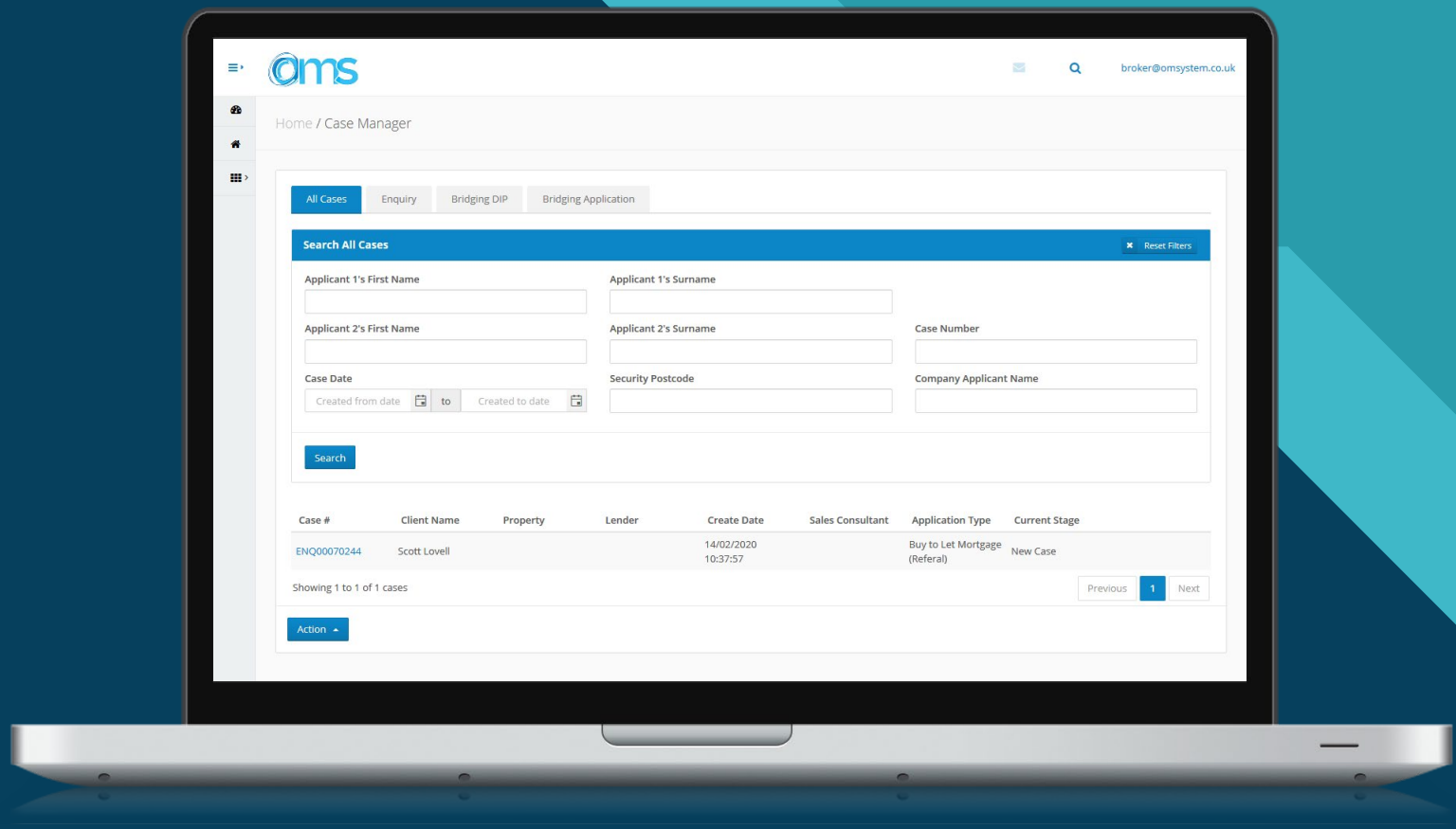
One Mortgage System

How to create and submit a DIP in OMS.

