



MCAN Home Mortgage Corporation

Broker Portal User Guide

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Overview

1.1 Overview

This document outlines how you as a broker will use the MCAN Home Broker Portal

2.0 User Guide

2.1 Creating an Account

Once you have been approved as a broker to submit to MCAN Home, a Welcome email will be sent with a link to the Broker portal.

Your first step is to **CREATE AN ACCOUNT**

MCAN Home
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New to Broker Portal?
CREATE AN ACCOUNT

Useful Links
[MCAN Financial Group](#)

Broker Login

E-Mail Address

Password

Sign In [Forgot Your Password?](#)

Support

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Already have an account?
SIGN IN

Useful Links
[MCAN Financial Group](#)

Create an account

Name
First
Last

Firm

Phone
+1 (987) 555-1234 ext. 100

E-Mail Address


Password

Confirm Password

Create or Cancel

Support

After clicking the **Create** button, the following message appears



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Thank you

[Support](#)

Your request to create a new account was completed successfully.

You will soon receive an e-mail containing instructions on how to activate your new account.

Your Registration Information

Name : Roker, Mort B

Firm : Get Your Mortgage

Phone : +1 (416) 364-7944

E-Mail : mortbroker@getyourmortgage.com

Next Step


[VERIFY YOUR ACCOUNT](#)

Useful Links

[MCAN Financial Group](#)

You will immediately receive an email requesting you to verify your account.

Clicking the link will bring you to the screen below where you will input your email address and password and click confirm.



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Verify your account

[Support](#)


E-Mail Address
bvasiliou@mcanmortgage.com

Verification ID
a4c99080-c52f-f34f-b2c6-fdf99fe929d3

Password
.....

[Confirm](#) or [Cancel](#)

After the verification process is complete you will receive another email advising you to wait for the lender to confirm your account has been activated. *Please allow up to 2 business days for your account to be activated.*



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Successful Verification

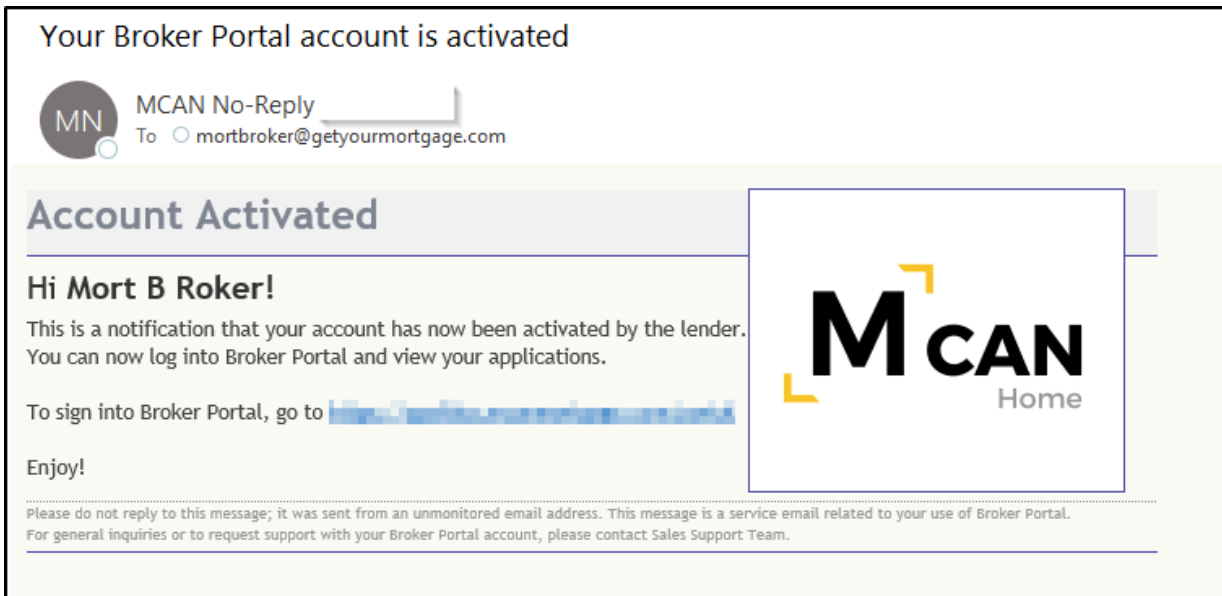
[Support](#)

Thank you for verifying your account.

