



Canadian Mortgage Technology

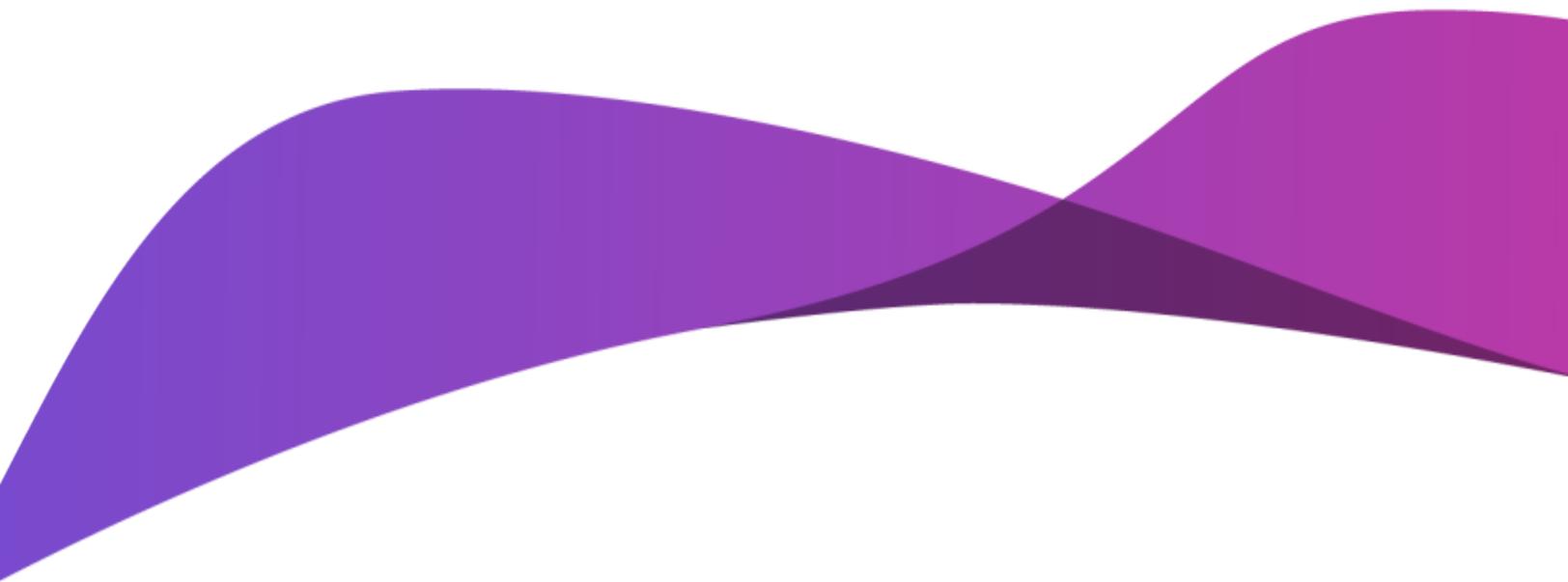
Filogix Expert Release Notes

Release "EB 20.3"

Release Date: July 11th, 2020

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Overview

The July 2020 Expert Broker release includes various enhancements and maintenance fixes including:

- Access to Nationwide Appraisal Services
- Changes to the Forms Screen – Mortgage Application and Mortgage Summary
- Employment Address Business Rules - Soft to Hard Stop
- Removal of 'other' Option from Lender Drop Down
- Scotiabank Form Updates
- Quebec Licensing Change

Special Note: Everyone using Filogix Expert MUST clear your browser cache after the release. Instructions for clearing your browser cache are available from the Expert sign-on page and by accessing the provider's support sites using the links below:

Internet Explorer:

<https://support.microsoft.com/en-ca/help/260897/how-to-delete-the-contents-of-the-temporary-internet-files-folder>

Firefox :

<https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>

Chrome :

https://support.google.com/chrome/answer/2392709?hl=en&ref_topic=7438008&co=GENIE.Platform%3DDesktop&oco=1

Access to Nationwide Appraisal Services

Filigix is pleased to announce that Nationwide Appraisal Services (NAS) is the newest member of the Filigix Mortgage Marketplace. In addition to being able to submit appraisal orders to Value Connect, you are now able to request an appraisal from NAS from within your Filigix Expert deal. Details from your Filigix Expert application will auto-populate the NAS Appraisal order. In addition, you can single sign on to the NAS portal to complete your appraisal order:

Orders can be initiated from the Subject Property section of the application:

Subject Property Information

Occupancy: Owner-Occupied | Address Lookup: Start typing your address...

