


Path Preliminary Release Notes

April 2026

This Path release is scheduled for production release on April 19th, 2026, including the following feature updates and enhancements. The actual feature updates and enhancements are subject to change based on testing, development, and other factors that occur before the release date.

Note: New features and screen components are indicated in **bold**. Existing features and screen components are indicated in *italics*.

Note: IFR (items for review) IDs are displayed at the beginning of items where applicable. Bugfixes are indicated by .

Change Version

Since the last version (4/13/26), the following items have been added/removed/updated.

IFR	Added/Removed/Updated	Page(s)
45344	Added	30-33
51311	Edited	19-20

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Enhancements

Configurations

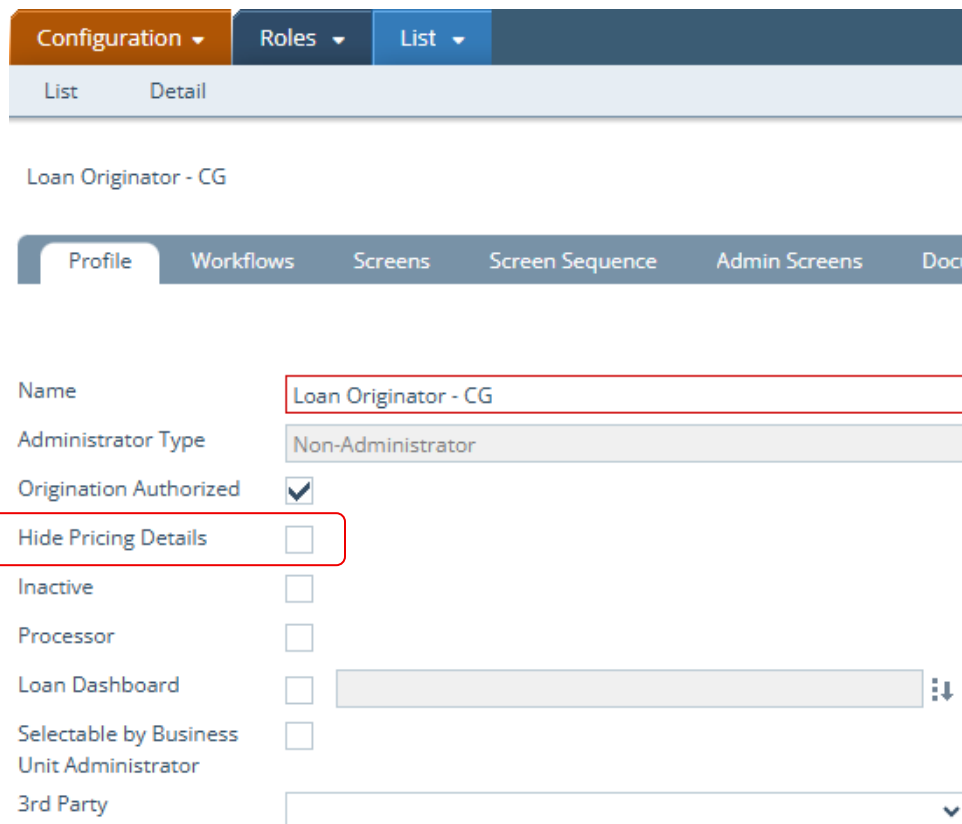
Roles

Profile Tab

Hide Pricing Details (48986)

What's New

- ✓ Added the new **Hide Pricing Details** checkbox that lets administrators control a role's access to pricing information.



The screenshot shows the 'Roles' configuration page in Path Calyx. The breadcrumb trail is 'Configuration > Roles > List'. The role being edited is 'Loan Originator - CG'. The 'Profile' tab is selected. The 'Hide Pricing Details' checkbox is highlighted with a red box and is currently unchecked. Other visible fields include 'Name' (Loan Originator - CG), 'Administrator Type' (Non-Administrator), 'Origination Authorized' (checked), 'Inactive', 'Processor', 'Loan Dashboard', 'Selectable by Business', 'Unit Administrator', and '3rd Party'.

Purpose and Usage

- Restrict pricing access—select **Hide Pricing Details** for a role to prevent users in that role from viewing and editing pricing details.

