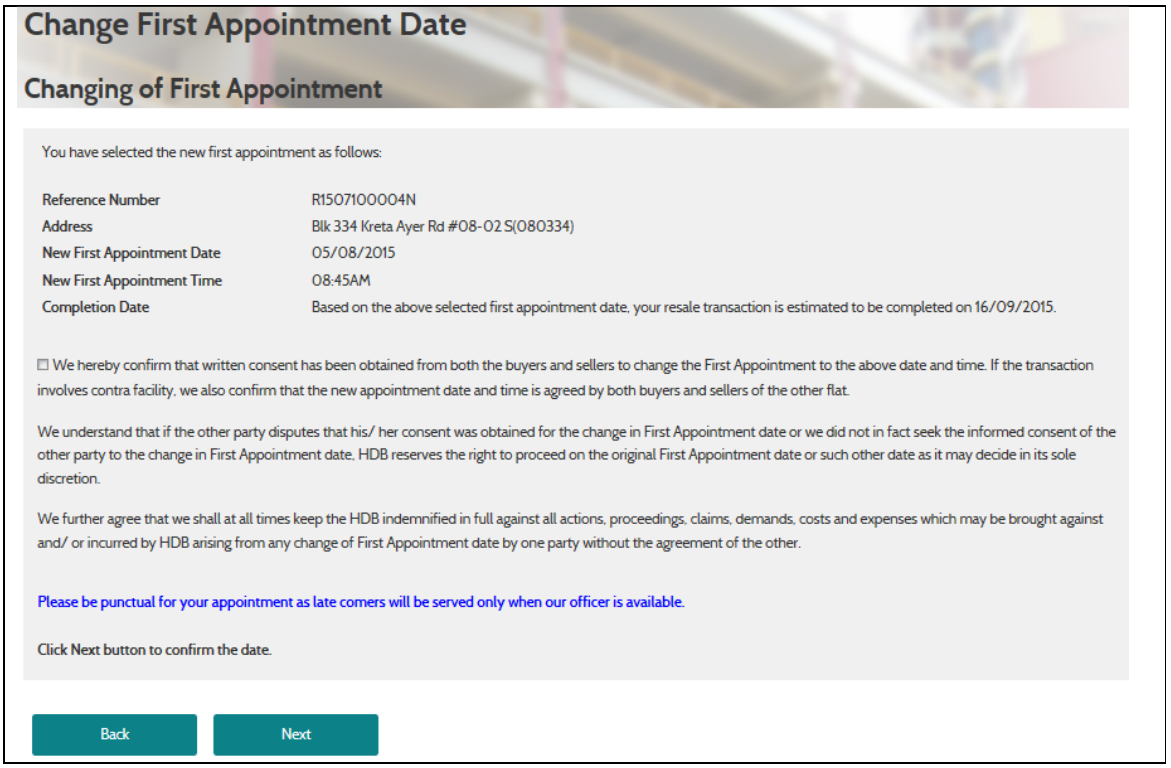
(v) Select this option if you have a preferred date in mind. Key in the date in the format as shown below and click **Next**.

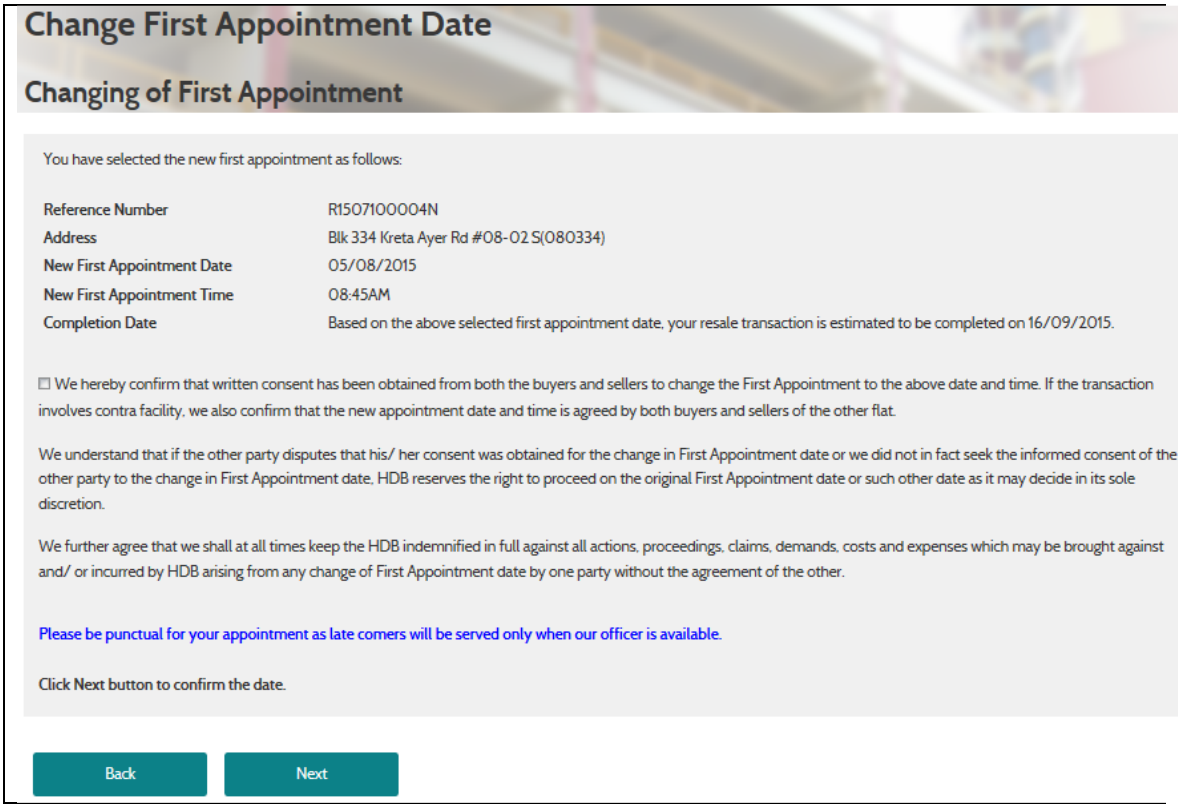


(vi) Select your preferred appointment time and click **Submit**.