Next Step

Once you receive an e-mail from the lender confirming your account has been activated, you can sign in [here](#).

You will receive the below email confirmation once your account is activated:



You can now sign into the portal and see the status of your deals as well as upload any documents

2.2 Using the portal


Once you log in to the portal you will arrive at your home page. The Home page will list the deals you have submitted along with their status. Each field can be filtered

The screenshot displays the MCAN Home page interface. On the left is a sidebar with the MCAN Home logo (FSRA 10406), a "Mort Broker" section with "Get Your Home Mortgage" and "PROFILE" / "SIGN OUT" buttons, and "Useful Links" for "MCAN Financial Group". The main content area is titled "Application Search" and includes a "Support" button. Below the title, it shows "Displaying : All applications" with "Refresh" and "Advanced Search" buttons. A table lists three applications:

Applicant	Application #	Amount	Submission Date	Funding Date	Status
Jane Rogers	01300857	\$226,350	Feb 02, 2021	Sep 30, 2021	Approved
James McIntosh	01300850	\$400,000	Nov 11, 2020	Jan 22, 2021	Declined
Roxanne Testmattat	01300728	\$400,000	Mar 27, 2020	Jul 30, 2020	Pending

Below the table, it indicates "Showing Results : 1 to 3 of 3" and "Page : 1".

Clicking on **PROFILE** will show you the contact information that is set up with your account and your Business Development Manager



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Broker Account [Support](#)

[Broker Details](#) [Broker Status](#)

User Details

UserID : bvasiliou@mcanmortgage.com

First Name : Bill Last Name : Vasiliou

Telephone Details

Work : +1 (416) 6202697

Brokerage Information

Name : MCAN Broker Test Firm

License Number :

Address : 1000 - 200 Yorkland Blvd, Toronto, Ontario, Canada M2J 5C6

Business Development Manager

Name : DelliPizzi, Cam


Email Address : cdellipizzi@mcanfinancial.com

Bill Vasiliou
MCAN Broker Test Firm

[PROFILE](#) [SIGN OUT](#)

Useful Links
[MCAN Financial Group](#)

Clicking on Broker Status will show your Broker Status with MCAN Home Mortgage



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Broker Account [Support](#)

[Broker Details](#) [Broker Status](#)

Status


Broker Status : Approved

Mort Broker
Get Your Home Mortgage

[PROFILE](#) [SIGN OUT](#)

Useful Links
[MCAN Financial Group](#)

You will be able to search for any deal you would like to view by using the **Advance Search** feature



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Application Search Support


Displaying : Filtered **Advanced Search** Search or Undo

Applicant : _____

Application # : _____

Amount : \$ _____ to \$ _____

Submission Date: _____ 

Funding Date : _____ 

Status

- All
- Pending
- Approved
- Funded
- Cancelled
- Declined

Applicant	Application #	Amount	Submission Date	Funding Date	Status
Jane Rogers	01300857	\$226,350	Feb 02, 2021	Sep 30, 2021	Approved
James McIntosh	01300850	\$400,000	Nov 11, 2020	Jan 22, 2021	Declined
Roxanne Testmattat	01300728	\$400,000	Mar 27, 2020	Jul 30, 2020	Pending


Showing Results : 1 to 3 of 3 Page : 1

On the home page you can see the deals that are pending (not approved yet by MCAN Home) and approved. Status Declined and Cancelled will also be seen on the home screen

You can click on each of your deals and review the following:

- Applicant, Loan and Property details
- Conditions to be satisfied (once loan is approved)
- Documents uploaded (maximum size is set to 30MB)
- Status of the loan

2.3 Pending Deal



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Mort Broker
Get Your Home Mortgage

PROFILE SIGN OUT

Useful Links
MCAN Financial Group

Application Search

Displaying : Filtered

Advanced Search

Search or Undo

Applicant : _____

Application # : _____

Amount : \$ _____ to \$ _____

Submission Date: _____

Funding Date : _____

Status


- All
- Pending
- Approved
- Funded
- Cancelled
- Declined

Applicant	Application #	Amount	Submission Date	Funding Date	Status
Jane Rogers	01300857	\$226,350	Feb 02, 2021	Sep 30, 2021	Approved
James McIntosh	01300850	\$400,000	Nov 11, 2020	Jan 22, 2021	Declined
Roxanne Testmattat	01300728	\$400,000	Mar 27, 2020	Jul 30, 2020	Pending