Unit: 241 | Street Number: 2565 | Name: Broadway | Type: | Direction: W

City: Vancouver | Province: BC | Postal: V6K 2E9

Lot: 1000 | Block: 1000 | Conc./Township: 1000 | MLS Listing: No

Construction Type: Existing | # of Units: 1

Type: Detached | Style: One Storey

Tenure: Freehold | Age: 2

Living Space: 500 Sq Ft | Garage Size: Single

Lot Size: 500 Sq Ft | Garage Type: Attached

Heat: Electric Baseboard | Environmental Hazard: No

Water Info: Municipal | Sewage Info: Municipal

Annual Taxes: 2,000.00 /y | Hydro: /m

Tax Year: 2018 | Insurance: /m

Paid By: Borrower | Mgmt: /m

Total Condo Fees: 60.00 /m | Repairs: /m

Include % of Total Condo Fees: 0 % | Interest: /m

Fees Incl. Heat: | Other: /m

Heating: 81.00 /m | Total Exp: 127.67 /m

Rental Income: 0.00 /m

Rental Inc. Options: None

Inclusion/Offset: 0.00 %

Purchase Price: 1,100,000.00 | Select:

Estimated Value: 900,000.00 | Select:

Appraised Value: | Select:

Appraisal Date: | Request Appraisal

Or the Services page:

Appraisal Services

[Request / Review Appraisal](#)

Simply select NAS from the Provider drop down, along with the desired product, complete the remaining fields and submit your request once all hard stops have been addressed.

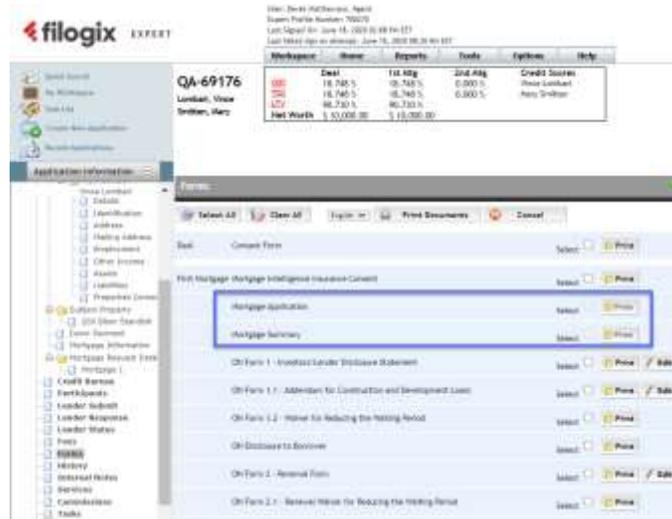
After your initial submission, click on the View Order button to complete your order on the NAS portal.

Appraisal Order Summary					Refresh
Status Date/Time	Confirmation Number	Provider	Product	Submission Status	
June 23, 2020 04:38 PM EST	1539766	NAS	Full-Service	Successful - Action Required	View Order

Changes to the Forms Screen – Mortgage Application and Mortgage Summary

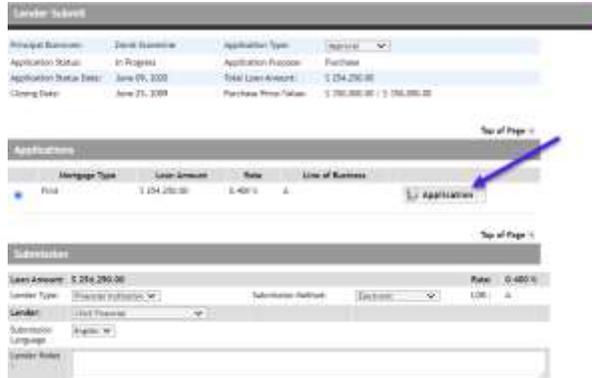
In order to better protect our users, your customers and all our industry partners, Filogix has made changes to how information flows within and out of Filogix Expert:

- **Print Buttons on Form Screen Disabled:** Prior to a lender submission (electronic or manual), the Print buttons along with the checkmarks beside them on the Forms screen will be disabled.
- Once the deal has been submitted the Mortgage Application will be available to print from either the Lender Submit screen or the Forms screen.

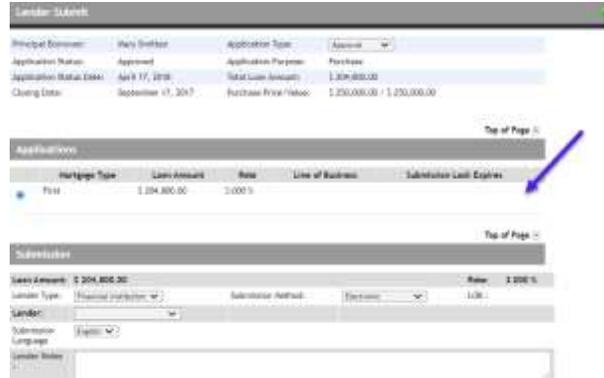


Create Mortgage Application Button Removed from Lender Submit Page: The button that allows users to create the Mortgage Application document from the Lender Submit page has been removed. Once the deal is submitted to a lender you can print the Mortgage Application from either the LenderSubmit Screen or from the Forms Screen.