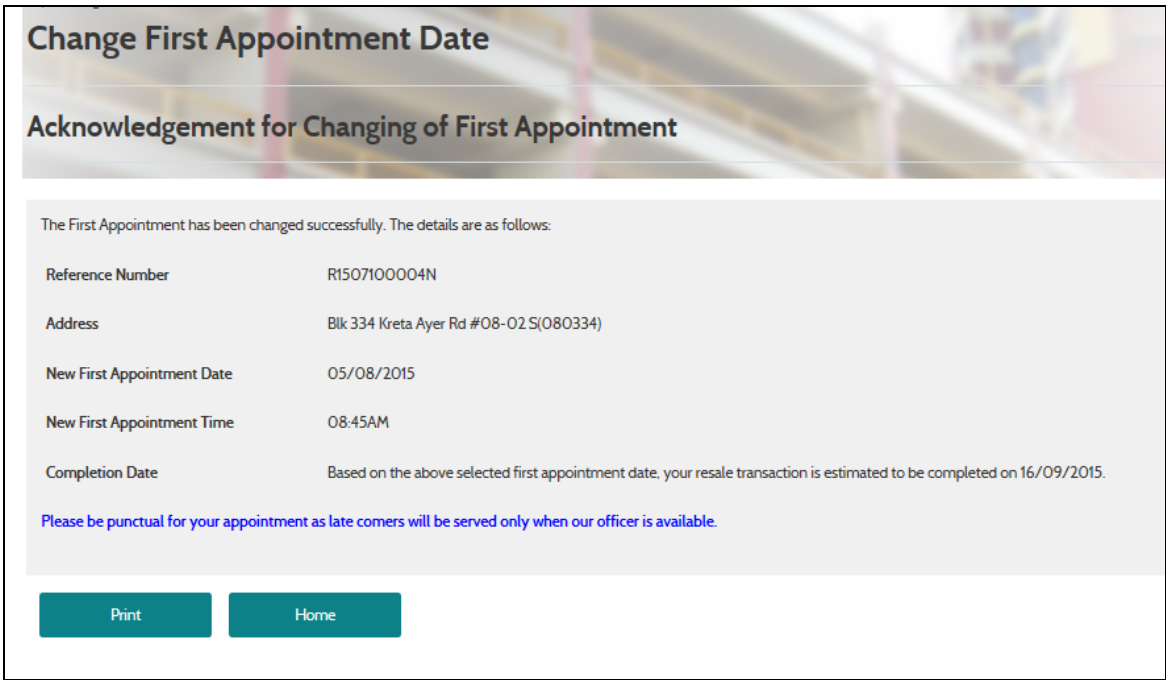
(vii) Confirmation by user that the First Appointment date/ time is agreed upon by both buyers and sellers and click **Next**.





(viii) Once the changing of First Appointment is successful, the following acknowledgement page will be displayed.

You may click **Print** to print a copy of this acknowledgement page or you may click **Home** to return to the Home page.



Chapter 6: Report

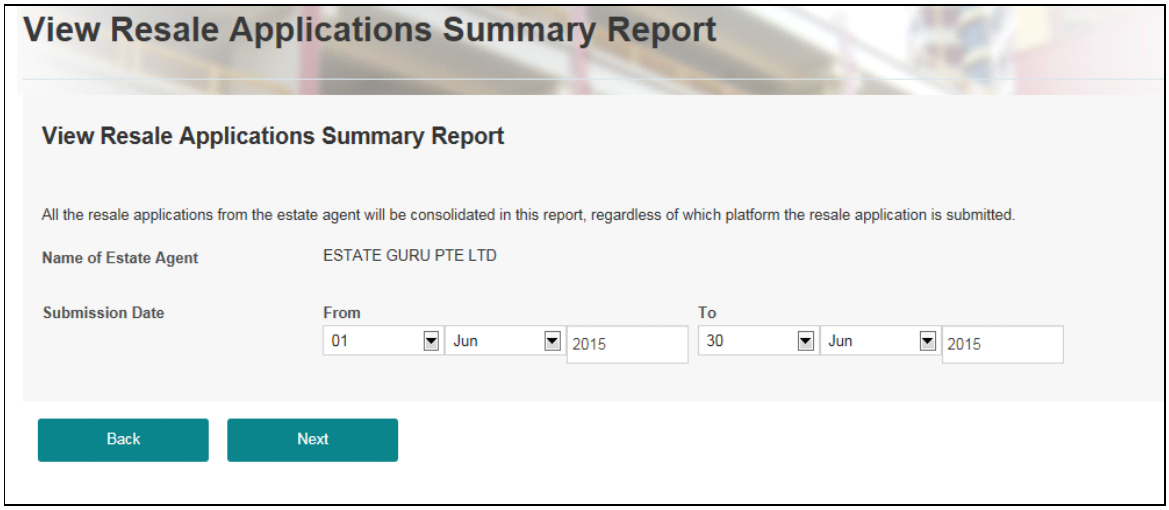
6.1 Viewing of Resale Applications Summary Report

Salespersons from estate agents that sign up for the Estate Agent Toolkit will have the flexibility to submit resale applications via e-Resale (on their own) or via the Estate Agent Toolkit (through their estate agent's data-entry personnel). Regardless of which platform the resale applications were submitted, all the resale transactions from the estate agent will be consolidated in this report. This segment describes the procedure to retrieve the report.

(a) Select the checkbox "View Resale Applications Summary Report" and click **Next**.



(b) Enter the desired range of submission dates for enquiry and click **Next**.

