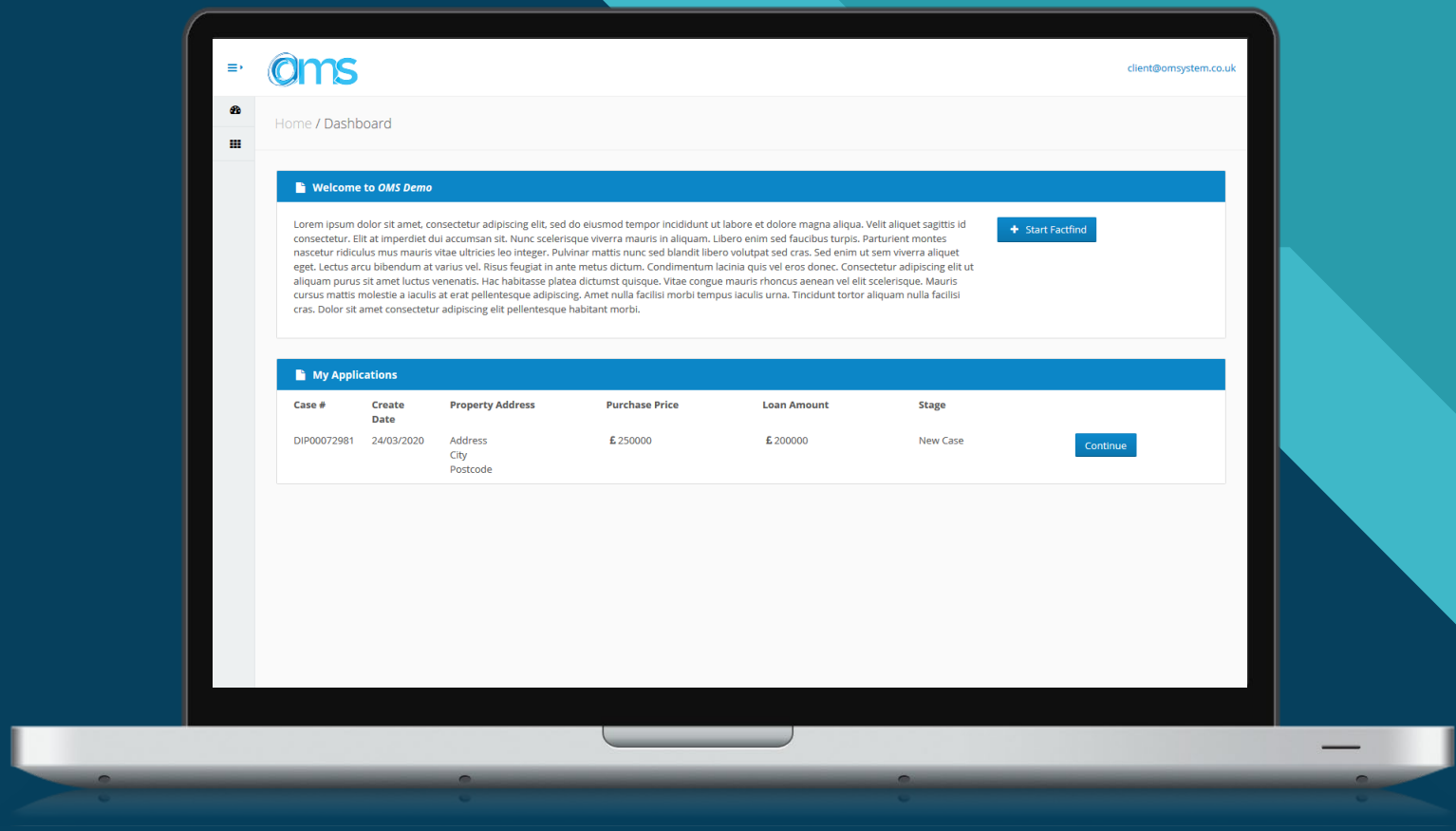
One Mortgage System

How to create and submit a factfind in the OMS client portal

Starting a Factfind

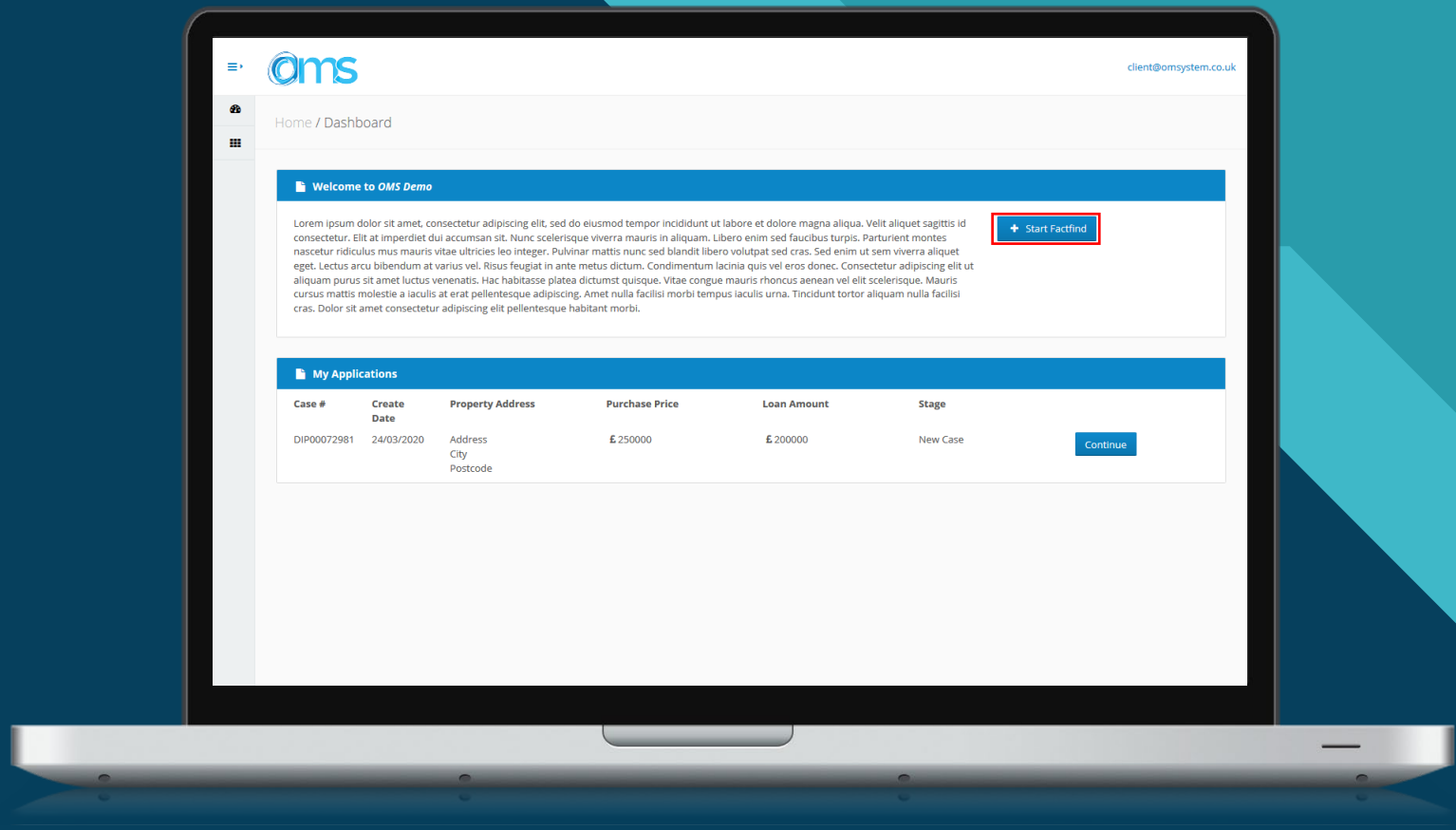
Factfind Invitation

- If your adviser has sent you an email to invite you to complete the factfind, follow the link and enter the username & password provided in the email. If you have had a case with us before on the portal, please use the username & password that was set at that time.
- Once logged in, you will be greeted with the dashboard that will show the full list of your cases on OMS. Click on the ‘Continue’ button on the case that you have been invited to complete.
- This will open the factfind for you to complete and submit to your adviser.



