

HSBC UK Bank plc Redemption Statement Smart Form Requests FAQs

Use of the Smart Form is the mandatory process for requesting a redemption statement from HSBC UK Bank plc and use of the Smart Form will avoid delays by directing the request straight to the processing team.

Frequently asked questions

What if I cannot open the Smart Form?

Check that you have the minimum PDF reader requirement: Adobe Reader 8 is required to open the document.

If you receive an error message when opening the Smart Form, or you have Microsoft Edge and are facing difficulty in opening the form, refer to the instructions below:

- Right click on the Smart Form link
- Save the Smart Form document in your desired folder
- Navigate to the location of the document
- Right click on the document and choose 'open with' and select Adobe Reader.

NOTE: Consider selecting Adobe Acrobat Reader as your default for opening this type of file if you do not want to save a local copy every time you submit a form.

CARE: Adobe Reader must be used to access the form; otherwise, an error message will appear. This requirement applies equally to Mac users. Please note, the instructions in the FAQ document are specific to Windows and Microsoft Edge and are not applicable to users accessing the form via Firefox, Chrome, or other browsers.

Can we amend the body of the email?

No, amending the email may result in a corrupt data transfer.

Will HSBC UK Bank plc accept a redemption statement request by post or fax?

No, HSBC UK are not able to accept a request by post or fax.

Confirmation of receipt and processing:

An auto response will be sent to confirm HSBC have received submission of the Smart Form. To support HSBC in ensuring cases are correctly prioritised please only call HSBC UK Bank plc if the request is urgent.

I have not received my quote yet. Should I submit a new Smart Form?

Please do not submit multiple requests. You will receive a response within the outlined SLA within the auto response email.

A form has been submitted, but there has been no email response:

The smart form is configured so a response will be received by the sender with either a successful receipt or a failure receipt. Please check other folders within your inbox as the response may have dropped into an alternative folder (i.e. junk / spam)

My request is urgent:

It takes around 25 minutes for the transmission of the form to reach the customer file. Please only contact HSBC UK Bank plc if your redemption request relates to a same day completion.

All the fields are correct; however, the validation field is not showing?

Please check the instructions on page 1 of the Smart Form in relation to the formatting of each field for the Smart Form to be successfully validated.

Multiple redemption requests: can more than one Smart Form be submitted on one email?

A Smart Form can contain multiple mortgage accounts for the same customer (s), i.e. if they have three mortgage accounts, these should be submitted on the same Smart form. If you are requesting redemption quotes for an unrelated customer(s), a separate Smart Form will be required for each unrelated customer.

How do I know this process is secure?

This account is specific to HSBC UK Bank plc. When received by HSBC, all details are checked to eliminate any fraudulent attempts.

Can we amend the default email or add to the subject line?

No, this will corrupt the submission and will result in the submission being rejected by HSBC.

What software does the Smart Form require?

Adobe 8 is the minimum software that is required.

Can the Smart Form be saved for recording purposes?

For individual file purposes, yes.

However, the Smart Form should not be saved and edited locally or reused, unless you are having issues using the form.

What happens if the mortgage account number is incorrectly transposed?

If the reference cannot be matched to an active case our team will call you to request a new submission.

How do we contact HSBC UK BANK PLC?

Please read the instructions on page 1 of the Smart Form prior to contacting HSBC. Should your query not be answered, you can telephone us on 0370 6007722.

Can I use the Smart Form for first direct queries?

No. At present this process is only available for HSBC UK Bank plc.