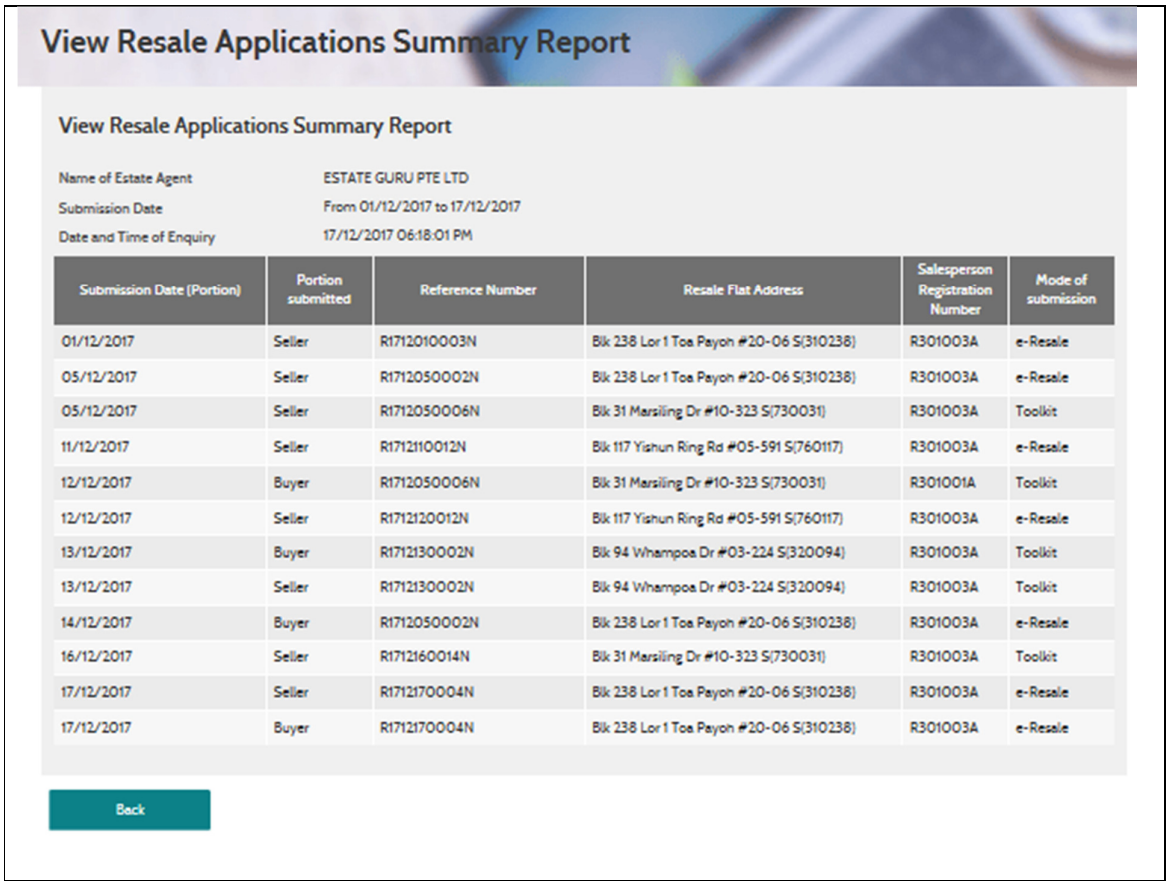


Submission Date From

The system will not accept a date that is greater than the current date.

Submission Date To

The system will not accept a date that is greater than the current date.



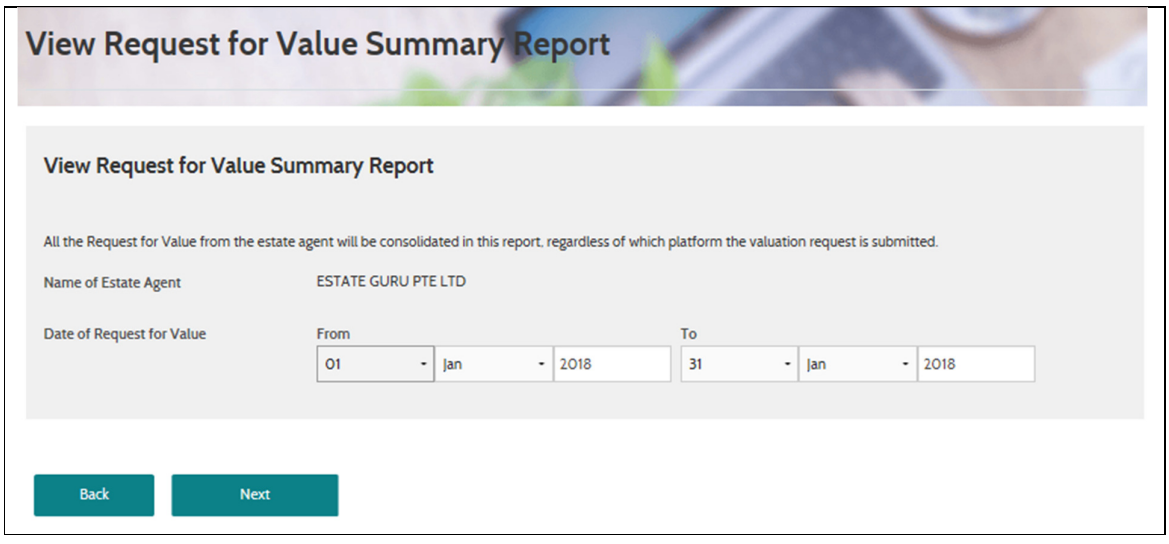
6.2 Viewing of Request for Value Summary Report

Salespersons from estate agents that sign up for the Estate Agent Toolkit will have the flexibility to submit Request for Value via e-Resale (on their own) or via the Estate Agent Toolkit (through their estate agent's data-entry personnel). Regardless of which platform the requests were submitted, all the Request for Value from the estate agent will be consolidated in this report. This segment describes the procedure to retrieve the report.