Showing Results : 1 to 3 of 3

Page : 1

Clicking on the buttons at the top will bring you to the different tabs



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Mort Broker
Get Your Home Mortgage

PROFILE SIGN OUT

Useful Links
MCAN Financial Group

01300728 / Pending

Support

< Loan and Property Conditions Documents Status

Applicants


Name (Last, First)	Role
Testmattat, Roxanne	Loan Client
Testsiars, Theresa	Loan Client

Loan Details

Purpose of Loan	: House Purchase	Request Loan Amount	: \$400,000
Charge	: First Mortgage	Insurance Premium	: \$0
Mortgage Term	: 1 year fixed	Total Loan Amount	: \$400,000
Amortization Period	: 25 years	Funding Date	: Jul 30, 2020
Net Rate	: 6.09 %	First Payment Date	: Sep 01, 2020
Payment	: \$2580.66 monthly		

Property

Address : 1245 Elm Street Acres N, Montreal, Quebec, Canada G1B0A2



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01300728 / Pending

Support

<
Loan and Property
Conditions
Documents
Status

Applicants

Name (Last, First)	Role
Testmattat, Roxanne	Loan Client
Testsiars, Theresa	Loan Client


Conditions

Responsible Party Broker ▼

Condition Number	Description	Responsibility	Status
No conditions found			

Useful Links

[MCAN Financial Group](#)



FSRA 10406

01300728 / Pending

Support

<
Loan and Property
Conditions
Documents
Status

Applicants

Name (Last, First)	Role
Testmattat, Roxanne	Loan Client
Testsiars, Theresa	Loan Client


Documents

Upload Multiple
Upload

Name	Upload Date	Type	Review Status
No documents found			

Useful Links

[MCAN Financial Group](#)



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01300728 / Pending

Support

<
Loan and Property
Conditions
Documents
Status

Applicants

Name (Last, First)	Role
Testmattat, Roxanne	Loan Client
Testsiars, Theresa	Loan Client

Application Team

Name (Last, First)	Email	Role

Status History

Activity	Completed On	Status
Application in Review		Application Under Review
Application Received		Application Received

Useful Links

[MCAN Financial Group](#)

2.4 Approved Deal

Click to open the approved deal and view more details surrounding the deal.



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Mort Broker
Get Your Home Mortgage
[PROFILE](#) [SIGN OUT](#)

Useful Links
[MCAN Financial Group](#)


Application Search

Support

Displaying : All applications [Refresh](#) [Advanced Search](#)

Applicant	Application #	Amount	Submission Date	Funding Date	Status
Jane Rogers	01300857	\$226,350	Feb 02, 2021	Sep 30, 2021	Approved
James McIntosh	01300850	\$400,000	Nov 11, 2020	Jan 22, 2021	Declined
Roxanne Testmattat	01300728	\$400,000	Mar 27, 2020	Jul 30, 2020	Pending

Showing Results : 1 to 3 of 3 Page : 1



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Mort Broker
Get Your Home Mortgage
[PROFILE](#) [SIGN OUT](#)

Useful Links
[MCAN Financial Group](#)

01300857 / Approved

Support

« [Loan and Property](#) [Conditions](#) [Documents](#) [Status](#)

Applicants

Name (Last, First)	Role
Rogers, Jane	Loan Client


Loan Details

Purpose of Loan	: Refinance	Request Loan Amount	: \$225,000
Charge	: First Mortgage	Insurance Premium	: \$1,350
Mortgage Term	: 5 years fixed	Total Loan Amount	: \$226,350
Amortization Period	: 25 years	Funding Date	: Sep 30, 2021
Net Rate	: 2.34 %	First Payment Date	: Nov 01, 2021
Payment	: \$996.02 monthly		

Property

Address : 32 Brock drive, Brampton, Ontario, Canada L6P 1A1

You can sort conditions by responsible party. To see all condition statuses that are relevant to yourself sort by "Broker"



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[Support](#)

