

Linking your cases to your case administrator(s)

Save time. Let your case administrators help you manage your cases.

Did you know, your case administrator can help you support your clients? Simply give them access to your cases in our online system.

Whilst you're taking a well-deserved break or perhaps particularly busy, your case administrators can ensure your clients cases are progressed. They can help with tasks such as uploading documents and logging in for updates on your behalf.

How to add your case administrators to your profile

First of all you'll need to make sure your case administrator(s) have registered with Bank of Ireland for Intermediaries, then you'll be able to add them. If they've registered and you can't see them, **get in touch**. They'll need to verify them and add them to your profile.

How to add your case administrator(s) to your profile:

- ▶ **Contact us** to add '**allow case admin functionality**' to your profile
- ▶ **Login** to your Bank of Ireland for Intermediaries profile
- ▶ Scroll down the page to the '**Case Permissions**' section and click on the **V**
- ▶ Click '**Add Case Administrator**' - this should open a list of registered administrators that you can add to your profile
- ▶ Add the case administrator(s) that you wish to have access and confirm the level of access rights you wish to give. The options are '**full**' or '**post submission**'
- ▶ Save your changes.

Once they're linked we'll also be able to discuss your clients' cases directly with them.

For more information, head over to boi4i.com where you can:



Find resources on our [Working with us](#) Hub



Get answers to common queries from our [FAQs page](#)



Get in touch with our team for further support

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