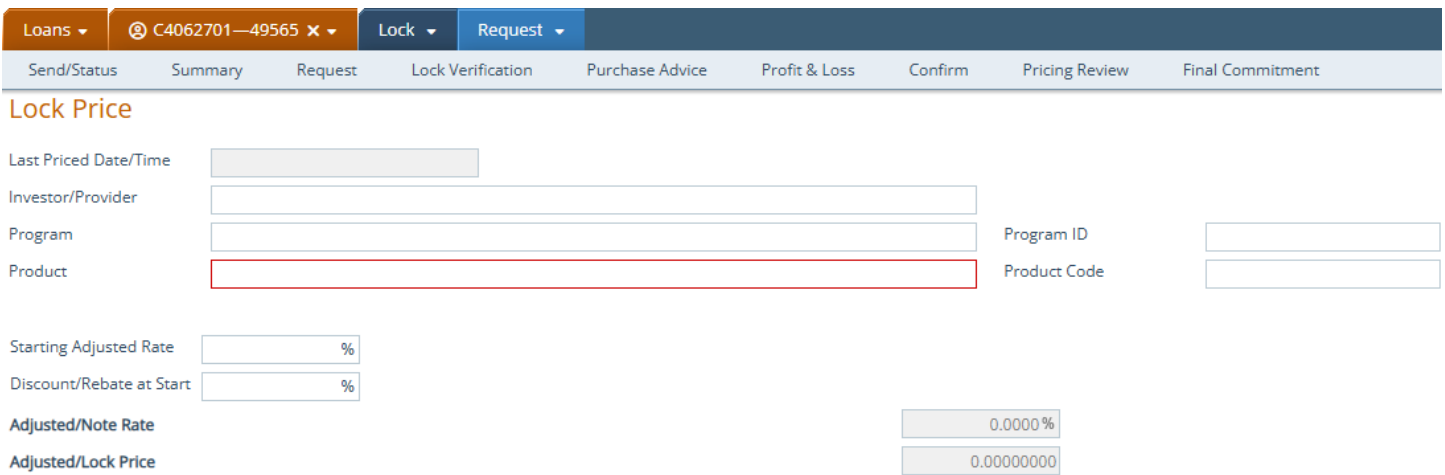
- Allow full access—leave the checkbox cleared to let the role view and edit all pricing details.

Why This Helps

- Previously, to keep pricing information out of view, admins often had to disable entire screens/tabs—blocking access to non-pricing data on those pages. With **Hide Pricing Details**, admins can keep those screens/tabs available while hiding only the pricing details, so users can still work with all other loan information shown there.

Impacted Sections in Loans

- *Lock > Request* screen
 - Most of the sections and fields are unimpacted. The impacted section is *Lock Price*, which looks like the below image when the **Hide Pricing Details** box is checked for this role.



- The hidden fields are:
 - *Group*
 - *Group ID*
 - *Investor/Provider ID*
 - *Base Rate*
 - *Rate Adjustments*
 - *Base Price*
 - *Price Adjustments (Not Subject to Caps)*
 - *Price Adjustments (Subject to Caps)*
 - *Adjustment Cap*
 - *Max Price*
- *Production > Quote > General* tab
 - Most of the sections and fields are unimpacted. The impacted section is *Programs & Pricing*, which looks like the image below when the **Hide Pricing Details** box is checked for this role.

Loans ▾ C4062701—49565 ✕ ▾ Production ▾ Quote ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs Loan Transmittal FHA VA Quote ▾

General Loan Comparison

Programs & Pricing

Request Information

Lock Period Documentation Program Type

Product Type

Broker Comp Paid By

Response Information

Last Priced Date/Time

Investor/Provider Program ID

Program Product Code

Product ARM Product Number

ARM Product

Starting Adjusted Rate %

Discount/Rebate at Start %

Adjusted/Note Rate 0.0000 %

Adjusted Price 0.00000000

- The hidden fields are:
 - *Group*
 - *Group ID*
 - *Investor/Provider ID*
 - *Base Rate*
 - *Rate Adjustments*
 - *Base Price*
 - *Price Adjustments (Not Subject to Caps)*
 - *Price Adjustments (Subject to Caps)*
 - *Adjustment Cap*
 - *Max Price*
- *Production > Product & Pricing* screen
 - Most of the sections and fields are unimpacted. The impacted section is *Product Information*, which looks like the image below when the **Hide Pricing Details** box is checked for this role.

Loans ▾ C4062701—49565 ✕ ▾ Production ▾ Product & Pricing ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs Loan Transmittal FHA VA Quote ▾

Product Information

Request Information

Lock Period

Product Type

Broker Comp Paid By

Documentation Program Type

Anticipated Gross Rent \$

Debt-Service Coverage Ratio

Response Information

Last Priced Date/Time

Investor/Provider

Program

Product

ARM Program Name

Program ID

Product Code

ARM Program Number

Starting Adjusted Rate

Discount/Rebate at Start

Adjusted/Note Rate

Adjusted Price

- The hidden fields are:
 - *Group*
 - *Group ID*
 - *Investor/Provider ID*
 - *Base Rate*
 - *Rate Adjustments*
 - *Base Price*
 - *Price Adjustments (Not Subject to Caps)*
 - *Price Adjustments (Subject to Caps)*
 - *Adjustment Cap*
 - *Max Price*

Unimpacted Sections in Loans

- Roles with the **Hide Pricing Details** box checked can still access to pricing information regarding the loan’s program, product, investor, and adjusted price/rate.