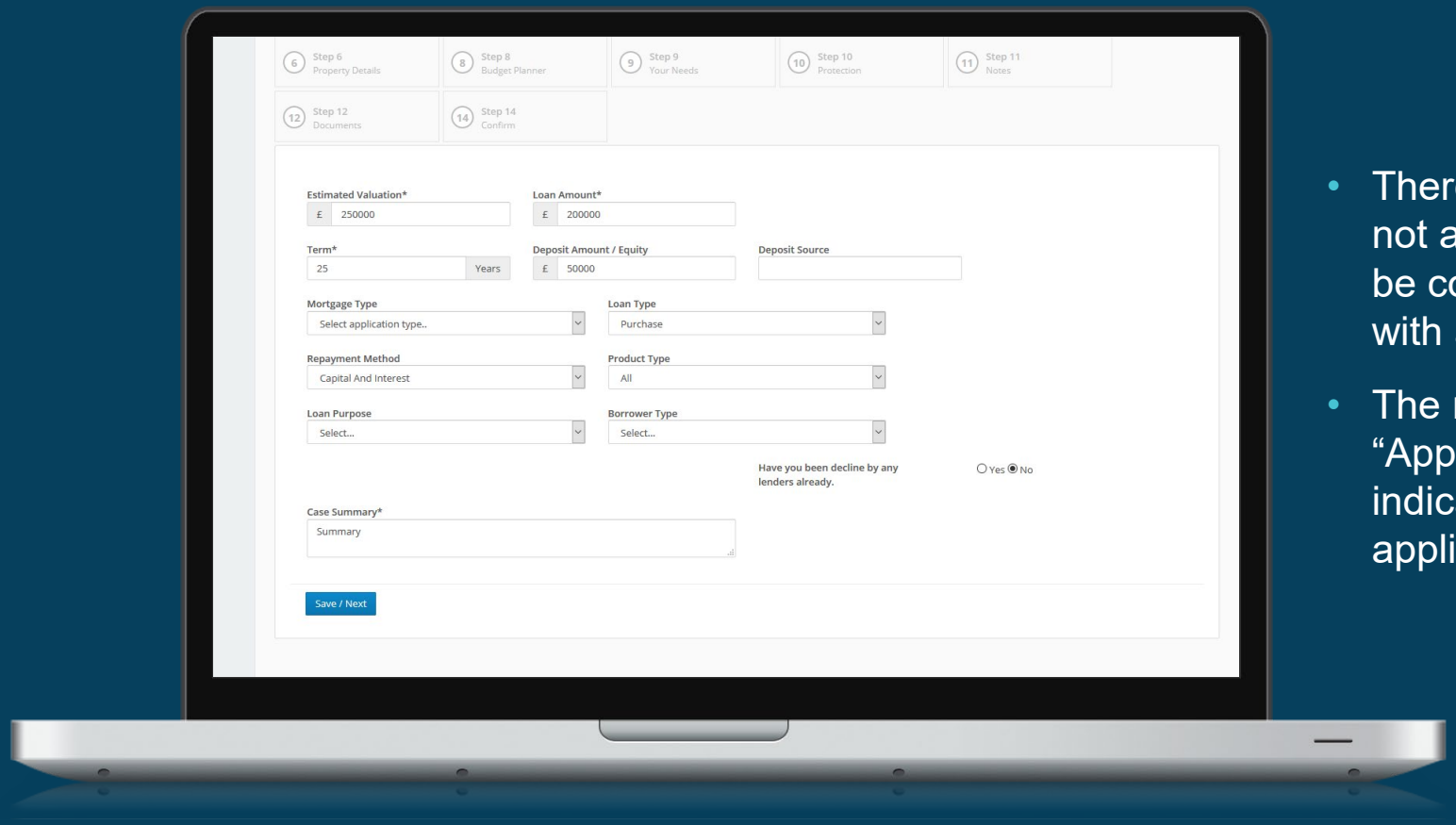
Creating a New Factfind

- If you haven't been invited to a case and need to create a brand new factfind, log into the portal if you have a registered account and click on the 'Start Factfind' button.
- If you haven't got a registered account, speak to your adviser who can send you the link to register.
- This will open blank factfind for you to fill out and submit to your adviser. Once you have submitted the case, they will receive notification that you have done so.



Completing the Factfind

- Once you've started the factfind, you'll fill in the fields required and then submit to your adviser. Your factfind will save as you go through the steps so you can partially fill it out and come back to it another time if you are not ready to submit the case.

