FAQs

At Post Office for Intermediaries, we're here to help. With our experience of the intermediary market you can be sure that your cases are in safe hands.

Here are some commonly asked questions and answers to help you make sure your time with us is well spent.

Why choose Post Office for Intermediaries?

With our experience of the intermediary market, great systems and service, you can be sure your time is well spent with us.

Our award winning application system has been designed with you in mind. You can log in and:

- Upload documents in minutes
- Get 24/7 case updates
- Message your underwriter directly; and
- Download online offers and valuations.

How do I register?

You can register and login to our online application system via our website po4i.com. You just need to have your company's FCA number to hand.

How can I link myself to my broker's cases?

You just need to ask your broker to assign their cases to you, so you can manage them and receive updates.

Why is it helpful to link myself to my broker?

You can manage your broker's cases and receive updates from us using your own login details. This is useful if your broker is on holiday or off ill, you can continue to monitor your cases.

Where can I find the policy rules on declines and referrals?

The reasons why cases are declined or referred can been seen in the 'Overview tab' when you login to our online application system.

Can I download offers and valuations?

Yes. You can download offers and valuations in a PDF format. This can be done from the 'Distributed documents' or 'Records tab' in our application system.

Where can I find forms to download?

You can find useful forms and guides from the library on po4i.com

How can I respond to a request for information?

You can easily view and respond through the 'Actions tab'.

Where can I view the documents needed for assessment?

You can see which documents we need for assessment in the 'Actions tab'. You can also see exactly what documents we've received and requested from third parties, including valuations.

How do I use case messaging?

Case messaging allows 2-way communication straight to your underwriter. Please see our short video to see how this works.

Can customers reduce the length of their term and switch products at the same time?

Yes, we've improved our product switching service so you can easily transfer products, or reduce the term for existing customers online in minutes.

How do I process a term reduction and product switch?

See our process flow for step by step instructions.

How do I reset my password?

Login and choose 'forgotten password', you'll receive an automated email to reset your password.
Or call us on 0345 266 8928*.

How do I escalate a case?

Contact your Business Development Manager and they'll take care of this for you. Find your local Business Development Manager here.

What happens if I receive an error message when uploading bank statements and payslips?

If this happens, you need to print the bank statements and payslips, scan them and then upload. You can download other useful forms and guides you need to submit business from the literature page on our website po4i.com.

How do I upload documents?

When your broker has submitted a full application, visit the 'Actions tab' to view and upload the documents we need for assessment.

What is Auto Packaging and how can this help me?

The Auto Packing feature in our online application system has been designed to help make submitting documents easier. It tells you what documents we need to see and when to submit them. Please see our short video to see how this works.

Who can help me?

We have 24 Business Development Managers across the UK, available both via the telephone and face to face.
Find your local Business Development Manager here.
If you need any technical support call 0345 266 8928* **and choose option 4**.

Need help?

Contact our intermediary support team from 8.30am to 6pm, Monday to Friday on 0345 266 8928*.

*Lines are open Monday to Friday 8.30am to 6pm. Calls are recorded for training and monitoring purposes. Calls cost no more than calls to geographic numbers (01 or 02). Calls from landlines and mobiles are included in free call packages.

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