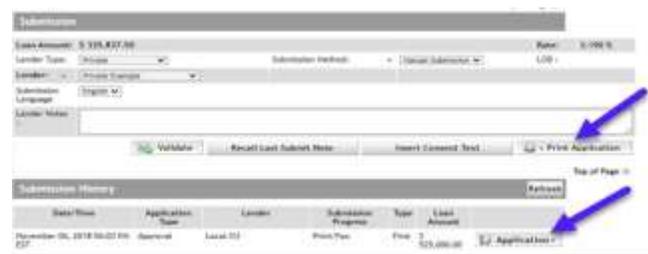
Before:



After:



You can continue to print the application via the manual submit option, or through the Application button in the history section of the Lender Submit screen after you have submitted the file to a lender.



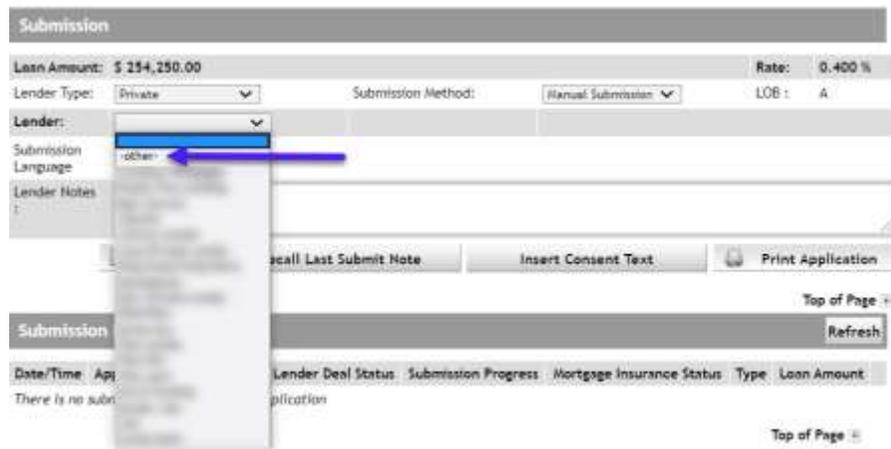
Maintenance Items

Employment Address Business Rules – Severity Change

In order to improve Filogix Expert's data quality, two existing soft stop business rules (MFA-0325 and MFA-0330) have been updated to hard stops to ensure address line 1 and city are completed for an applicant's employment.

Removal of the “-other-“ Option in the Lender Drop Down

In order to ensure transparency and compliance, the existing '-other-' lender option was removed from the lender drop down list in the Lender Submit page.



The screenshot shows the 'Submission' form in Filogix Expert. The 'Lender' dropdown menu is open, and the '-other-' option is highlighted with a blue arrow. The form includes fields for Loan Amount (\$ 254,250.00), Rate (0.400 %), Lender Type (Private), Submission Method (Manual Submission), and LOB (A). There are also buttons for 'Call Last Submit Note', 'Insert Consent Text', and 'Print Application'. The page has a 'Top of Page' link and a 'Refresh' button.

*Please note: This change was made shortly before this release.

As a result of this update, if you need to add a manual lender to the Lender drop down, you can continue to do so using the Participants screen.

Steps required to add a private lender can be found within the Expert Help file under Help → Participants and Users → Adding a Private Lender to Expert

Scotiabank Insurance Form Updates

Minor verbiage updates have been made to Scotiabank's Mortgage Protection Application form available in Filogix Expert.

Quebec Licensing Format Change

Changes have been made by the Autorité des Marchés Financiers (AMF) to the licensing format for mortgage brokers / firms. Updates to Filogix Expert have been made to ensure users can enter license numbers using either the old and new formats.



The future of digital finance can start here.
Consider our planet before printing.

About Filogix

Filogix has served as the hub of the Canadian mortgage industry for almost two decades, offering secure, reliable connectivity to brokers and lenders. We provide trusted mortgage lending products, that enable the effective management of the sales process from origination through underwriting. As the mortgage landscape continues to change, Filogix is prioritizing advances to support the industry into the future. We're investing in a more open infrastructure and building connectivity to create a complete mortgage marketplace, helping mortgage professionals do business with more choice, speed and reliability than ever before. Learn more at [filogix.com](https://www.filogix.com)

Filogix Headquarters

199 Bay Street,
Suite 4400,
Toronto, ON M5L 1E2