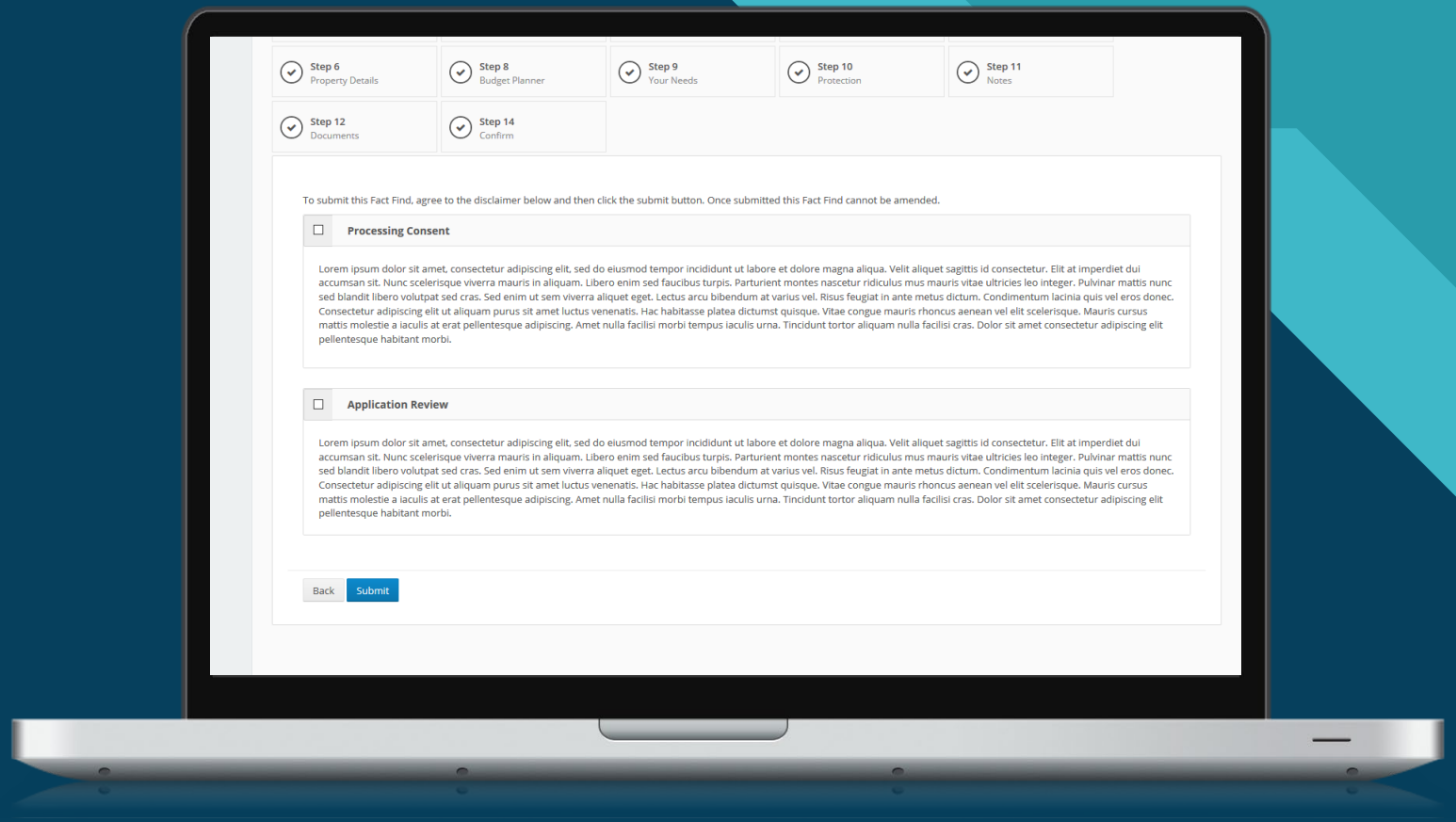


- There are 15 steps in the factfind, but not all information in each step needs to be completed, only the fields marked with a *
- The main field to be aware of is the "Application Type" field on step 1 as this indicates the type of mortgage application you want to process.

Submitting Fact Finds

- Once you reach the end of the Fact Find there will be a disclaimer to confirm for processing and credit search consent.

- Your adviser will receive an email notification whenever you complete and submit a Fact Find.
- Once you have submitted the factfind you will be unable to edit it, however, if you need to amend any information contact you adviser who will be able to make the change.
- If a lot of information on a previous case is the same as a new case you are submitting, ask you adviser to copy over the details to a new factfind for you to complete.



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