



Canadian Mortgage Technology

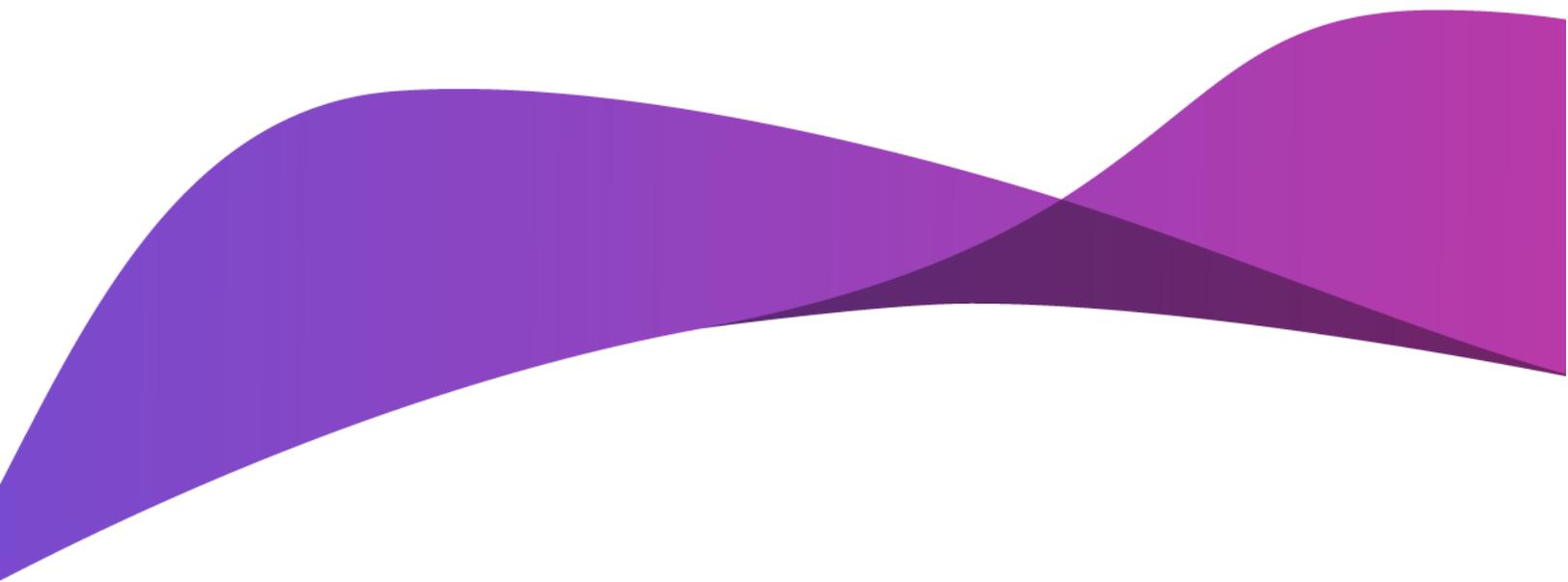
# Filogix Expert Release Notes

Release "EB 21.3"

Release Date: August 7<sup>th</sup>, 2021

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## Overview

The August 2021 Expert Broker release includes various enhancements and maintenance fixes including:

- Access to Surex for Home Insurance Requests
- Updates to New Brunswick Disclosure Forms

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

# Access to Surex

Filogix is pleased to announce that Surex is the newest member of the Filogix Mortgage Marketplace. You are now able to request a home insurance quote for your clients with a click of a button. The referral will be electronically submitted to Surex to start the home insurance process. You can submit your referral from the Subject Property section within Expert.

To request a quote for Home Insurance, complete the following steps:

Initiating the quote from the Subject Property section of the application:

1. Click the "Home Insurance Quote" button at the bottom of the section

**Subject Property Information**

Occupancy: **Owner-Occupied & Rental** Address Lookup:

Unit:  Street Number:  Name:  Type: **Acres** Direction: **E**

City:  Province: **ON** Postal:

Lot:  Block:  Conc./Township:  MLS Listing: **Yes**

Construction Type: **New** # of Units:

Type: **Tri Plex - Detached** Style: **Storey and a Half**

Tenure: **Condo** Age:

Living Space:  Sq Ft Garage Size: **Triple**

Lot Size:  Sq Ft Garage Type: **Detached**

Heat: **Electric Baseboard** Environmental Hazard: **No**

Water Info: **Municipal** Sewage Info: **Holding Tank**

Annual Taxes:  /y Hydro:  /m

Tax Year:  Insurance:  /m

Paid By: **Borrower** Mgmt:  /m

Total Condo Fees:  /m Repairs:  /m

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

Fees Incl. Heat:  Other:  /m

Heating:  /m Total Exp:  /m

Include in TDS calculation

Rental Income:  /m

Rental Inc. Options: **Add Percentage to Gross Income**

Inclusion/Offset:  %

Purchase Price:  Select:

Estimated Value:  Select:

Appraised Value:  Select:

Appraisal Date:

2. Once you have obtained your client's consent, check the tick box below:

**Subject Property Information**

**Home Insurance Request**

Provider: **Surex** Product: **Home Insurance**



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

I have obtained the appropriate consents from all required parties.