(a) Select the checkbox "View Request for Value Summary Report" and click **Next**.



(b) Enter the desired range of Request for Value dates for enquiry and click **Next**.

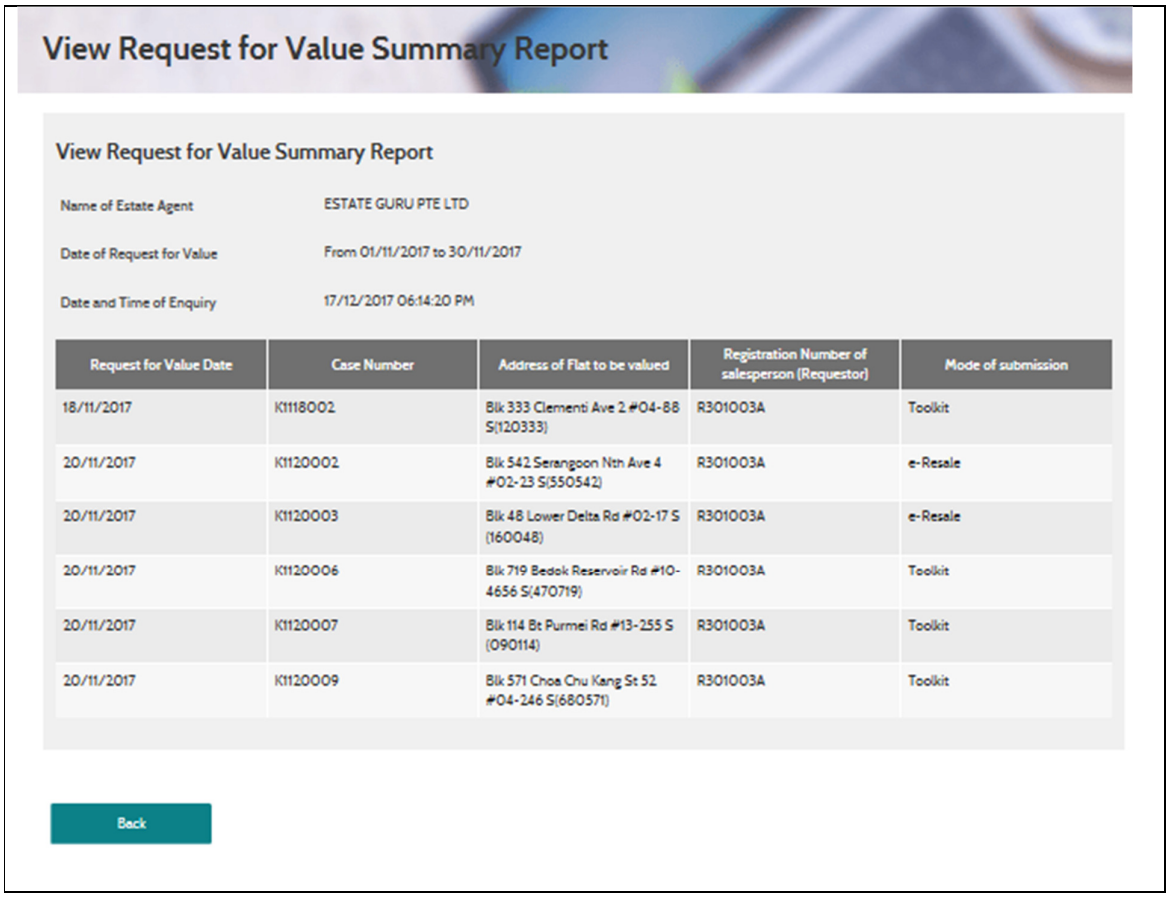


Request for Value Date From

The system will not accept a date that is greater than the current date.

Request for Value Date To

The system will not accept a date that is greater than the current date.



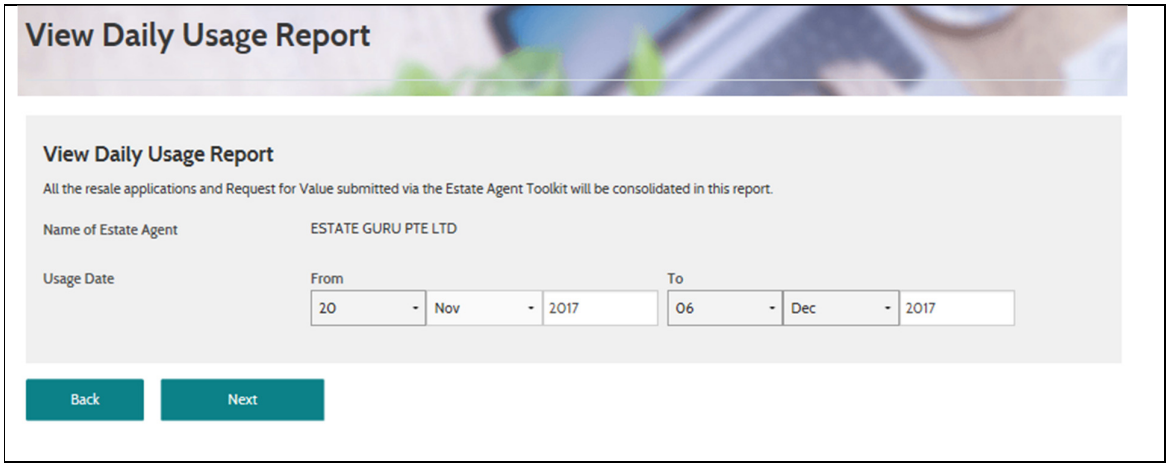
6.3 Viewing of Daily Usage Report

Fees for resale applications and Request for Value submitted via the Estate Agent Toolkit will be deducted from the estate agent's GIRO account. This segment describes the procedure to check the daily usage report in the Estate Agent Toolkit.

(a) Select the checkbox "View Daily Usage Report" and click **Next**.



