



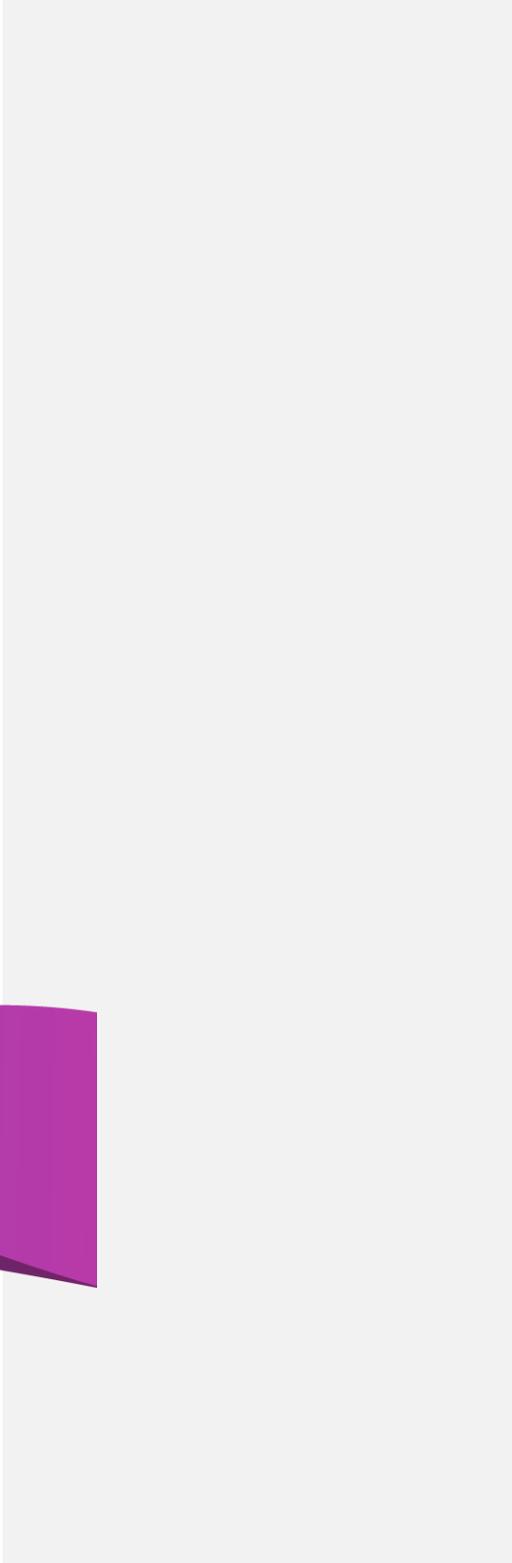
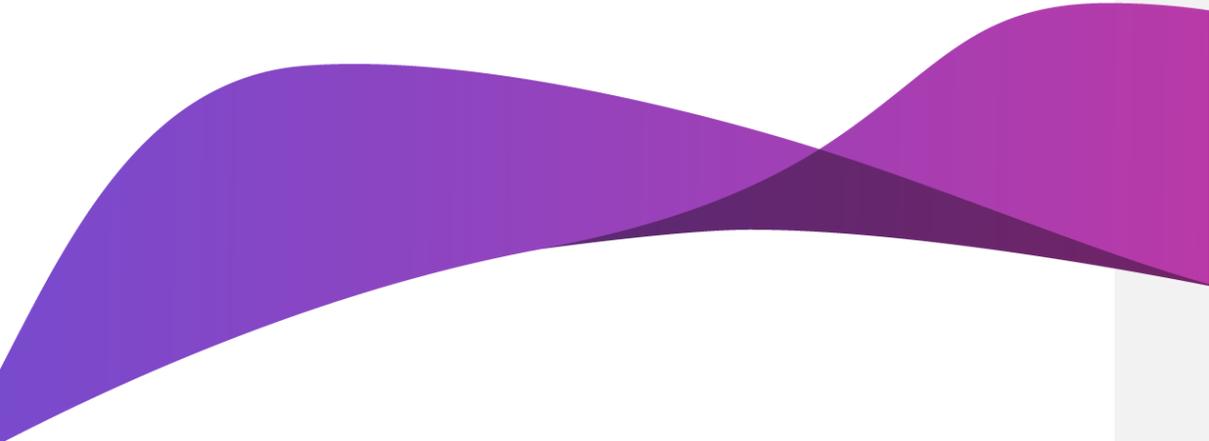
Canadian Mortgage Technology

# Filogix Expert Release Notes

Release Date: March 31<sup>st</sup>, 2026

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## Overview

The March 2026 Expert Broker release includes the following enhancement:

- Sun Life referral service integration

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:

Microsoft Edge:

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

## Sun Life Referral Service

We are pleased to announce a new partnership and integrated connection with Sun Life. For firms already contracted with Sun Life for Mortgage Protection Insurance, your Expert Broker users can now seamlessly send insurance referral requests directly from their deals.

