



Scarlett Mortgage

Release Note – Version 2.2.1





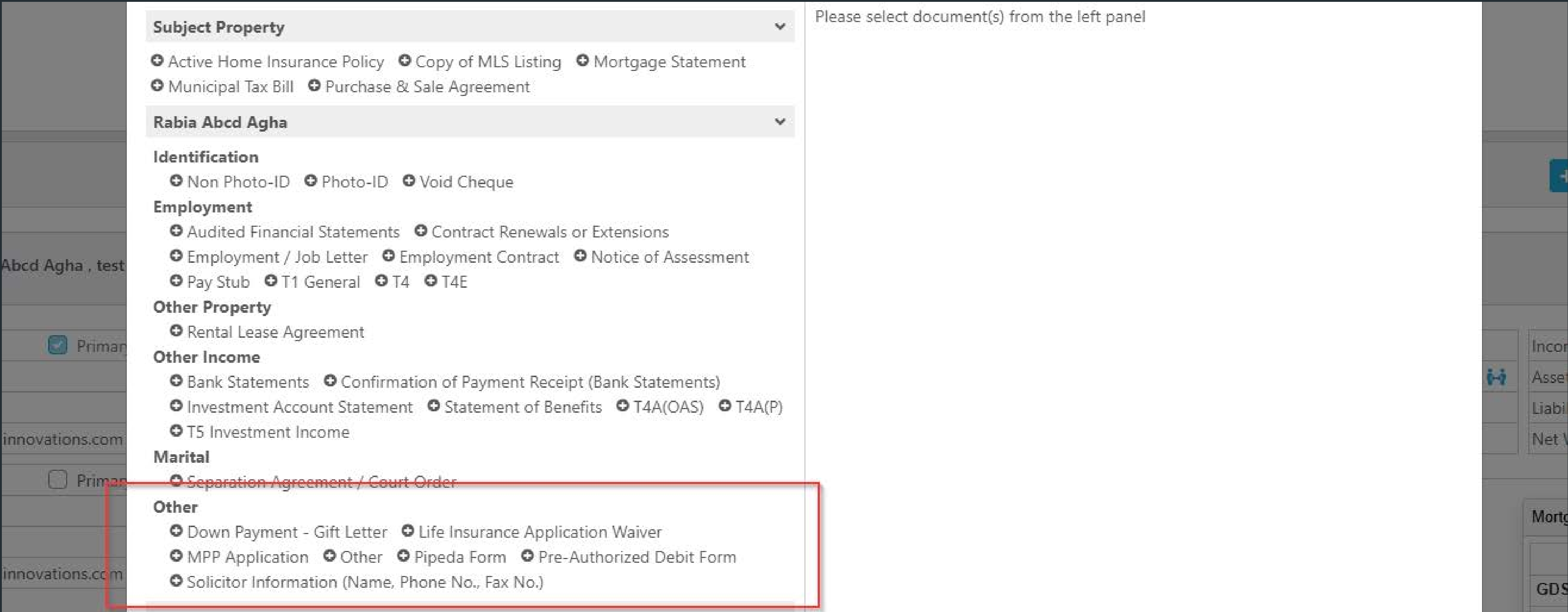
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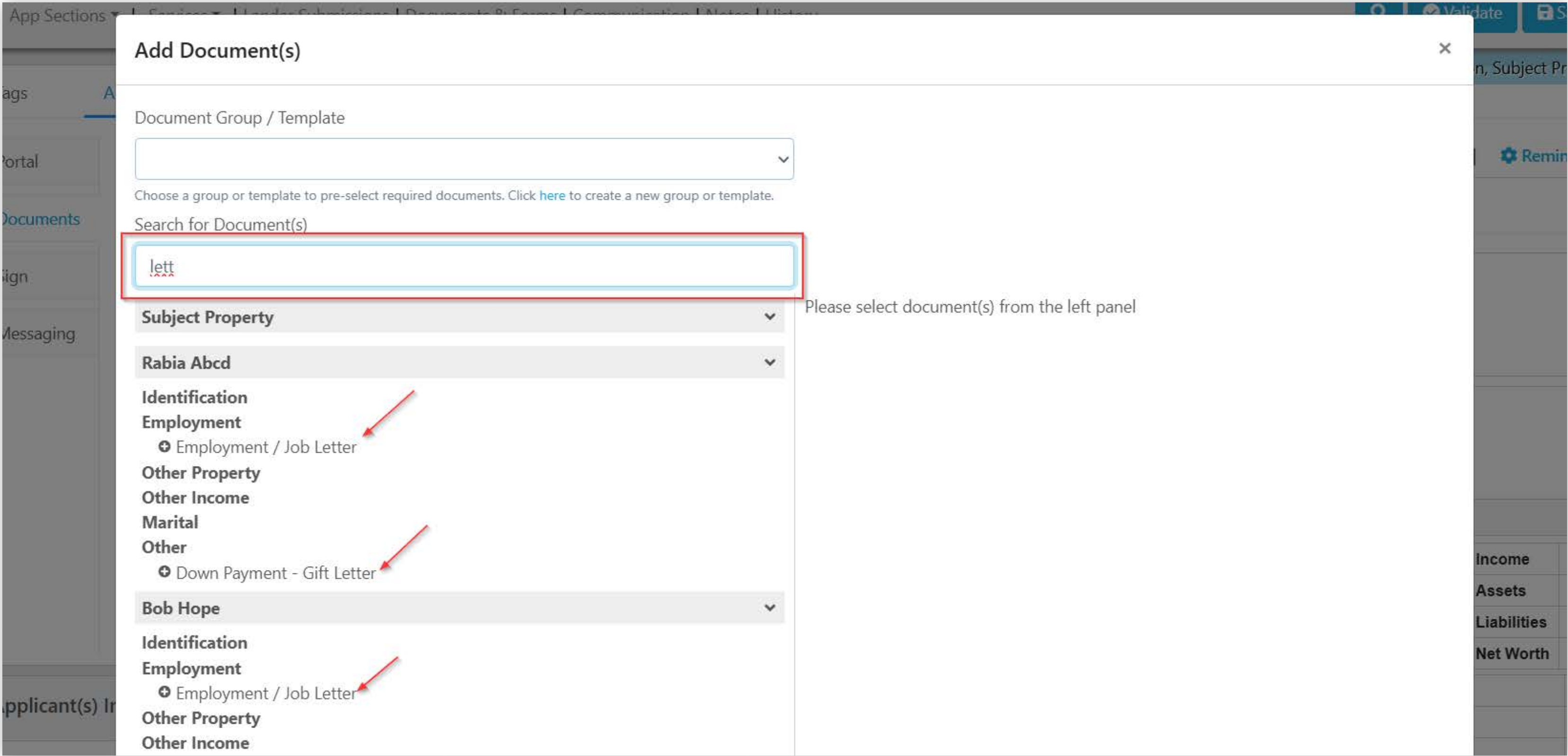
Enhanced Document Search in Client Portal