(b) Enter the desired range of usage dates for enquiry and click **Next**.

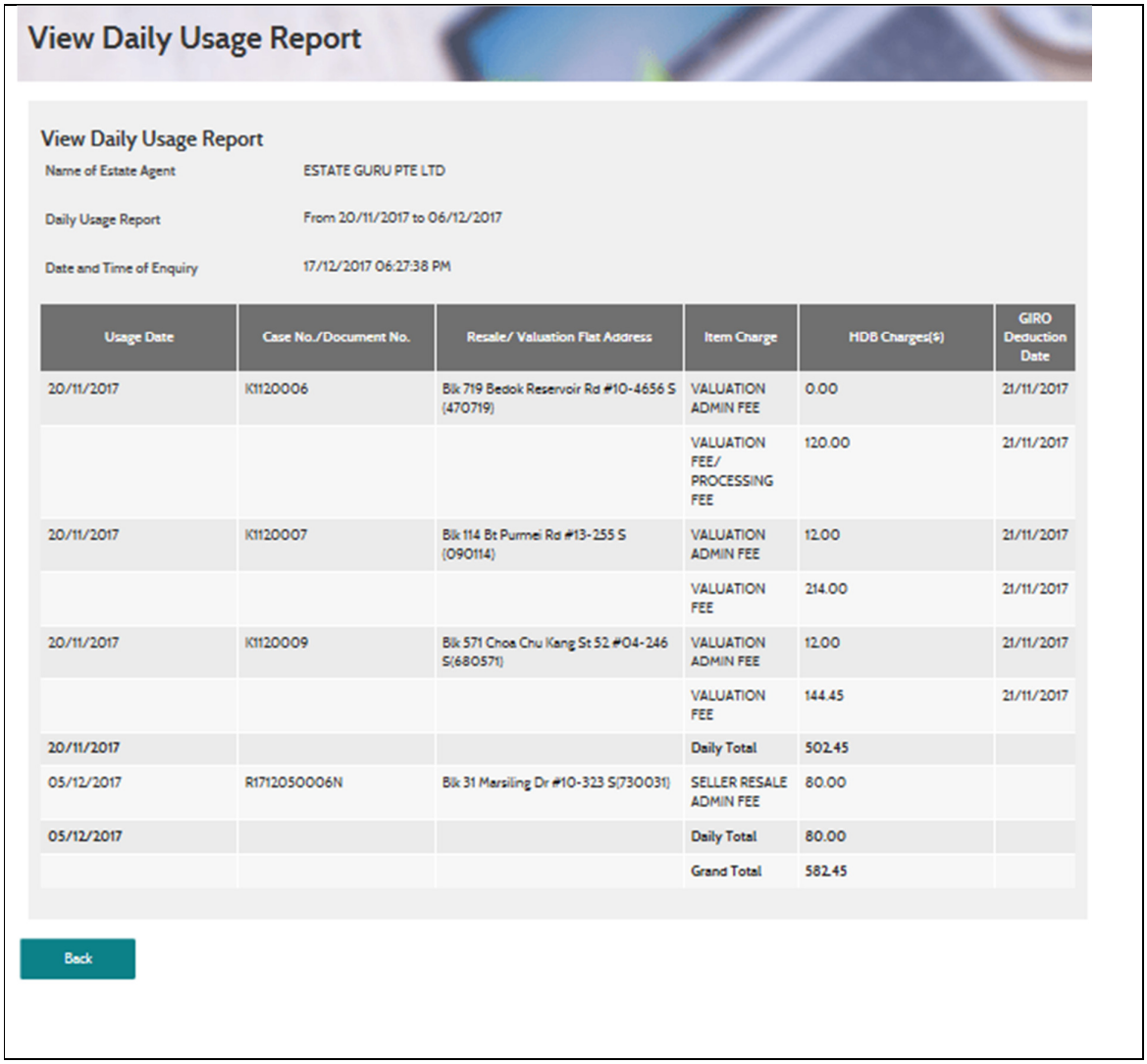


<u>Usage Date From</u>

The system will not accept a date that is greater than the current date.

<u>Usage Date To</u>

The system will not accept a date that is greater than the current date.



View Daily Usage Report

View Daily Usage Report

Name of Estate Agent: ESTATE GURU PTE LTD

Daily Usage Report: From 20/11/2017 to 06/12/2017

Date and Time of Enquiry: 17/12/2017 06:27:38 PM

Usage Date	Case No./Document No.	Resale/ Valuation Flat Address	Item Charge	HDB Charges($)	GIRO Deduction Date
20/11/2017	K1120006	Blk 719 Bedok Reservoir Rd #10-4656 S (470719)	VALUATION ADMIN FEE	0.00	21/11/2017
			VALUATION FEE/ PROCESSING FEE	120.00	21/11/2017
20/11/2017	K1120007	Blk 114 Bt Purmei Rd #13-255 S (090114)	VALUATION ADMIN FEE	12.00	21/11/2017
			VALUATION FEE	214.00	21/11/2017
20/11/2017	K1120009	Blk 571 Choa Chu Kang St 52 #04-246 S(680571)	VALUATION ADMIN FEE	12.00	21/11/2017
			VALUATION FEE	144.45	21/11/2017
20/11/2017			**Daily Total**	**502.45**	
05/12/2017	R1712050006N	Blk 31 Marsiling Dr #10-323 S(730031)	SELLER RESALE ADMIN FEE	80.00	
05/12/2017			**Daily Total**	**80.00**	
			Grand Total	**582.45**	