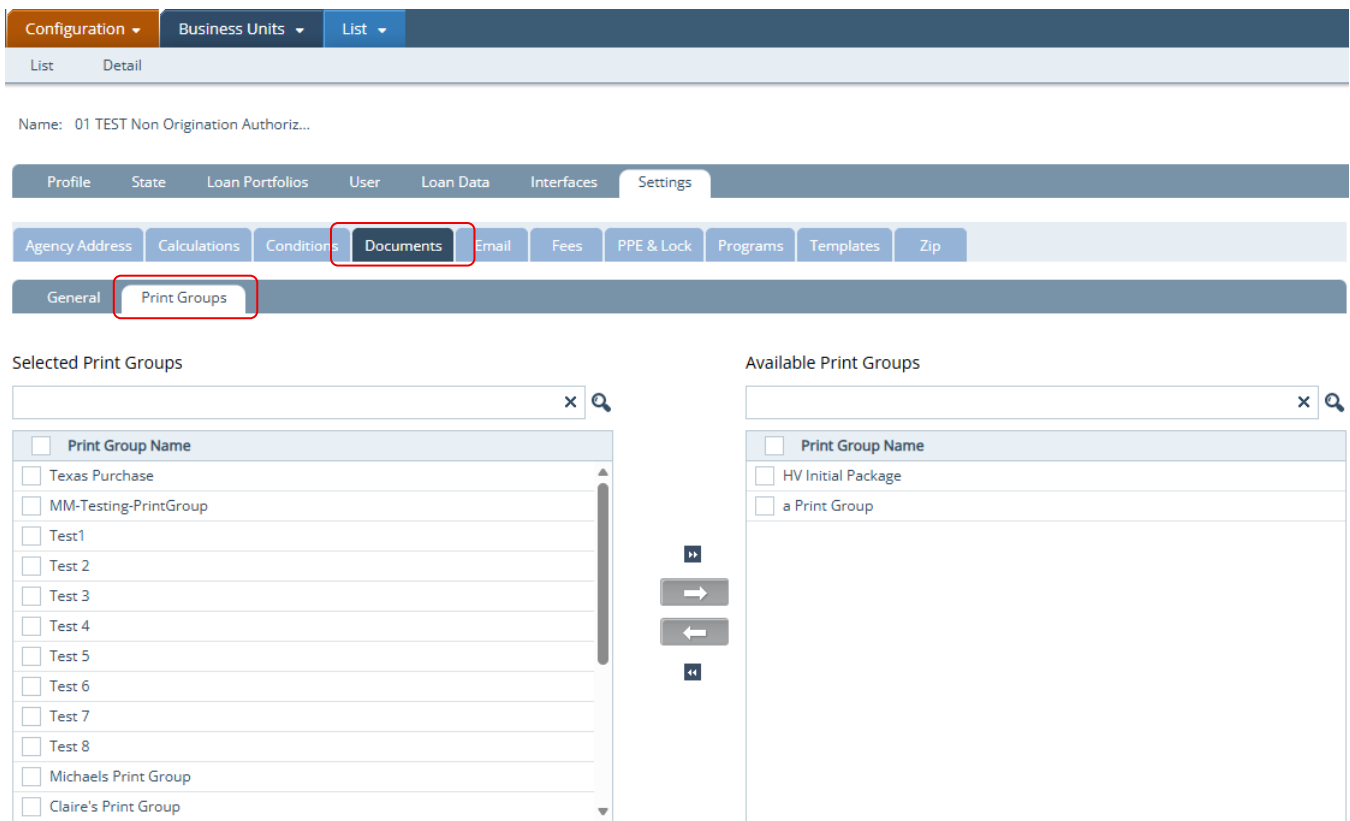
Business Units

Settings Tabs

Multiple Enhancements (51677)

What's Enhanced

- ✓ Enhanced the functionality of the *Business Units > Settings* tab by allowing administrators to configure and control a business unit's access to a suite of new functionalities, such as:
 - Document **Print Groups** – corresponding to *Settings > Documents > Print Groups*



The screenshot displays the 'Business Units > Settings' configuration page. The 'Documents' tab is selected, and the 'Print Groups' sub-tab is active. The interface is divided into two main sections: 'Selected Print Groups' and 'Available Print Groups'. The 'Selected Print Groups' list contains the following items:

- Print Group Name
- Texas Purchase
- MM-Testing-PrintGroup
- Test1
- Test 2
- Test 3
- Test 4
- Test 5
- Test 6
- Test 7
- Test 8
- Michaels Print Group
- Claire's Print Group

The 'Available Print Groups' list contains the following items:

- Print Group Name
- HV Initial Package
- a Print Group

Navigation arrows are visible between the two lists, allowing for moving items from available to selected and vice versa.