Annual Taxes:  /y Hydro:  /m

Tax Year:  Insurance:  /m

Paid By: **Borrower** Mgmt:  /m

Total Condo Fees:  /m Repairs:  /m

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

Fees Incl. Heat:  Other:  /m

Rental Income:  /m

Rental Inc. Options: **Add Percentage to Gross Income**

Inclusion/Offset:  %

Purchase Price:  Select:

Estimated Value:  Select:

Appraised Value:  Select:

3. Select the 'Submit Request' button to request a quote

Subject Property Information

Home Insurance Request

Provider: Surex Product: Home Insurance

Occupancy: Owner-Occupied & Rental  
Unit: 22 Street Number: 1830  
City: Paris Province: C  
Lot: lot Block:  
Construction Type: New  
Type: Tri Plex - Deta  
Tenure: Condo  
Living Space: 1,230  
Lot Size: 12,300  
Heat: Electric Baseb  
Water Info: Municipal

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

I have obtained the appropriate consents from all required parties.

Submit Request Close

Annual Taxes: /y Hydro: 42.00 /m  
Tax Year: 2021 Insurance: 44.00 /m  
Paid By: Borrower Mgmt: 45.00 /m  
Total Condo Fees: 150.00 /m Repairs: 46.00 /m  
Include % of Total Condo Fees: 50 % Interest: 43.00 /m  
Fees Incl. Heat: Other: 41.00 /m  
Heating: 111.00 /m Total Exp: 577.00 /m

Rental Income: 166.67 /m  
Rental Inc. Options: Add Percentage to Gross Income  
Inclusion/Offset: 0.000 %

Purchase Price: 500,000.00 Select:   
Estimated Value: 400,000.00 Select:   
Appraised Value: 700,000.96 Select:

4. If any hard stops are triggered, you will need to address them and submit the request. Once all hard stops have been cleared, your submission will return a response from Surex

Subject Property Information

Home Insurance Request

The following message(s) were received from Surex:

Thank you for referring your customer to Surex, we will contact them soon.

Close

Occupancy: Owner-Occupied & Rental  
Unit: 22 Street Number: 1830  
City: Paris Province: C  
Lot: lot Block:  
Construction Type: New  
Type: Tri Plex - Deta  
Tenure: Condo  
Living Space: 1,230  
Lot Size: 12,300  
Heat: Electric Baseb  
Water Info: Municipal

Annual Taxes: /y Hydro: 42.00 /m  
Tax Year: 2021 Insurance: 44.00 /m  
Paid By: Borrower Mgmt: 45.00 /m  
Total Condo Fees: 150.00 /m Repairs: 46.00 /m  
Include % of Total Condo Fees: 50 % Interest: 43.00 /m  
Fees Incl. Heat: Other: 41.00 /m  
Heating: 111.00 /m Total Exp: 577.00 /m

Rental Income: 166.67 /m  
Rental Inc. Options: Add Percentage to Gross Income  
Inclusion/Offset: 0.000 %

Purchase Price: 500,000.00 Select:

Note: If you wish to view previous requests/responses, you can do so by visiting the Services page and selecting "Request Quote" under the Home Insurance header. You can also use this screen to request Home Insurance quotes.

Services  
Calculators 

Income Required:   Amortization Scenario/Schedule:

Maximum Mortgage Allowed:

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CRM 

CRM Extraction : CSV File:

[Top of Page](#)

Home Insurance 

Home Insurance Request

Provider:  Product:



Property to be Insured

Subject Property 22-1830 Cedar Acres E Paris, Ontario N9E 3R3

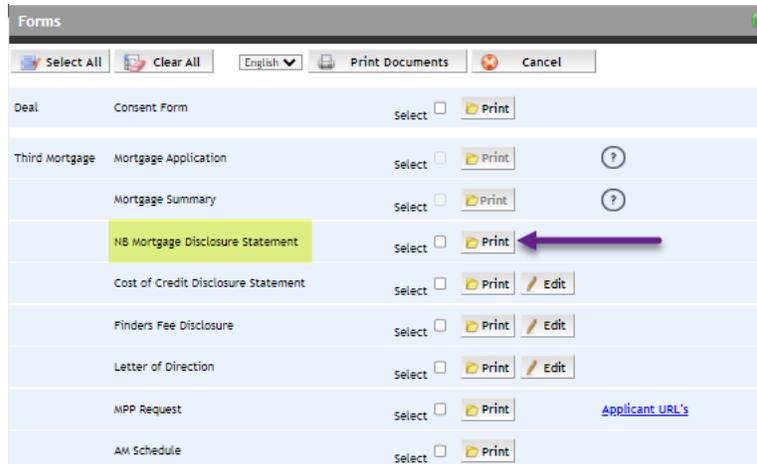
Insurance Order Summary

Status Date/Time	Confirmation Number	Provider	Product	Submission Status
July 05, 2021 02:33 PM EST	665414	Surex	Home Insurance	Successful - <a href="#">Details</a>

# Updates to the New Brunswick Disclosure Forms

The following updates have been made to the New Brunswick disclosure forms:

- A new “NB Mortgage Disclosure Statement” has been created, along with the ability to edit portions of its content. Simply click on the Print button to open the edit screen which cover both the Cost of Borrowing and Conflict of Interest sections



- As this form includes conflict of interest requirements, the old “NB Conflict of Interest” form has been removed
- The existing “NB Fixed Credit Disclosure Statement” has been renamed to “Cost of Credit Disclosure Statement” (onscreen and in form heading)

#### **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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