The Add Document list now includes documents under the category of "Other", enabling users to request documents from this category.



Category of "Other" displayed in the Add Document list.

Add Document(s) has a search field to look for specific documents to request, streamlining document management.



Searching for "lett" displays only the documents that have "lett" included in their title.

Self-Declared PEP Option Added for Co-Applicants

The application process now includes a PEP toggle for co-applicants, ensuring the declaration is saved correctly within each deal.

✓

Interview

✓

Subject Property

Applicant(s)

Realtor

Solicitor

Questions

Document(s)

Finalize

Contact Information

* Required Field

Salutation

First Name *

John

Last Name *

Jones

Date of Birth *

1990-05-26

SIN

Marital Status *

Married

Email Address *

Home Phone

(111) 222-3333

Mobile Phone

First-time homebuyer?

No

Politically Exposed Person (PEP)?

Yes

< BACK

NEXT >

PEP declaration toggle shows for co-applicants.

Previously, only the primary applicant could declare PEP, but now co-applicants can also do so, improving accuracy and compliance. This works whether the co-applicant is added or invited to the deal.



Internal Notes

Notes (EXUAx7892)

+ Add Internal Note

Export to PDF

Date	User	Category	Details
Jul 8, 2025 4:00 PM	Elias Karam	System	This application was generated by the following link source: https://my-scott-mortgage.com/loan/123456
Sep 24, 2025 1:50 PM	Elias Karam	General	Interested in HELOC Product - YES
Sep 24, 2025 1:51 PM	Elias Karam	General	John Jones is PEP - YES
Sep 24, 2025 1:53 PM	Elias Karam	General	James Jones is PEP - YES

PEP declaration captured in notes for applicant and co-applicant.

Improved MPP Document Upload Handling

MPP document upload now updated to fix an issue where Manulife did not receive uploaded forms due to filename duplication. The update appends a unique identifier to each file upon upload, ensuring MPP receives all documents correctly.

Application Number

200H476336BS1

Created Date

2025-10-03

Applicant(s)

2568334534 Ontario Inc

Mortgage Position

1st Mtg

Status

Awaiting Application/Waiver

Loan Amount

\$400,000.00

Option 1 - Download, Sign and Upload

This option is available should you want to look after all the different steps yourself.