Back

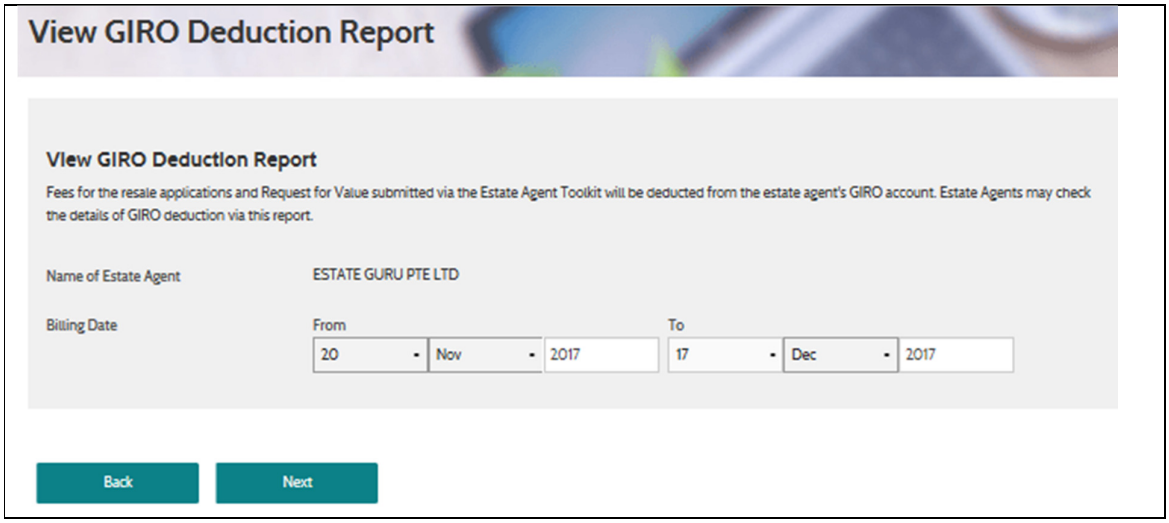
6.4 Viewing of GIRO Deduction Report

Fees for resale applications and Request for Value submitted via the Estate Agent Toolkit will be deducted from the estate agent's GIRO account. This segment describes the procedure to check the GIRO deduction report in the Estate Agent Toolkit.

(a) Select the checkbox "View GIRO Deduction Report" and click **Next**.



(b) Enter the desired range of billing dates for enquiry and click **Next**.



Billing Date From

The system will not accept a date that is greater than the current date.

Billing Date To

The system will not accept a date that is greater than the current date.



View GIRO Deduction Report

View GIRO Deduction Report

Name of Estate Agent: ESTATE GURU PTE LTD

GIRO Deduction Report: From 20/11/2017 to 17/12/2017

Date and Time of Enquiry: 17/12/2017 11:47:04 PM

GIRO Deduction Date	Case No./Document No.	Resale/ Valuation Flat Address	Item Charge	HDB Charges($)	Usage Date	Deducted
21/11/2017	K1120006	Blk 719 Bedok Reservoir Rd #10-4656 S(470719)	VALUATION ADMIN FEE	0.00	20/11/2017	Giro
			VALUATION FEE/ PROCESSING FEE	120.00	20/11/2017	Giro
21/11/2017	K1120007	Blk 114 Bt Purmei Rd #13-255 S (090114)	VALUATION ADMIN FEE	12.00	20/11/2017	Giro
			VALUATION FEE	214.00	20/11/2017	Giro
21/11/2017	K1120009	Blk 571 Choa Chu Kang St 52 #04-246 S(680571)	VALUATION ADMIN FEE	12.00	20/11/2017	Giro
			VALUATION FEE	144.45	20/11/2017	Giro
21/11/2017			Daily Total	502.45		
			Grand Total	502.45		

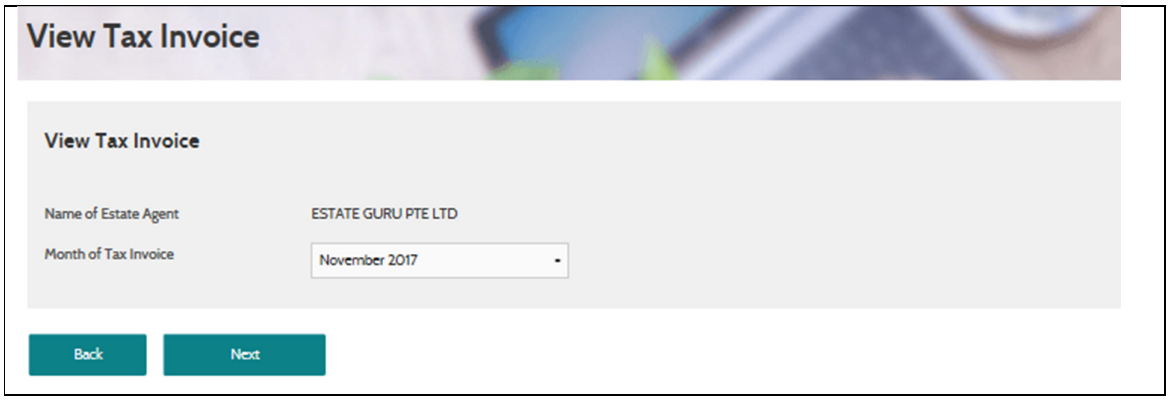
6.5 Viewing of Tax Invoice

Fees for resale applications and Request for Value submitted via the Estate Agent Toolkit will be deducted from the estate agent's GIRO account. This segment describes the procedure to download the Tax Invoice issued by HDB.

(a) Select the checkbox "View Tax Invoice" and click **Next**.