Starting a DIP

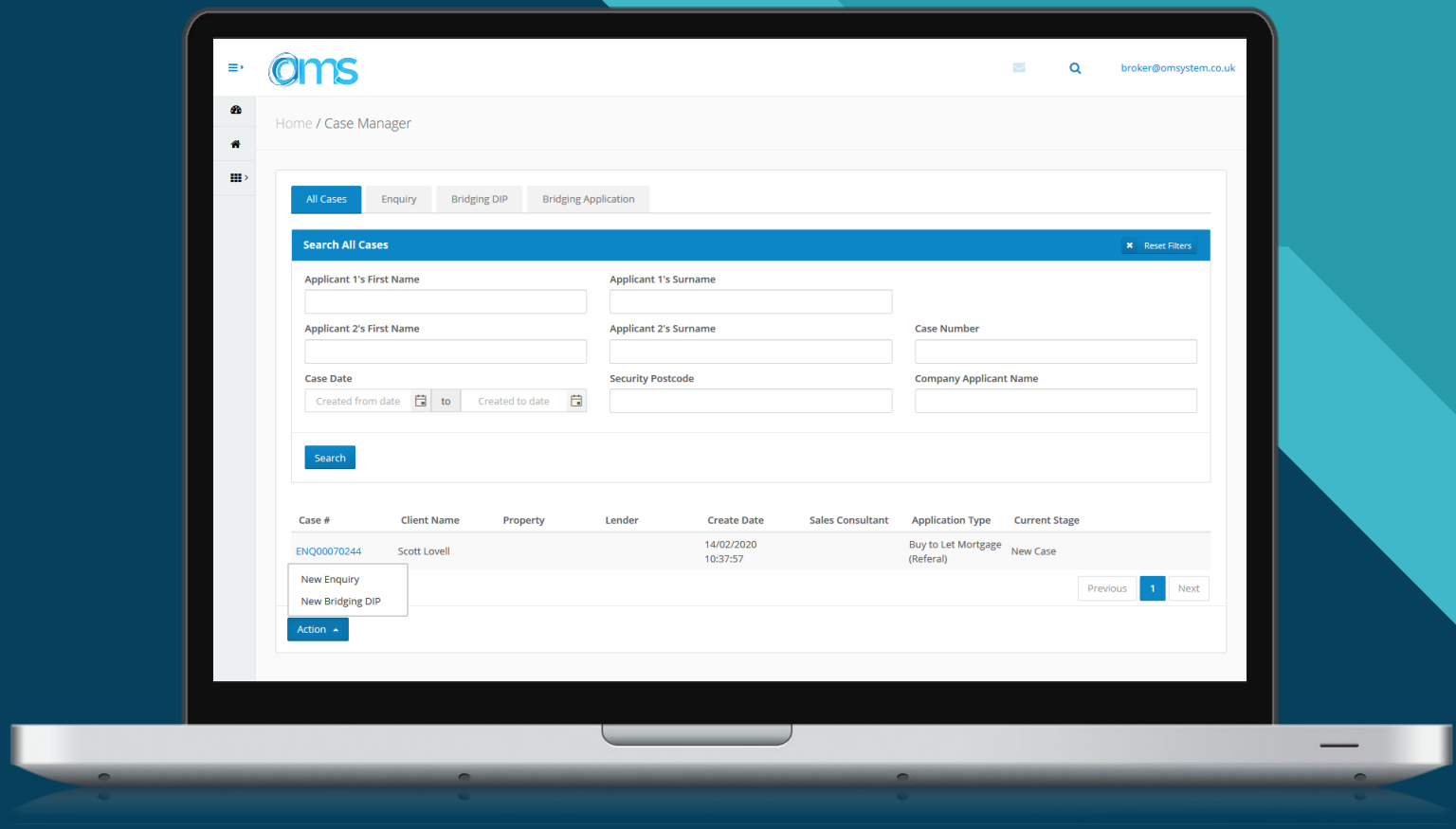
Introducer Portal

- When you log in, you will be greeted with the Home page. Click on Cases to see the full list of your cases that have been put on OMS.
- If you haven't got a registered account, speak your sales consultant who can send you the registration link.
- OMS will receive notification when you submit a case through to them and will be in contact after this.