Loan and Property
Conditions
Documents
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Applicants

Name (Last, First)	Role
Rogers, Jane	Loan Client


Conditions

Condition Number	Description	Responsibility	Status	Responsible Party
2003	Provincial Mortgage Broker Disclosure	Broker	Under Review	Broker
2008	Signed Mortgage Application	Broker	Accepted	Broker
2061	Property Taxes - Applies to all Refinances	Broker	Unacceptable	Broker
2064	Identification	Broker	Required	Broker
2072	Long Closing Clause - Interest Rate Set Date	Broker	Waived	Broker
2098	Signed Commitment	Broker	Required	Broker

Each condition listed will have one of the following statuses assigned to it:

- Accepted
- Waived
- Revised
- Unacceptable
- Required

Clicking on each condition name will show the full condition details at the bottom of the screen



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01300857 / Approved

[Support](#)

Loan and Property
Conditions
Documents
Status

Applicants


Name (Last, First)	Role
Rogers, Jane	Loan Client

Conditions

Condition Number	Description	Responsibility	Status	Responsible Party
2003	Provincial Mortgage Broker Disclosure	Broker	Under Review	Broker
2008	Signed Mortgage Application	Broker	Accepted	Broker
2061	Property Taxes - Applies to all Refinances	Broker	Unacceptable	Broker
2064	Identification	Broker	Required	Broker
2072	Long Closing Clause - Interest Rate Set Date	Broker	Waived	Broker
2098	Signed Commitment	Broker	Required	Broker

Details

M CAN Home requires a copy of the Mortgage Broker's signed or initialed mortgage application. NOTE: The mortgage application must be signed or initialed separately from the signed consent.



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Support

« Loan and Property
Conditions
Documents
Status

Applicants

Name (Last, First)	Role
Rogers, Jane	Loan Client


Documents

Upload Multiple
Upload

Name	Upload Date	Type	Review Status
Gift Letter.pdf	Mar 31, 2022 12:02 PM	Down Payment	Received - To be reviewed
Commitment Letter.pdf	Mar 15, 2022 3:21 PM	Commitment and Disclosure	
Commitment Letter.pdf	Mar 15, 2022 10:12 AM	Commitment and Disclosure	
Signed Disclosure		Commitment and Disclosure	Accepted <input checked="" type="checkbox"/>
Signed Commitment		Commitment and Disclosure	Accepted <input checked="" type="checkbox"/>
Property Tax		Subject Property	Waived <input type="checkbox"/>
Pay Stub_For_Test Ingestion1		Income	Alternate Document Required
Employment Letter_For_Test Ingestion1		Income	Pending Further Documentation

Refer to Section 3.0 to learn more about Document uploading

Clicking the Status tab will display the Application Team (Underwriter and Fulfillment Officer) who are working on your application. Also where the application sits within the lifecycle of the mortgage.



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Support

« Loan and Property
Conditions
Documents
Status

Applicants

Name (Last, First)	Role
Rogers, Jane	Loan Client

Application Team

Name (Last, First)	Email	Role
UnderWriter, Olga	olga@mcanfinancial.com	Underwriter
Officer, Mortgage	mfo@mcanfinancial.com	Fulfillment Officer

Status History

Activity	Completed On	Status
Application in Review	Feb 02, 2021 1:09 PM	Application under reviewed
Application Received	Feb 02, 2021 1:09 PM	Application Review Pending
Pending Decision	Feb 02, 2021 1:12 PM	Not Applicable
Application Decision	Feb 02, 2021 1:57 PM	Application Review Complete
Commitment Signback		Pending Commitment Sign back and supporting Docs
Proceed to Follow up Stage		Approved Conditions not met
Produce Commitment	Mar 15, 2022 10:12 AM	Approved Commitment Issued; Conditions not met
Document Review Complete	Mar 15, 2022 10:13 AM	Broker Complete
Quality Control Complete	Feb 02, 2021 1:58 PM	Quality Control review complete
Rework	Mar 15, 2022 9:55 AM	Application Rework Complete