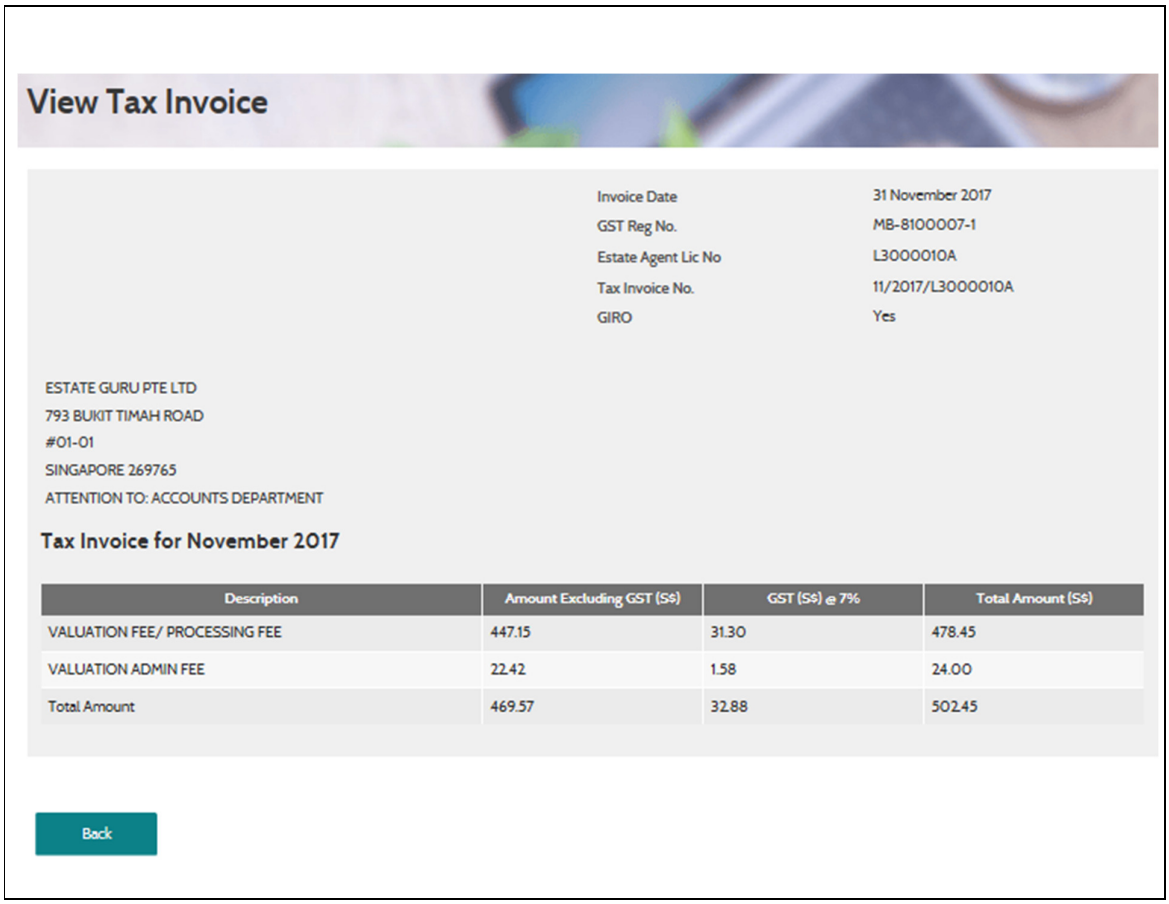
(b) Select the Month of Tax Invoice and click **Next**.





The Tax Invoice of the previous month will generally be availed around the 7th day of the following month. Example: The Tax Invoice for February 2018 is available around 7 March 2018; provided the 7th day is not a public holiday.

(c) All payments collected successfully via the GIRO mode will be displayed here.

