Hints and tips for using our online application system

Bank of Ireland UK

Intermediaries

Check out our useful tips to help make the application process as smooth as possible.

How to get started

It's quick and easy to **register** and **login** to our online application system via our website **boi4i.com**

If you forget your password simply login and choose **'forgotten password'**, you'll receive an automated email to reset your password. You may need to check your spam/junk folder.

You can use the following useful **'tabs'** to manage your cases.

Actions tab	Distributed docs/records tab	Overview tab
► See which documents we need for assessment ► Packaging a case: see your packaging list and upload your documents ► Easily respond to any questions	► Download offers and valuations	► View the policy rules and see the reason why cases have been declined or referred

Linking your cases to your administrator

Your case administrator(s) can help you manage your clients cases. They can upload documents, progress your cases and log in for updates.

Simply give them access to your cases in our online system by adding them to your profile. You'll need to make sure your case administrators have registered with Bank of Ireland for Intermediaries. If they've registered and you can't see them, please **get in touch**. We'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 adminstrator(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.

Completing the application

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

Providing incorrect information and over packaging a case can hold it up, so here's some tips to help you:

► **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 make sure the employment selection is completed correctly. For example, you'll need to include self employed and employed statuses as well as the classification of the applicant's occupation. If your client has more than one job, add both salaries together and enter into the income field. Please provide full employment details and the breakdown of the salaries in the additional information box.

► **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 your client upfront to avoid delays.

► **Additional information:**
Please use the additional information box to include supplementary case notes. For example you'll need to include full details of employer and role for any additional employment.

► **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

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

► Only upload documents we've asked for	**We accept the following:**
► Upload documents under the correct folder heading. Wrongly labelled documents will be rejected, and delay your client's application	► PDF or JPEG file types
	► High quality images taken by a mobile device
► Scan the full document. Make sure nothing gets cut off and the text is clearly visible. Re-scans won't be accepted	► A maximum file size of 10MB
► Certify all documents online	► Colour or black and white documents
► If you need to send anything to us by post, use our handy cover sheet. You can find this in **'Case Overview'**.	► Up to 50 separate uploads per application (with up to 100 pages per upload).

Error message

You may get an error message when uploading bank statements and payslips. If this happens, print them, scan and then upload.

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.

► Case tracking lets you know how your clients' cases are progressing. When a case is updated we'll send you an email notification. Simply **login** to see the update.

► The **service update page** on our website lets you know our current processing times.

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