1. First, download MPP application.

Download

2. Second, send application to each of the applicants to sign.

3. Third, once you have received the complete signed package simply upload the signed version which will upload directly to MPP.

Drop file(s) here or click to upload

Upload History

ApplicationsSummaryReport 1_Gs3y6BPm-Eab10Kyf2CDVA.pdf - 2025-10-03

ApplicationsSummaryReport 1_IFIBq8p-iUuOHJNqBtbvkQ.pdf - 2025-10-03

Option 2 - Electronic Signature

For this option you are not required to download the application to send it to each of the applicants.

Simply press the E-Sign button below to send application to all applicants for electronic signature. Once the application is successfully signed it will automatically upload to MPP and hence no other steps are required.

E-Sign

Option 3 - MPP Digital Link

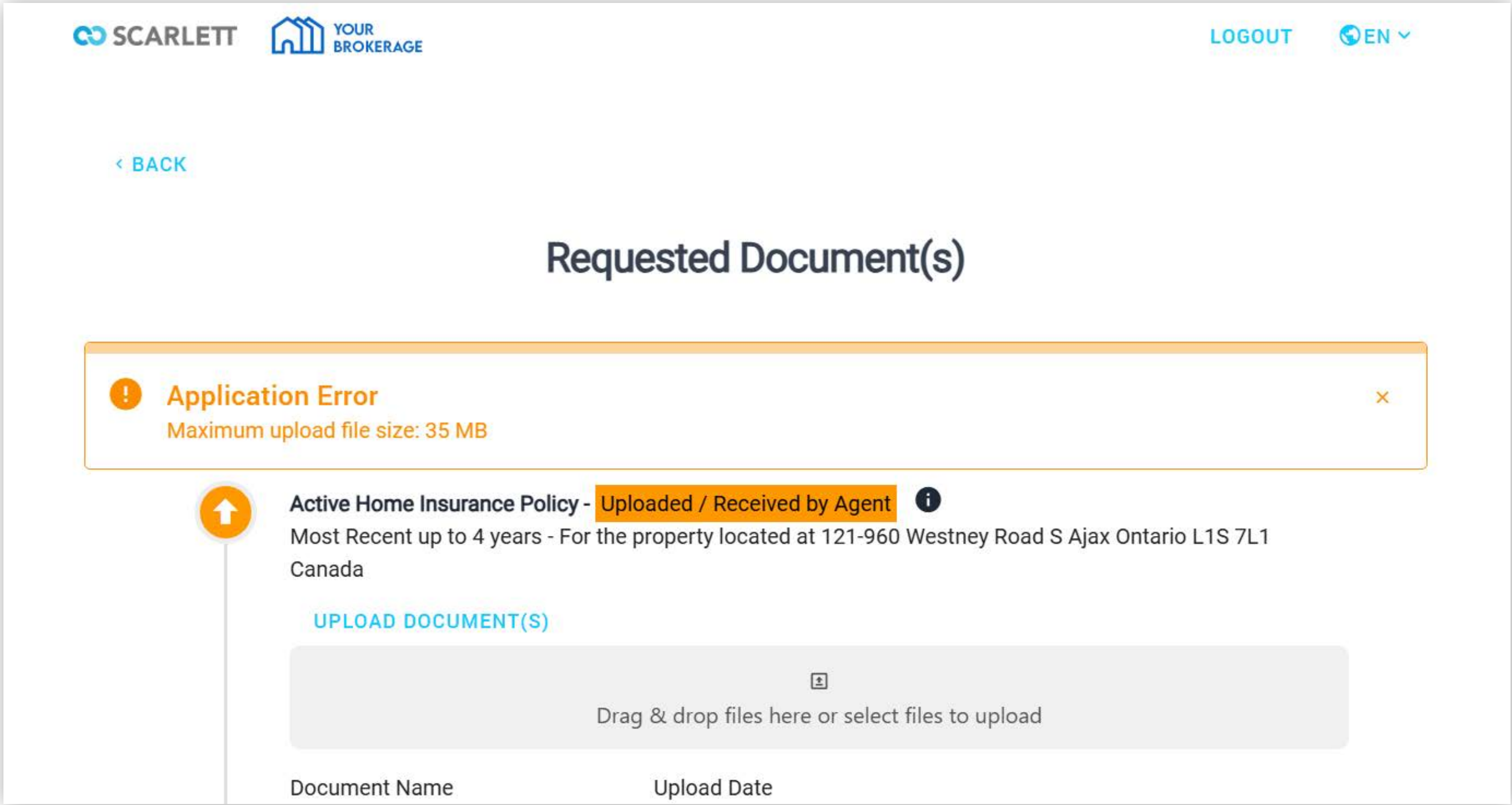
Similar to Option 2, you are not required to download the application to send it to each of the applicants. Simply press the "Send Digital Link" button to send each of the applicants their personalized quote.