- Condition **Collections** – corresponding to *Settings > Conditions > Collections*

Profile State Loan Portfolios User Loan Data Interfaces **Settings**

Agency Address Calculations **Conditions** Documents Email Fees PPE & Lock Programs Templates Zip

Collection

Selected Condition Collections

<input type="checkbox"/>	Collection Name
<input type="checkbox"/>	Condition Collection 1
<input type="checkbox"/>	Condition Collection 2
<input type="checkbox"/>	Copy of Condition Collection 2
<input type="checkbox"/>	Condition Collection 4
<input type="checkbox"/>	new collection 11_7
<input type="checkbox"/>	HV Cond Collection
<input type="checkbox"/>	test_0307

Available Condition Collections

<input type="checkbox"/>	Collection Name
<input type="checkbox"/>	collection four
<input type="checkbox"/>	test cond 5
<input type="checkbox"/>	collet 11_6
<input type="checkbox"/>	new collection 11_6
<input type="checkbox"/>	Shibani Condition Collection

- **Fee Templates** – corresponding to *Settings > Fees > Templates*

Profile State Loan Portfolios User Loan Data Interfaces **Settings**

Agency Address Calculations Conditions Documents Email **Fees** PPE & Lock Programs Templates Zip

Templates

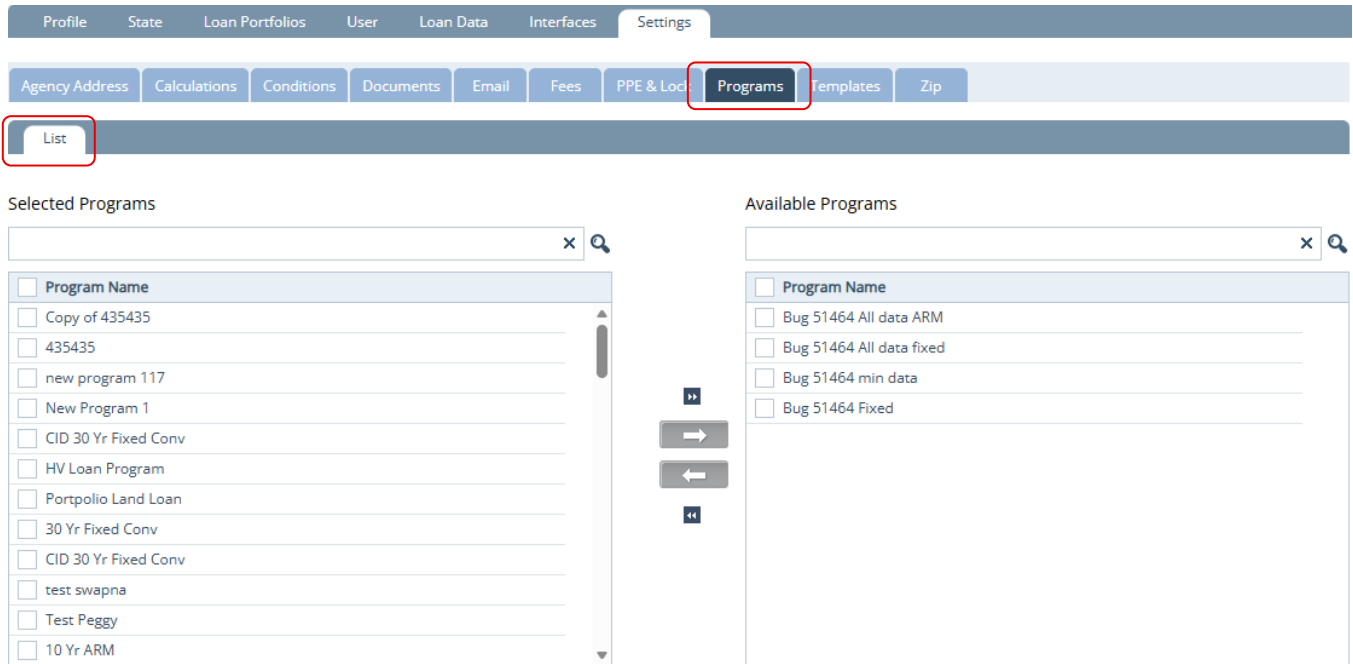
Selected Fee Templates

<input type="checkbox"/>	Fee Template Name
<input type="checkbox"/>	TRID Template - James
<input type="checkbox"/>	Bug 38361
<input type="checkbox"/>	fee test
<input type="checkbox"/>	Bug 45172 - Mortgage Now:Templates add data field Prepaid Interest Num...
<input type="checkbox"/>	SHIBANI- Tolerance Test
<input type="checkbox"/>	New Fees Template - 2nd Lien Const Modular
<input type="checkbox"/>	Fee template 12_27_2023
<input type="checkbox"/>	1st fee temp
<input type="checkbox"/>	1f fee Template
<input type="checkbox"/>	1 new Fee Temp 65
<input type="checkbox"/>	New Fee Temp 11
<input type="checkbox"/>	AnnualCalculationIndicator