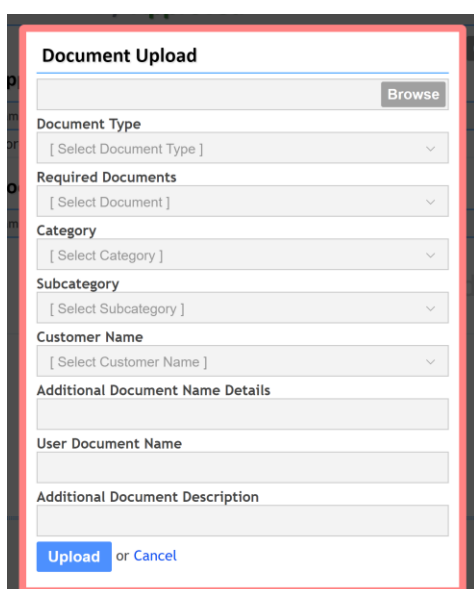
2.5 Funded Deals

You will be able to view any deals funded for the previous 12 months

3.0 Document Uploading

3.1 How to upload a document

You can locate and upload files from your computer individually. Once a deal has been submitted you can immediately start uploading documents. Clicking on the **Upload** button will allow the broker to upload any document saved in their files



The screenshot shows a 'Document Upload' form with the following fields and controls:

- A file selection area with a 'Browse' button.
- 'Document Type' dropdown menu: [Select Document Type]
- 'Required Documents' dropdown menu: [Select Document]
- 'Category' dropdown menu: [Select Category]
- 'Subcategory' dropdown menu: [Select Subcategory]
- 'Customer Name' dropdown menu: [Select Customer Name]
- 'Additional Document Name Details' text input field.
- 'User Document Name' text input field.
- 'Additional Document Description' text input field.
- 'Upload' button and 'Cancel' link at the bottom.

You will need to choose the Document Type from a drop-down list and the Category Type.

- ✓ Drop downs will allow you to indicate which borrower the document is for.
- ✓ You will also be able to add any notes in the Additional Document Description.
- ✓ The portal will automatically save the document in the approved naming format.

Document Upload

Doc for testing Browse

Document Type
Income ←

Required Documents
Employment Letter_For_Christopher Flores (Pending Further ←

Category
Employment Letter

Subcategory
For

Customer Name
Christopher Flores

Additional Document Name Details

User Document Name
Employment Letter_For_Christopher Flores

Additional Document Description
TEST ←

Upload or Cancel

Note: Uploading a "Condition Package" with multiple documents merged together is not eligible for the Perfect Package

3.2 Document types and Categories:

- Commitment and Disclosure
 - Other
 - Signed Application and Consent
 - Signed Commitment
 - Signed Disclosure

- Income
 - Accountant Prepared Financial Statements
 - Audited Financial Statements
 - Bank Statements
 - Business Ownership
 - Commission/Billing Statement
 - Contract
 - Employment Letter
 - NOA
 - Other
 - Paystub
 - T4
 - T4A/T5
 - Tax Return
 - Tenant Agreement/Acknowledgment letter

- Rental Income
 - Bank Statements
 - Lease Agreement
 - Lease/Tenant Acknowledgment
 - Market Rent Report

- Down payment

- Account Ownership
- Bank Statements
- Deposit
- Discharge/Mortgage Statement
- Draft
- Gift Letter
- Investments
- Mortgage Statements
- Other
- RRSP
- Sales Agreement
- Tenant Agreement/Acknowledgment letter
- Trust Ledger

- Divorce Separation Agreement
 - Divorce Agreement
 - Separation Agreement

- ID
 - Other
 - Personal ID
 - Residential ID

- Void Cheque/PAD Form
 - PAD form
 - Void Cheque
- Bankruptcy or CP Documents

- Subject Property
 - AVM
 - Appraisal
 - CMA
 - Comparable
 - Condo Documents
 - Drive by
 - Google Map
 - Mortgage Statement
 - PSA or MLS
 - Portability Certificate
 - Property Tax
 - Purchase Agreement

- Credit-Liabilities
 - Bank Statements
 - Creditor Contact Information
 - Installment Loan Payment
 - Landlord Contact Information

- Non-Subject Property Documents
 - Condo Fees
 - Market Rent Report
 - Mortgage Statement

- Property Tax
- Other
 - External
 - Internal
 - Verifications

3.3 Multiple Document upload

To upload multiple documents at one time, you can locate and upload the combined document file from your computer.