Send Digital Link

Two documents uploaded were given unique file names so they do not overwrite each other.

Increased Upload Size Limit on Client Portal

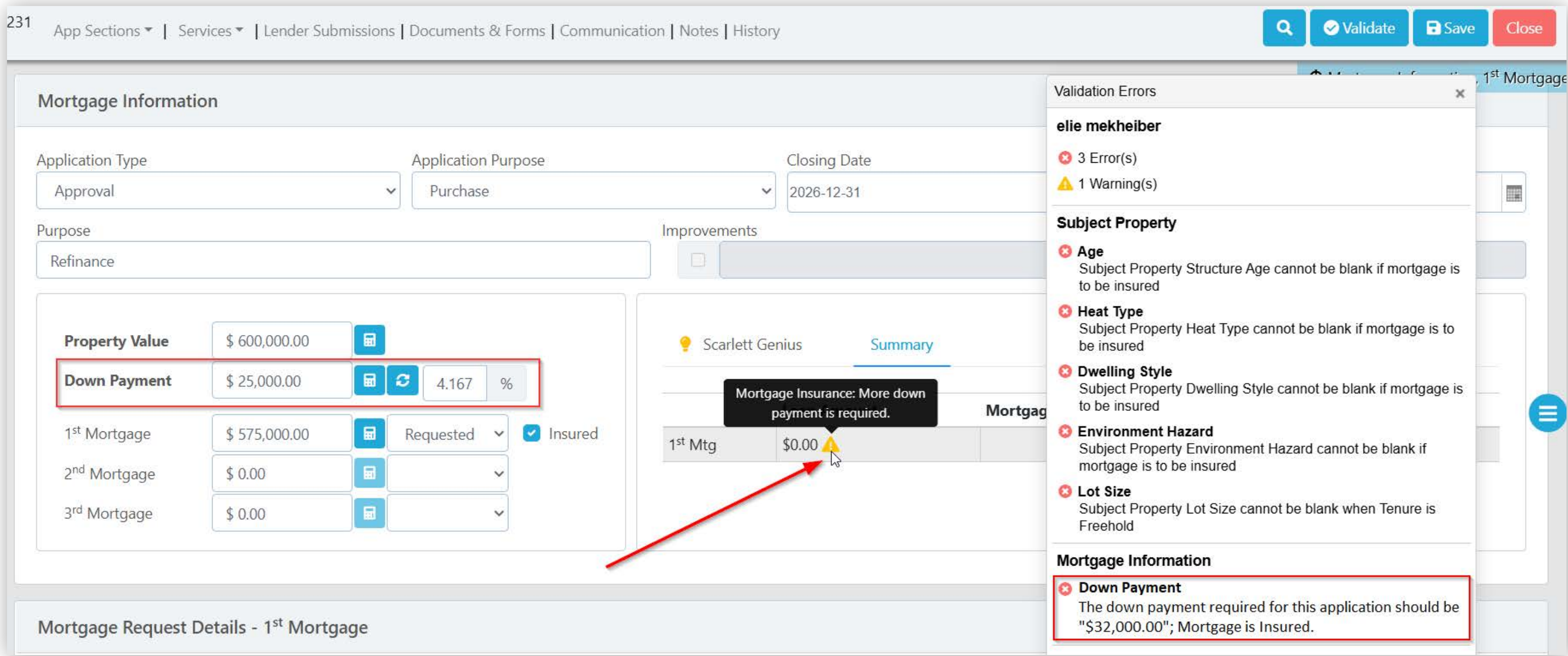
Documents up to 35MB can now be uploaded to the client portal, increased from the previous 20MB limit. This allows clients to upload larger files on their document portal.



Warning advising of the 35MB upload limit.

Validation for Minimum Down Payment on Insured Mortgages

Scarlett deal validations will now notify agents when the down payment does not meet the minimum requirement for an insured mortgage. This ensures agents are aware and are properly including insurance premiums in their deal qualification.