Available Fee Templates

<input type="checkbox"/>	Fee Template Name
<input type="checkbox"/>	Copy of TRID for Lee
<input type="checkbox"/>	Hoan Origination Fees (Test)
<input type="checkbox"/>	Hoan Origination Fees
<input type="checkbox"/>	IDS fees
<input type="checkbox"/>	Friday Test
<input type="checkbox"/>	Closing Costs - James
<input type="checkbox"/>	Daniel Test Template
<input type="checkbox"/>	Populate Hard Coded Fees
<input type="checkbox"/>	AI Fees Template 6/23/17
<input type="checkbox"/>	TRID PG2 No warning
<input type="checkbox"/>	dddd
<input type="checkbox"/>	TRID Peg test 4

- **Loan Programs** – corresponding to *Settings > Programs*



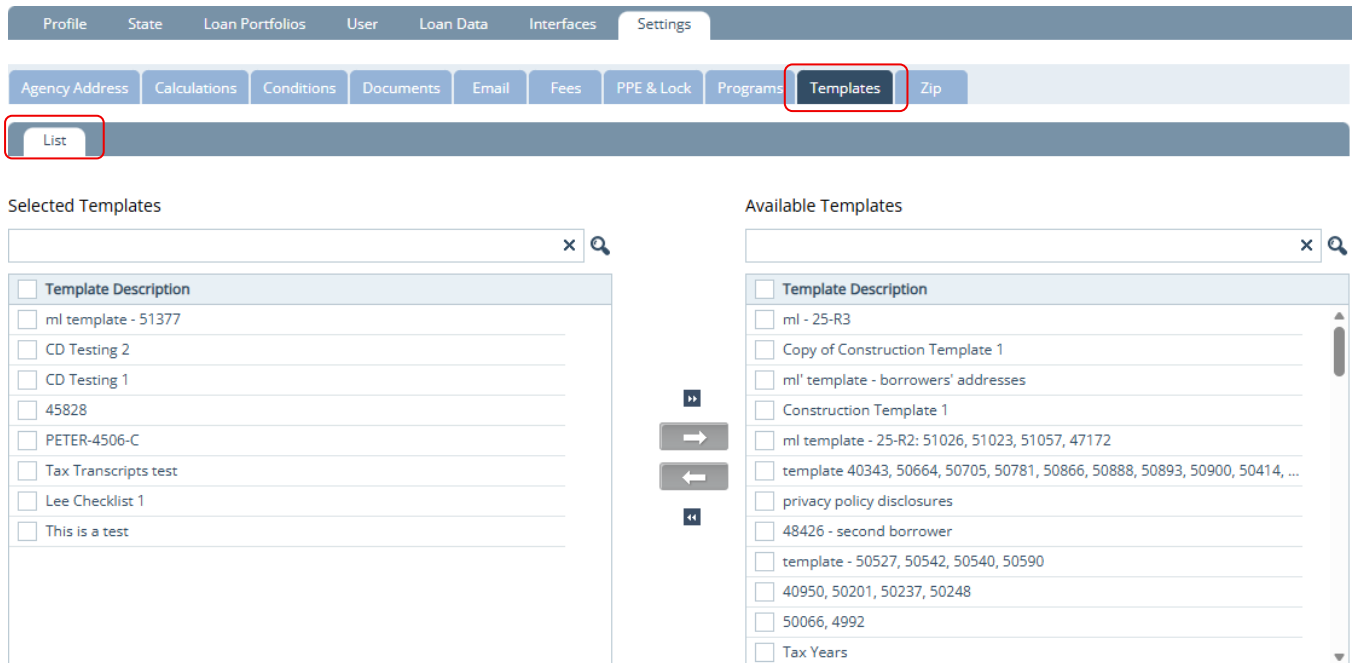
Selected Programs

- Copy of 435435
- 435435
- new program 117
- New Program 1
- CID 30 Yr Fixed Conv
- HV Loan Program
- Portpolio Land Loan
- 30 Yr Fixed Conv
- CID 30 Yr Fixed Conv
- test swapna
- Test Peggy
- 10 Yr ARM

Available Programs

- Bug 51464 All data ARM
- Bug 51464 All data fixed
- Bug 51464 min data
- Bug 51464 Fixed

– **Loan Templates** – corresponding to *Settings > Templates*



Selected Templates

- ml template - 51377
- CD Testing 2
- CD Testing 1
- 45828
- PETER-4506-C
- Tax Transcripts test
- Lee Checklist 1
- This is a test

