

How to get started and work with us

We're here to help you. With our experience of the intermediary market, you can be sure your cases will be in safe hands. Your time will be well spent with our great service and systems too.

How to get started

Our online application system has won several awards for its innovation and ease of use. Here's how to get started.

- [Register](#) and login to our online application system via our website **po4i.com**
- Ask your broker to assign their cases to you, so you can manage them and receive updates.

Use these 'tabs' to manage your cases.

Actions tab	Distributed documents/records tab	Overview tab
<ul style="list-style-type: none">> See which documents we need for assessment> Download the Gift Wealth, Gift Deposit and Sanction forms> Packaging a case: see your packaging list and upload documents> Easily respond to any questions	<ul style="list-style-type: none">> Download offers and valuations	<ul style="list-style-type: none">> View the policy rules and see the reason why cases have been declined or referred

Top tips for getting started

- **Password reset:** Login and choose 'forgotten password', you'll receive an automated email to reset your password. **Or call us on 0345 266 8928***
- **Case escalation:** Contact your Business Development Manager and they'll take care of this for you
- **Error message:** You may get an error message when uploading bank statements and payslips. If this happens, print them, scan and then upload.

Application hints – help us to help you

Incorrect information and over packaging a case can hold it up. These tips can help:

- **Applicant residential address:** capture and key the history correctly
- **Applicant names:** ensure spellings are correct; if not the case could be rescored
- **National Insurance numbers:** ensure correct and valid
- **Payslips:** check for deductions which suggest an undeclared outgoing
- **Sole applicants:** clarify when customers are married but application is sole
- **Bank statements:** check for undeclared credit items
- **Previous declines:** supply full details
- **Non commutable distances:** query with the customer upfront to avoid delays
- **Uploaded documents:** only supply what we ask for once.

Need help?

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

It's time well spent.



in conjunction with
Bank of Ireland  **UK**
for Intermediaries

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*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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