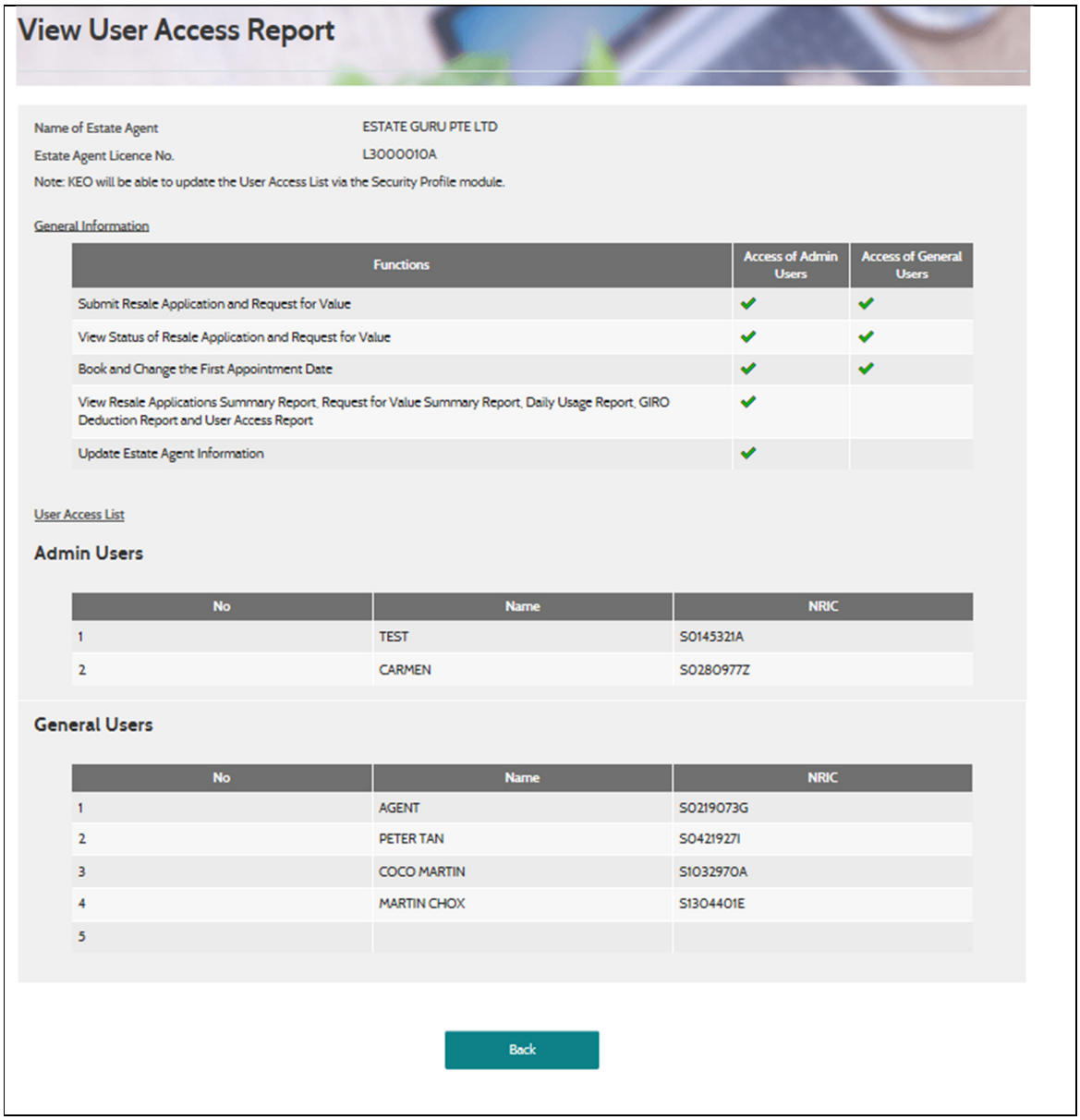


6.6 Viewing of User Access Report

(a) Select the checkbox “View User Access Report” and click **Next**.



(b) The list of Admin Users and General Users will be displayed.



View User Access Report

Name of Estate Agent: ESTATE GURU PTE LTD

Estate Agent Licence No.: L3000010A

Note: KEO will be able to update the User Access List via the Security Profile module.

General Information

Functions	Access of Admin Users	Access of General Users
Submit Resale Application and Request for Value	✔	✔
View Status of Resale Application and Request for Value	✔	✔
Book and Change the First Appointment Date	✔	✔
View Resale Applications Summary Report, Request for Value Summary Report, Daily Usage Report, GIRO Deduction Report and User Access Report	✔	
Update Estate Agent Information	✔	

User Access List

Admin Users

No	Name	NRIC
1	TEST	S0145321A
2	CARMEN	S0280977Z

General Users

No	Name	NRIC
1	AGENT	S0219073G
2	PETER TAN	S0421927I
3	COCO MARTIN	S1032970A
4	MARTIN CHOX	S1304401E
5		

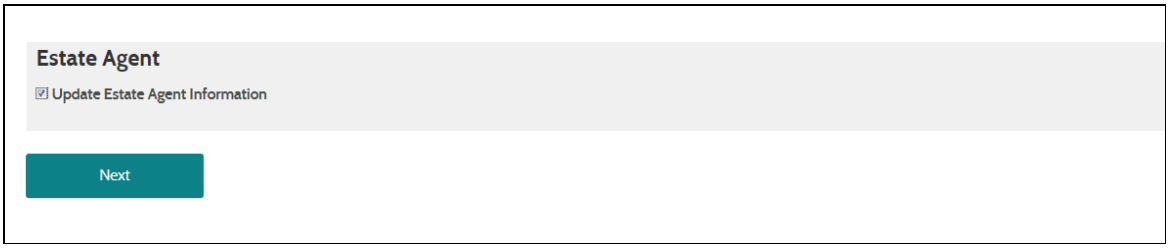
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Chapter 7: Estate Agent

7.1 Updating of Estate Agent Information

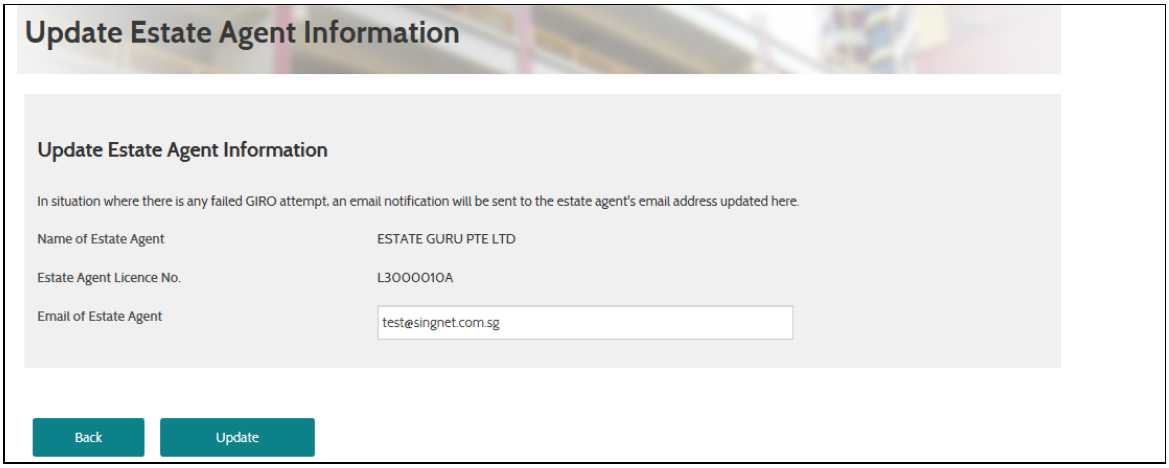
The KEO and Admin Users will be able to update the email address of the estate agent.

(a) Select the checkbox “Update Estate Agent Information” and click **Next**.



(b) Enter the email address of the estate agent

(c) Click **Update**.



The estate agents must ensure that there are sufficient funds in their bank account before the GIRO deduction date.

In situation where there is any failed GIRO attempt, the estate agent shall make payment to HDB within three working days from HDB’s written request or verbal notification to do so.

The IBG deduction date is on a daily basis. If the first deduction is unsuccessful (due to insufficient funds in the bank account), an email notification will be sent to the estate agent’s registered last known email address (as updated by the estate agent in the Estate Agent Toolkit) informing of the failed deduction and to top up the bank account within 10 days from HDB’s email notification.

If there is failure in the second attempt at deduction, access to the Estate Agent Toolkit will be suspended.