Available Templates

- ml - 25-R3
- Copy of Construction Template 1
- ml' template - borrowers' addresses
- Construction Template 1
- ml template - 25-R2: 51026, 51023, 51057, 47172
- template 40343, 50664, 50705, 50781, 50866, 50888, 50893, 50900, 50414, ...
- privacy policy disclosures
- 48426 - second borrower
- template - 50527, 50542, 50540, 50590
- 40950, 50201, 50237, 50248
- 50066, 4992
- Tax Years

Purpose

- To configure these features per business unit without affecting other business units.
- To save time by managing access in one place (no need to navigate to multiple screens in *Settings*).
- Delegate – to allow lower-level administrators who do not have access to *Settings* to add these features to a business unit.

Scope

- The administrator can add/remove which document **Print Groups**, condition **Collections**, fee **Templates**, loan **Programs**, and loan **Templates** are available to that business unit.
- The configuration of these features only apply to the selected business unit.
 - For example, the **Print Groups** subtab lets you choose which print groups are available to the business unit for use. It does not let you create, modify, or delete print groups.

Limitations

- You cannot create, edit, or delete:
 - Document **Print Groups** (do this in *Settings > Documents > Print Groups*)
 - Condition **Collections** (do this in *Settings > Conditions > Collections*)
 - Fee **Templates** (do this in *Settings > Fees > Templates*)
 - Loan **Programs** (do this in *Settings > Programs*)
 - Loan **Templates** (do this in *Settings > Templates*)
- This enhancement controls access/assignment only—not full management of the underlying items.

Usage

- Go to *Configuration > Business Units* and open the target business unit
- Select the *Settings* tab
- Open the relevant subtab
- Select which items should be available to this business unit
- Save

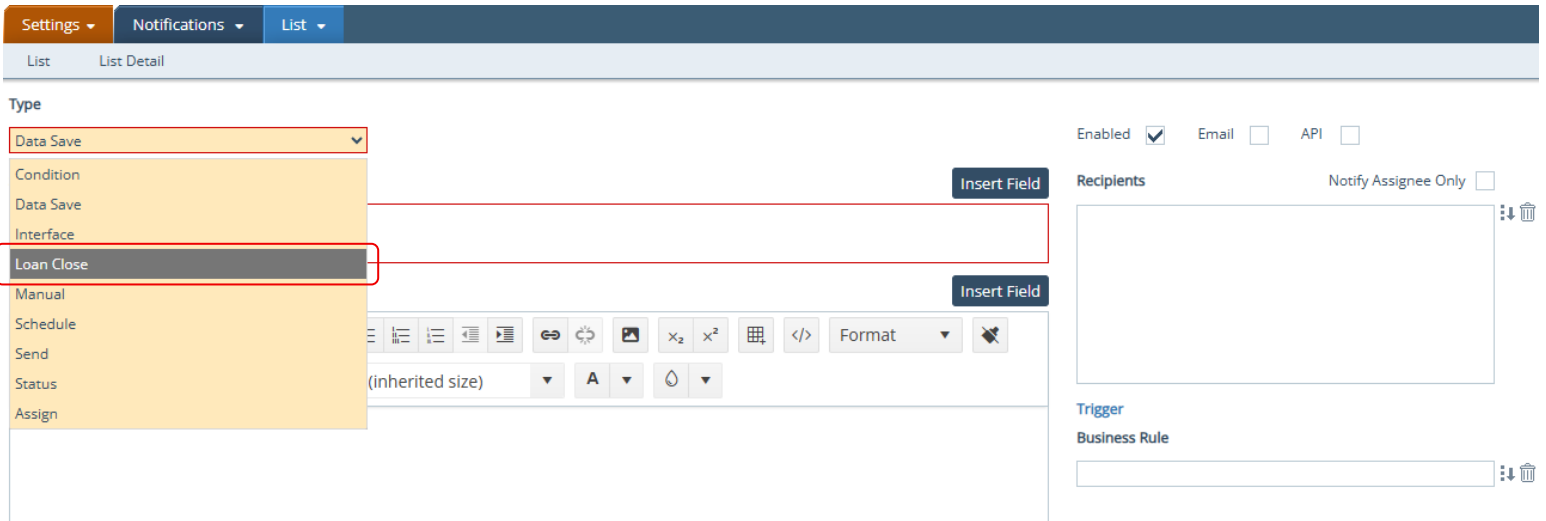
Settings

Notifications

[New Loan Close Notification \(51311\)](#)

What's New

- ✓ Added the **Loan Close** notification type.