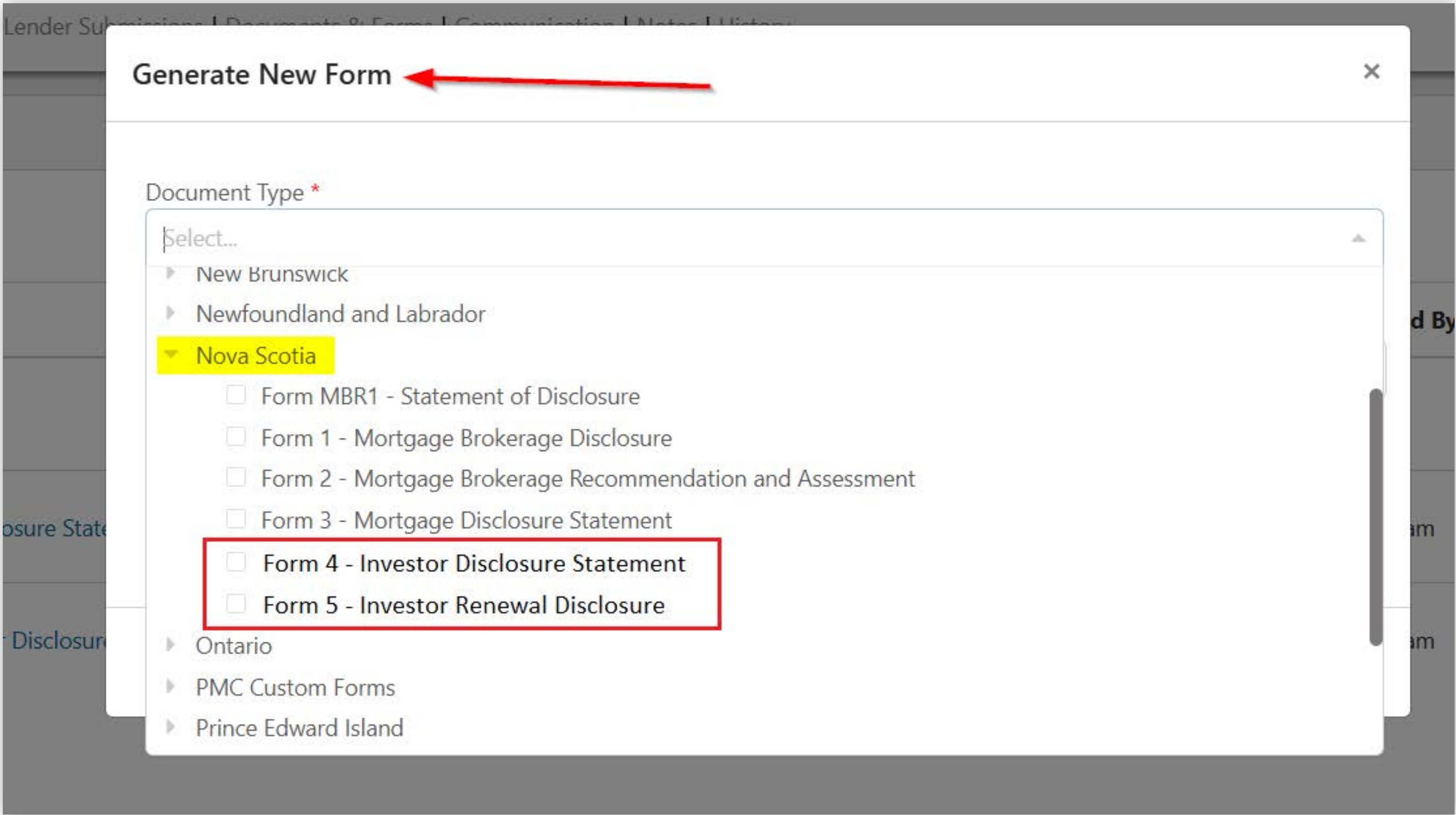


Validation stating required minimum down payment.

New Regulatory Forms for Nova Scotia

Nova Scotia forms are updated to comply with recent regulatory changes.

This includes the introduction of two new provincial investor disclosure forms: **NS Form 4** (Investor Disclosure Statement) and **NS Form 5** (Investor Renewal Disclosure), now available under the Nova Scotia folder in the Documents & Forms section.



Form 4 & Form 5 now available under Nova Scotia

Nova Scotia Forms 1, 2 & 3 now contain the Brokerage Name, Brokerage License Number, Lender Name, Lender License Number, and Lender address.

Form 3-Mortgage Disclosure Statement
(Mortgage Regulation Act, Cost of Borrowing Disclosure Regulations)

Name of Mortgage Lender: Scarlett Test **License Number:** LS1234567A

- 1 Date: Oct 7, 2025
- 2 **Name and address of mortgage lender (“Mortgagee”):**
 Scarlett Test, 11 Testing Address, Ontario, A1A 2B2
- 3 **Name(s) and address(es) of mortgage borrowers(s) (“Mortgagor(s)”):**

Form 3 showcasing the Lender name, license number, and address