

Canadian Mortgage Technology

# Filogix Expert Release Notes

Release "EB 20.3" Release Date: July 11<sup>th</sup>, 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**

Filogix is pleased to announce that Nationwide Appraisal Services (NAS) is the newest member of the Filogix 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 Filogix Expert deal. Details from your Filogix 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:

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

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								
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.

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**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.

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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.

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## **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.

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\*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  $\rightarrow$  Participants and Users  $\rightarrow$  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** 

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