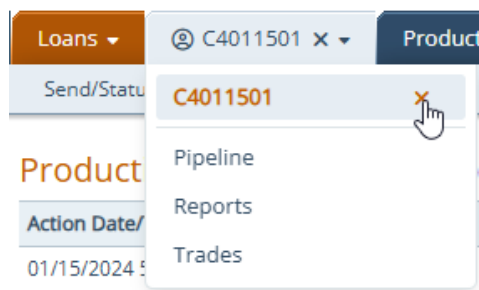


Purpose and Usage

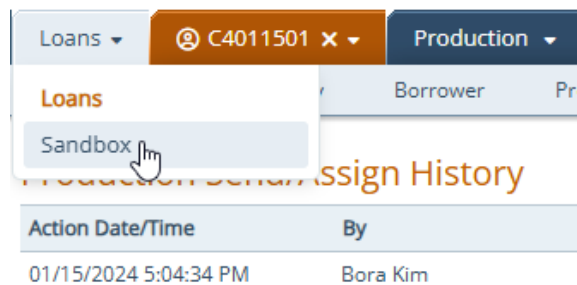
- Select **Loan Close** to notify recipients when the loan has been closed.

Definition of Loan Close

- When the user click X to exit the loan



- When the user leave *Loans*



- Such as when the user goes to *Sandbox*, or if you are an administrator, *Settings* or *Configuration*
- When the user logs out of Path
- When the user changes roles

Data Fields

New Data Fields Screen: Control Dropdown Options Shown in Loans (45748)

What's New

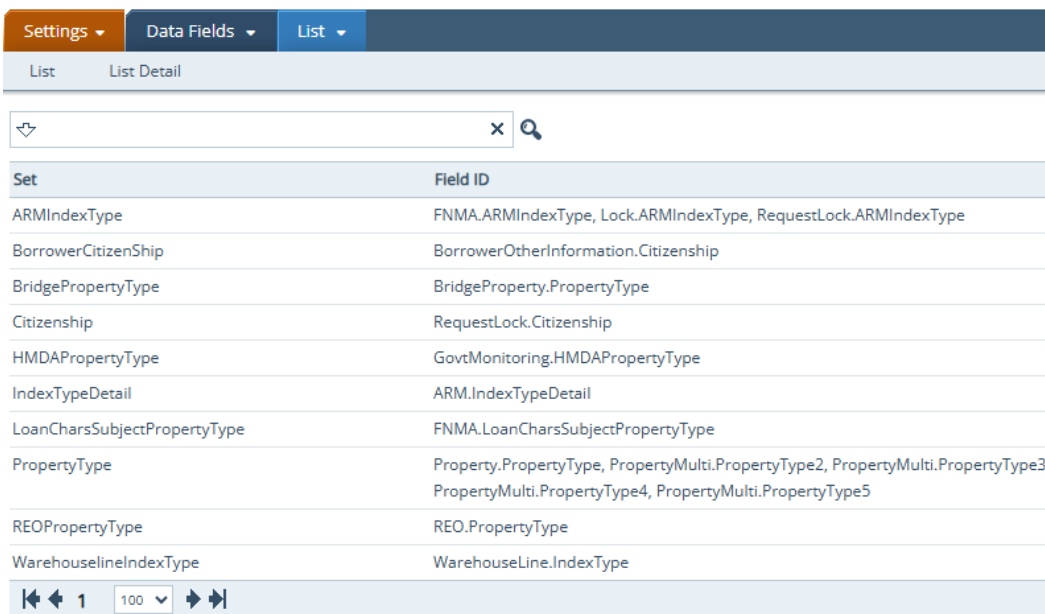
- ✓ Added the new **Settings > Data Fields** screen, which allows system administrators to show or hide specific dropdown values (enumerations) for selected fields, which are displayed in *Loans*. This capability supports use cases such as removing unsupported ARM index values from *ARM.IndexTypeDetail* in the UI while keeping the underlying field structure intact.

Purpose

- To allow more fine-grained admin control at the field-option level. Instead of hard-coding UI dropdown lists, admins can now manage which standard enumerations are available for users to select in *Loans*.

Usage

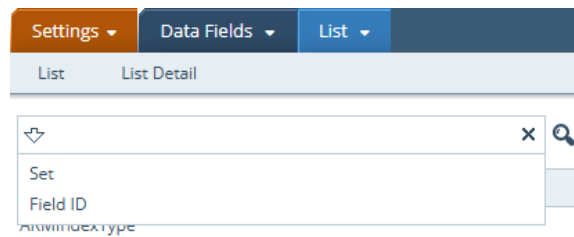
- Navigate to *Settings > Data Fields*.