This new capability provides a simple and secure way to transfer client and deal information to Sun Life, who will manage the entire follow-up process independently of the Expert Broker application.

### Submitting a Referral

Expert Broker users can access the **Mortgage Protection Insurance** button from the Applicant Details section. This button is displayed for all applicant types except guarantors, as guarantors are not eligible for insurance coverage.

The screenshot displays the Expert Broker application interface. At the top, the user is identified as Margaret Ng, Agent, with a session time remaining of 29:06. A navigation menu on the left includes options like Quick Search, My Workspace, Task List, and Application Information. The main content area shows a table of deals for application EXBA-988, with columns for Deal, 1st Mtg, 2nd Mtg, and Credit Scores. Below the table, the 'Details' section is active, showing information for two applicants: Applicant 1 (Ben Button) and Applicant 2 (Brenda Button). The 'Mortgage Protection Insurance' button is highlighted in yellow at the bottom right of the interface.

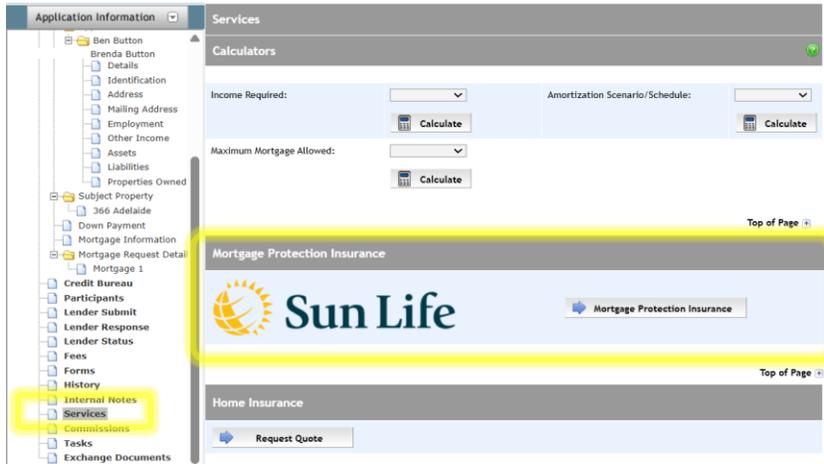
Deal	1st Mtg	2nd Mtg	Credit Scores
GDS	11.102 %	11.102 %	0.000 %
TDS	11.102 %	11.102 %	0.000 %
LTV	52.170 %	52.170 %	
Net Worth	5,495,000.00	5,495,000.00	

Applicant 1: Ben Button, Married, DOB: JUN 15 1983, Email: ben@button.com

Applicant 2: Brenda Button, Married, DOB: NOV 18 1986, Email: [Redacted]

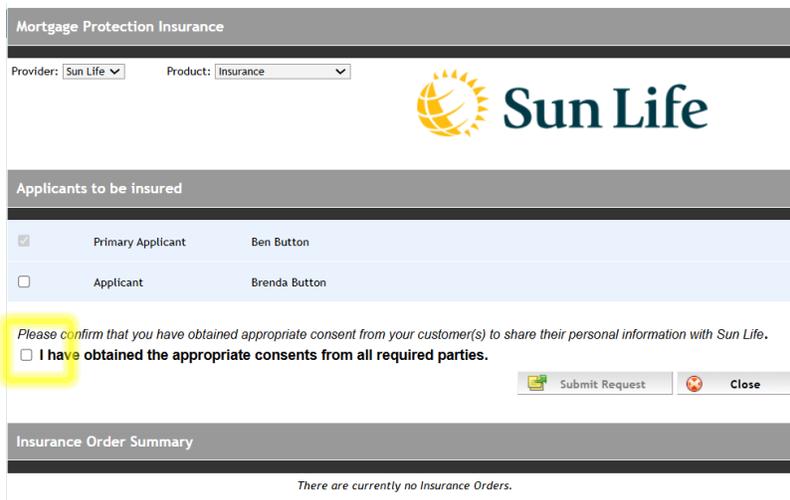
Mortgage Protection Insurance button highlighted in yellow.

