

# Condo Project Advisor

March 2023 Release Notes

## Overview

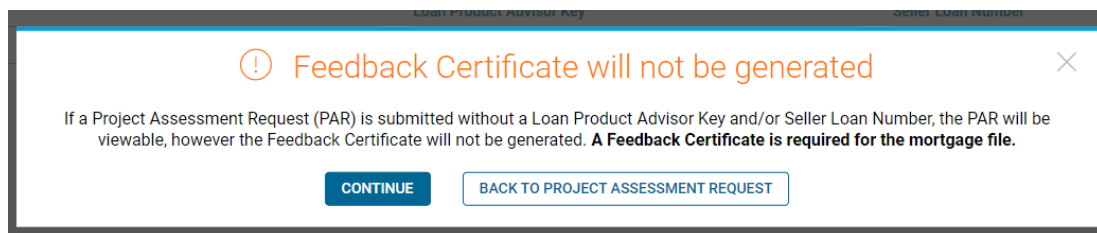
The March 17, 2023, Condo Project Advisor® release includes user interface (UI) updates and enhancements to both the project waiver request (PWR) and project assessment request (PAR) exports that make using the tool and reviewing your submissions easier. Here's what's new:

## UI Updates

- The following updates are being made to the Project Assessment Request and PAR Results Summary pages:
  - **New look and feel** – The Project Assessment Request page design is updated to provide a smoother experience through the PAR submission process.

The screenshot shows the 'Project Assessment Request' form. At the top, there are navigation tabs: 'PROJECT ASSESSMENT REQUEST', 'NEW WAIVER REQUEST', and 'OTHER LINKS'. Below the tabs, there are 'CANCEL' and 'SUBMIT' buttons. The form is titled 'Project Details' and includes a red asterisk indicating a required field. A message states: 'Please provide a Loan Product Advisor Key or Seller Loan Number (retail mortgages only), to receive a Condo Project Advisor Feedback Certificate required for the mortgage file. If a Project Assessment Request is submitted without a Loan Product Advisor Key or Seller Loan Number, the Project Assessment will be viewable, however the Condo Project Advisor Feedback Certificate will not be generated.' The form fields include: ZIP (22314), City (ALEXANDRIA), State (VA), Project Name (with a dropdown arrow), Street Name (with a dropdown arrow), Loan Product Advisor Key (with a 'Type here...' prompt), and Seller Loan Number (with a 'Type here...' prompt).

- **Feedback certificate not generated pop-up** – If you submit a PAR without the Loan Product Advisor® (LPA<sup>SM</sup>) Key or Seller Loan Number, you'll receive a reminder that a Condo Project Advisor Feedback Certificate wasn't generated because it can't be generated without those inputs.



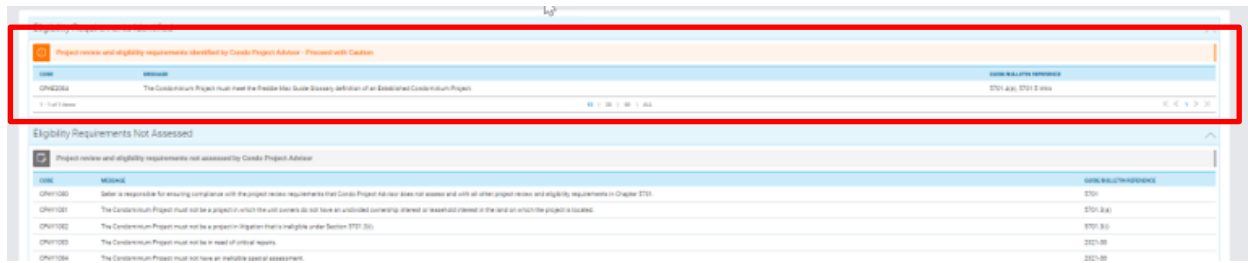
- **Export button added** – Easily export results by clicking the blue download icon on the top right of the page.

The screenshot shows the 'Results Summary' page. It features a table with the following data:

PROJECT ASSESSMENT RESULTS	PROJECT NAME	PROJECT ADDRESS	UNIT COUNT	FEEDBACK CERTIFICATE
INCOMPLETE ASSESSMENT	ALEXANDRIA HOUSE	MADISON ST, ALEXANDRIA, VA 22314	200	YES
PROJECT ID: 120604	PAR NUMBER: PAR10001304	LOAN PRODUCT ADVISOR KEY: 76576576	SELLER LOAN NUMBER: -	

At the bottom of the table, it says 'Eligibility Requirements Not Assessed'. A blue download icon is visible in the top right corner of the page.

- **Most pivotal assessment messages front and center** – When a PAR is submitted and a project receives a Yellow assessment, the *Eligibility Requirements Identified* assessment messages now appear above the *Eligibility Requirements Not Assessed* messages.



- **Collapsible accordions for assessment messages** – You can roll up displayed messages in both the *Eligibility Requirements Identified* and *Eligibility Requirements Not Assessed* headers to reduce on-page scrolling.
- Additionally, we updated the links in the notifications (bell icon found in the top right of the header bar in the tool). So, when you click the links, you're taken straight to the details page for your PWR.

## PWR Pipeline Details Export Updates

- Blank fields will no longer be counted in the export so you can run pivot tables and review analytics more easily (e.g., How many PWRs you submitted under the Leased Amenities exception category).

## PAR Export Updates

- Blank fields will no longer be counted in the export so you can run pivot tables and review analytics more easily (e.g., How many of your PAR submissions included LPA Keys).
- The export now includes a Y/N for whether a feedback certificate was generated for a specific PAR submission. This provides another way for you to sort the export and more easily identify PARs that already have feedback certificates.