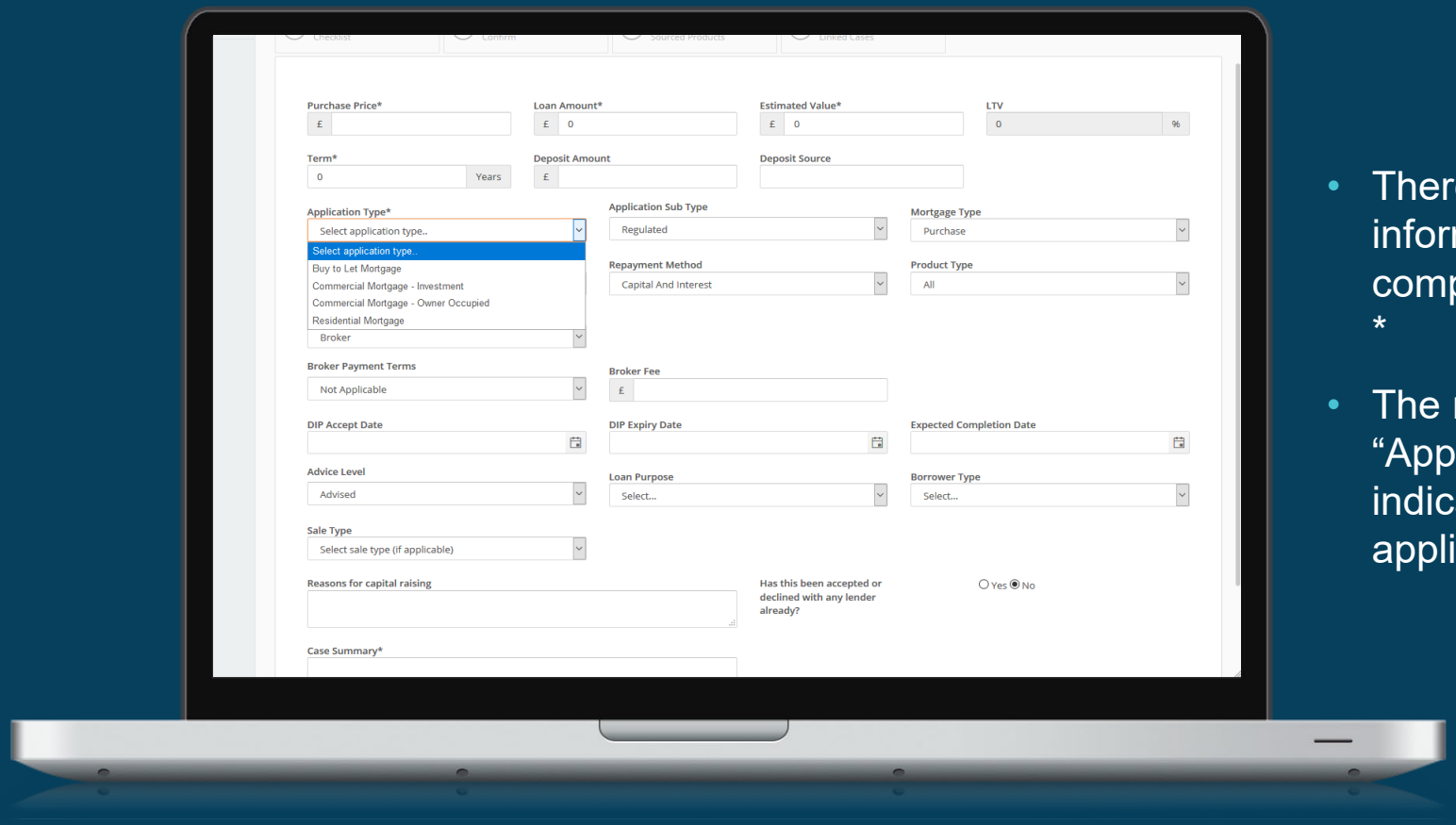
Creating a New DIP

- If you want to create a new DIP, log into the portal with your registered account, go to cases and click on the action button. This will give you the option to create a new case.
- This will open a blank DIP for you to fill out and submit to the packaging team.
- If some of the information on a previous case is the same as the new case you are submitting, click on Case Options on the previous case, select the information you would like to copy and click create.



Completing the DIP

- Once you've started the DIP, you'll fill in the fields required and then submit to the packaging team. Your DIP 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.