Alternatively, Mortgage Protection Insurance is also accessible through the **Services** link.



Pressing this button opens a new **Mortgage Protection Insurance** page. The **Provider** and **Product** fields will default to **Sun Life** and **Insurance** respectively. In the **Applicants to be Insured** section, the primary applicant will always be pre-selected and included with a submission to Sun Life. Other eligible applicants will also be listed - use the checkbox to include them in the request for insurance.

Before submitting, ensure you have received the required client approvals. Then select the confirmation checkbox to enable the **Submit Request** button. To exit out of the screen, use the **Close** button.



## Validation and Submission Status

Once the submission button is pressed, the system will verify that all mandatory information required by Sun Life has been provided. If any information is missing, a pop-up message identifying the required corrections will appear. Make the necessary updates to the deal before attempting to resubmit.

	Deal	1st Mtg	2nd Mtg	Credit Scores
<b>EXBA-988</b>				
GDS	11.102 %	11.102 %	0.000 %	Ben Button
TDS	11.102 %	11.102 %	0.000 %	Brenda Button
LTV	52.170 %	52.170 %		
Net Worth	\$ 495,000.00	\$ 495,000.00		

Mortgage Protection Insurance - Google Chrome

about:blank

### Mortgage Protection Insurance Request

Some information is missing or incorrect. Please correct the following fields below.

- Address postal FSA is required for Brenda Button
- Address postal LDU is required for Brenda Button
- Email address is required for Brenda Button

 Close

Provider: Sun Life Product: Insurance

#### Applicants to be insured

Role	Name
<input checked="" type="checkbox"/> Primary Applicant	Ben Button
<input type="checkbox"/> Applicant	Brenda Button

Please confirm that you have obtained appropriate consents from all applicants.

I have obtained the appropriate consents from all applicants.

#### Insurance Order Summary

There are no items in the order summary.

Once a request is sent, it will appear in the **Insurance Order Summary** with a status of **Submitted**.

**Mortgage Protection Insurance**

Provider: Sun Life    Product: Insurance



**Applicants to be insured**

<input checked="" type="checkbox"/>	Primary Applicant	Ben Button
<input type="checkbox"/>	Applicant	Brenda Button

Please confirm that you have obtained appropriate consent from your customer(s) to share their personal information with Sun Life.

I have obtained the appropriate consents from all required parties.

Submit Request    Close

**Insurance Order Summary** Refresh

Status Date/Time	Name	Provider	Product	Submission Status
March 19, 2026 12:50 PM EST	Ben Button Brenda Button	Sun Life	Insurance	Submitted

Use the **Refresh** button to view status updates. Once the request has been successfully received by Sun Life, the status will update to **Delivered**.

**Insurance Order Summary** Refresh

Status Date/Time	Name	Provider	Product	Submission Status
March 19, 2026 12:50 PM EST	Ben Button Brenda Button	Sun Life	Insurance	Delivered

For tracking purposes, all submissions to Sun Life will be captured in the History log.

**History** ?

Transaction History

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Date	Type	User ID	Status	Description
March 19, 2026 12:50 PM EST	Interface	Ng, Margaret	In Progress	Submitted to Insurance Provider: Sun Life

## Introducing Prospr by Sun Life

As Prospr by Sun Life, we're a part of Sun Life and its 160 years of helping Canadians achieve life financial security.

When you work with Prospr, you can count on:

- **Partnership appreciation** to support your business growth.
- **Confidence in your referrals** because we underwritten upfront with no commitment from the client. Enjoy giving clients peace of mind knowing that they're covered.
- **Watching the work get done** because we work with your clients to [handle the application] and we'll send you regular updates, too.

It's easy to get in touch with us [here](#). Reach out to our inbox or one of our business development managers.

Thanks!

The mortgage protection team at Prospr

### Disclaimers

Prospr by Sun Life™ is a business division and trade name of Sun Life Financial Distributors (Canada) Inc. and Sun Life Financial Investment Services (Canada) Inc. Insurance products are distributed through Sun Life Financial Distributors (Canada) Inc. Mutual funds are distributed through Sun Life Financial Investment Services (Canada) Inc.

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#### **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)

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