

Application hints and tips

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**
- You can assign cases to colleagues so they 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> 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.

It's time well spent.



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Completing the application

Our award winning application system has been designed with you in mind. We know how precious time is to you and your clients, so we work hard to offer quick and efficient underwriting. Providing incorrect information and over packaging a case can hold it up, so here are some tips to help you make the application process as smooth as possible.

Creating AIPs and applications is simple

Our online forms make it easy for you to enter and edit customer information. What's more, you can create an AIP with a soft footprint and when your customer is ready, this can be converted to a full application with a hard footprint in a single click.

Case tracking lets you know how your customers' cases are progressing. When a case is updated we'll send you an email to let you know. **Follow these simple tips to make sure your case is processed as smoothly as possible.**

- **Applicant date of birth:**
Please capture and key this information correctly.
- **Applicant residential address:**
Please capture and key the address history correctly. Please input the address where the applicant officially lives. This may not be where their post has been delivered, e.g. a university address as opposed to a home address.
- **Applicant names:**
Please ensure spellings are correct. If not the case could be rescored.
- **National Insurance numbers:**
Please ensure this is correct and valid.
- **Employment:**
Please ensure the employment selection is completed correctly, particularly in relation to self employed and employed statuses as well as the classification of the applicant's occupation.
- **Payslips:**
Please check for deductions which suggest an undeclared outgoing.
- **Sole applicants:**
Please clarify when applicants are married but application is sole.
- **Bank statements:**
Please check for undeclared credit items.
- **Previous declines:**
Please supply full details.
- **Non commutable distances:**
Please query with the customer upfront to avoid delays.
- **Additional information:**
Please use the additional information box to include anything that is relevant to the application, e.g. supplementary case notes to support the application.
- **Uploaded documents:**
When you've submitted a full application, we'll tell you which documents we need for the underwriter assessment. You can upload them to the system quickly and securely. You can also use our online application system to view and pay any fees online.

Uploading documents

Here are some tips to help you with uploading documents.

Using document upload

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

Follow these simple tips to make sure your case is processed as smoothly as possible.

- Only upload documents we've asked for.
- Upload documents under the correct folder heading. Wrongly labelled documents will be rejected, and delay your customer's application.
- Scan the full document. Make sure nothing gets cut off and the text is clearly visible. Re-scans won't be accepted.
- Certify all documents online.
- If you need to send anything to us by post, use our handy cover sheet. You can find this in 'Case Overview' in our online application system.

We accept the following:

- PDF or JPEG file types
- High quality images taken by a mobile device
- A maximum file size of 10MB
- Colour or black and white documents
- Up to 50 separate uploads per application (with up to 100 pages per upload).

TOP TIP

To save time you can assign your case to administrator(s) to manage them for you. They can upload documents, progress your cases and log in for updates. Just call us so we can verify their access.

Keeping you updated

- Your case will be sent to an underwriter once we've received all the requested documents and the valuation report. So the quicker we get the information, the quicker we can produce your offer.
- Use the 'Actions tab' to see exactly what documents we've received. You can also see what documents we've requested from third parties, including valuations.
- The service update page on our website lets you know our current processing times.

Need help?

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

It's time well spent.



Money

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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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