Once a deal has been submitted you can immediately start uploading documents. Clicking on the **Upload Multiple** button will allow the you to upload up to 10 documents at a time

Drag and Drop up to 10 files at a time to the Multiple Documents Upload window once it opens. Enter a description or note for each document and click Upload

Files Added:	Additional Description:
Gift Letter.pdf	
Income Document.pdf	
Pay Stub.pdf	

Upload Cancel

NOTE: Please ensure that the file names are accurate for the document you are uploading

3.4 Reviewing uploaded & required documents

Go to the "Documents" tab to access all documents & view requirements

01300857 / Approved Support

Applicants

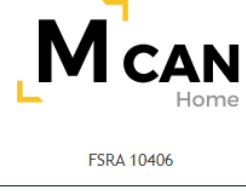
Name (Last, First)	Role
Rogers, Jane	Loan Client

Documents Upload Multiple Upload

Name	Upload Date	Type	Review Status	
Gift Letter.pdf	Mar 31, 2022 12:02 PM	Down Payment	Received - To be reviewed	
Commitment Letter.pdf	Mar 15, 2022 3:21 PM	Committment and Disclosure		
Commitment Letter.pdf	Mar 15, 2022 10:12 AM	Committment and Disclosure		
Signed Disclosure		Committment and Disclosure	Accepted	<input checked="" type="checkbox"/>
Signed Commitment		Committment and Disclosure	Accepted	<input checked="" type="checkbox"/>
Property Tax		Subject Property	Waived	<input type="checkbox"/>
Pay Stub_For_Test Ingestion1		Income	Alternate Document Required	
Employment Letter_For_Test Ingestion1		Income	Pending Further Documentation	

Under the documents tab you will see a document name with a reviewer status:

Pending Further Documentation: Please uploaded the appropriate required document



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01300857 / Approved

Loan and Property
Conditions
Documents
Status

Support

Applicants

Name (Last, First)	Role
Rogers, Jane	Loan Client

Documents

Upload Multiple
Upload


Name	Upload Date	Type	Review Status
Gift Letter.pdf	Mar 31, 2022 12:02 PM	Down Payment	Received - To be reviewed 📄
Commitment Letter.pdf	Mar 15, 2022 3:21 PM	Commitment and Disclosure	📄
Commitment Letter.pdf	Mar 15, 2022 10:12 AM	Commitment and Disclosure	📄
Signed Disclosure		Commitment and Disclosure	Accepted ✔️
Signed Commitment		Commitment and Disclosure	Accepted ✔️
Property Tax		Subject Property	Waived 🚫
Pay Stub_For_Test Ingestion1		Income	Pending Further Documentation 📄
Employment Letter_For_Test Ingestion1		Income	Pending Further Documentation 📄

Underwriting Comments: Letter does not state the start date ➔

Accepted: No further action required
 Waived: Not required for this deal

4.0 Support

You can find the support button in the top right-hand corner.
 Click the support button to access the support contact information.



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Application Search

Displaying : All applications

Refresh
Advanced Search

Support
➔

Applicant	Application # ▼	Amount	Submission Date	Funding Date	Status
Jane Rogers	01300857	\$226,350	Feb 02, 2021	Sep 30, 2021	Approved
James McIntosh	01300850	\$400,000	Nov 11, 2020	Jan 22, 2021	Declined
Roxanne Testmattat	01300728	\$400,000	Mar 27, 2020	Jul 30, 2020	Pending

Showing Results : 1 to 3 of 3
Page : 1

Mort Broker

Get Your Home Mortgage

PROFILE
SIGN OUT

Useful Links

[MCAN Financial Group](#)

Application Search Support

Do you need help? Close

Please contact Sales Support Team:

- E-mail: portalsupport@mcanfinancial.com

Our business hours are **Monday to Friday, 9am to 5pm EST** or contact your Business Development Manager.

Advanced Search

Date	Status
21	Approved
21	Declined
20	Pending

Showing Results : 1 to 3 of 3 Page : 1

Mort Broker
Get Your Home Mortgage

[PROFILE](#) [SIGN OUT](#)

Useful Links
[MCAN Financial Group](#)

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Please contact support if you are having any difficulties using the portal.
Support Contact email: portalsupport@mcanfinancial.com