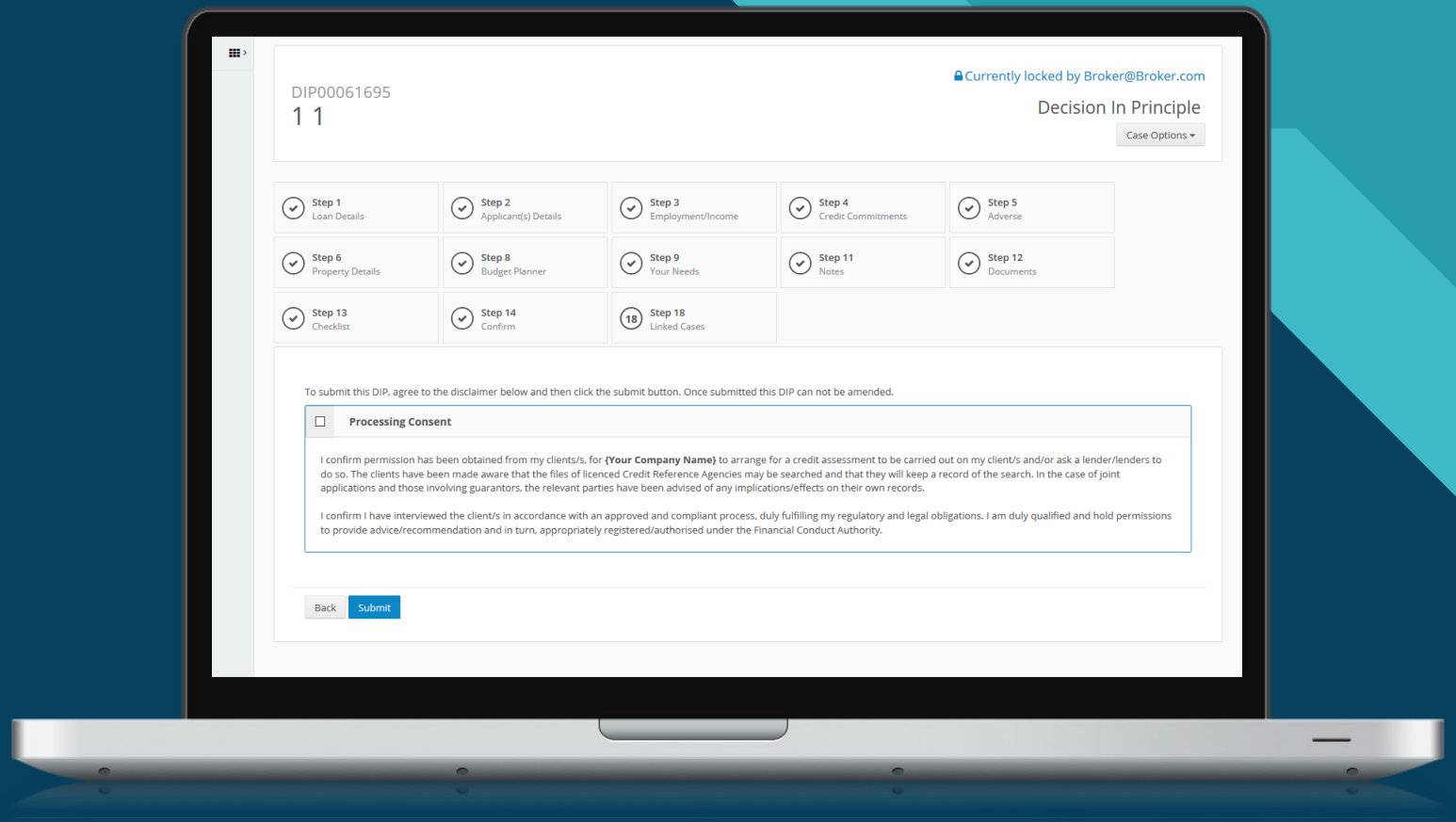


- There are 15 steps in the DIP, but not all information in each step needs to be completed, only the fields marked with a *
- The main field to be aware of is the "Application Type" field on step 1 as this indicates the type of mortgage application you want to process.

Submitting the DIP

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

- Your adviser will receive an email notification whenever you complete and submit a DIP.
- Once you have submitted the DIP you will be unable to edit it, however, if you need to amend any information contact your Sales Consultant who will be able to make the change.



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