Set	Field ID
ARMIndexType	FNMA.ARMIndexType, Lock.ARMIndexType, RequestLock.ARMIndexType
BorrowerCitizenship	BorrowerOtherInformation.Citizenship
BridgePropertyType	BridgeProperty.PropertyType
Citizenship	RequestLock.Citizenship
HMDAPropertyType	GovtMonitoring.HMDAPropertyType
IndexTypeDetail	ARM.IndexTypeDetail
LoanCharsSubjectPropertyType	FNMA.LoanCharsSubjectPropertyType
PropertyType	Property.PropertyType, PropertyMulti.PropertyType2, PropertyMulti.PropertyType3, PropertyMulti.PropertyType4, PropertyMulti.PropertyType5
REOPropertyType	REO.PropertyType
WarehouselineIndexType	WarehouseLine.IndexType

- Key elements:

- Search box with a search filter dropdown containing: **Set, Field ID** (default is blank)



- Blank searches across **Set + Field ID**






- **Set** corresponds to the broader category that contains the dropdown, for example:
 - **ARMIndexType**
 - **Set** column lists all supported sets
 - **Field ID** corresponds to the specific field IDs of the dropdowns that are displayed in *Loans*
 - **Field ID** column lists all field IDs within the selected set
- Selecting a row opens the details screen for that entry
- As the image below shows, the set **ARMIndexType** contains three separate dropdowns in *Loans* on different screens and tabs. These dropdowns essentially behave the same way and are synced with one another. Keep in mind that UI labels for certain dropdowns may vary, but they behave the same way and list the same options.

Settings ▾ Data Fields ▾ List ▾		
List	List Detail	
Set	ARMIndexType	
Field ID	FNMA.ARMIndexType, Lock.ARMIndexType, RequestLock.ARMIndexType	
Code	Displayed Options	Hide
1716088	11th District COF	
1716084	Daily CD Rate	
1716095	Fannie Mae 60-Day Required Net Yield	
1716091	Fannie Mae LIBOR	
1716094	Federal Cost of Funds	
1716096	Freddie Mac 60-Day Required Net Yield	
1716092	Freddie Mac LIBOR	
1716080	Monthly Average CMT	
1716093	National Average Contract Rate (FHLBB)	
1716089	National Monthly Median Cost of Funds	
1716087	T-Bill Daily Value	
1716090	Wall Street Journal LIBOR	
1716086	Weekly Ave Prime Rate	
1716085	Weekly Average CD Rate	
1716079	Weekly Average CMT	
1716083	Weekly Average SMTI	
1716082	Weekly Average TAABD	
1716081	Weekly Average TAAI	

Save Close Save & Close

- The **Code** column displays unique backend IDs that linked with each option.
- The **Displayed Options** column displays the options listed in the dropdown(s).
- The **Hide** column displays the shown/hidden status of each option.

- Click the icon in each row to determine whether the option is shown/hidden.

Code	Displayed Options	Hide
1716088	11th District COF	
1716084	Daily CD Rate	
1716095	Fannie Mae 60-Day Required Net Yield	
1716091	Fannie Mae LIBOR	
1716094	Federal Cost of Funds	

- After configuring the list of options, click:
 - **Save** to save the configuration, without leaving the screen
 - **Close** to close the screen, which does not save the configuration
 - **Save & Close** to save the configuration and leave the screen

Scope

- More configurable sets and field IDs will be added in future releases.
- Currently, the list of configurable sets and field IDs are:
 - **ARMIndexType**
 - **FNMA.ARMIndexType, Lock.ARMIndexType, RequestLock.ARMIndexType**
 - **BorrowerCitizenship**
 - **BorrowerOtherInformation.Citizenship**
 - **BridgePropertyType**
 - **BridgeProperty.PropertyType**
 - **Citizenship**
 - **RequestLock.Citizenship**
 - **HMDAPropertyType**
 - **GovtMonitoring.HMDAPropertyType**
 - **IndexTypeDetail**
 - **ARM.IndexTypeDetail**
 - **LoanCharsSubjectPropertyType**
 - **FNMA.LoanCharsSubjectPropertyType**
 - **PropertyType**
 - **Property.PropertyType, PropertyMulti.PropertyType2, PropertyMulti.PropertyType3, PropertyMulti.PropertyType4, PropertyMulti.PropertyType5**
 - **REOPropertyType**
 - **REO.PropertyType**
 - **WarehouselineIndexType**
 - **WarehouseLine.IndexType**

Custom

Custom Fields and Custom Screens

Custom Questions Import from Path POS (Zip) (50081)

Important Note on the Release of This Feature

This feature will be released after the official release date (April 19th, 2026), as the completion depends on development and testing from Path POS (Zip).

What's New

- ✓ Path now allocates a standardized set of Path POS (Zip) custom question/answer fields and imports borrower interview data from Path POS (Zip) into these fields.

Why This Matters

- You can capture borrower-specific custom questions/answers sent from Path POS (Zip) without manual mapping.
- You get a predictable set of fields that populate and label themselves as data arrives, where each question is imported once.

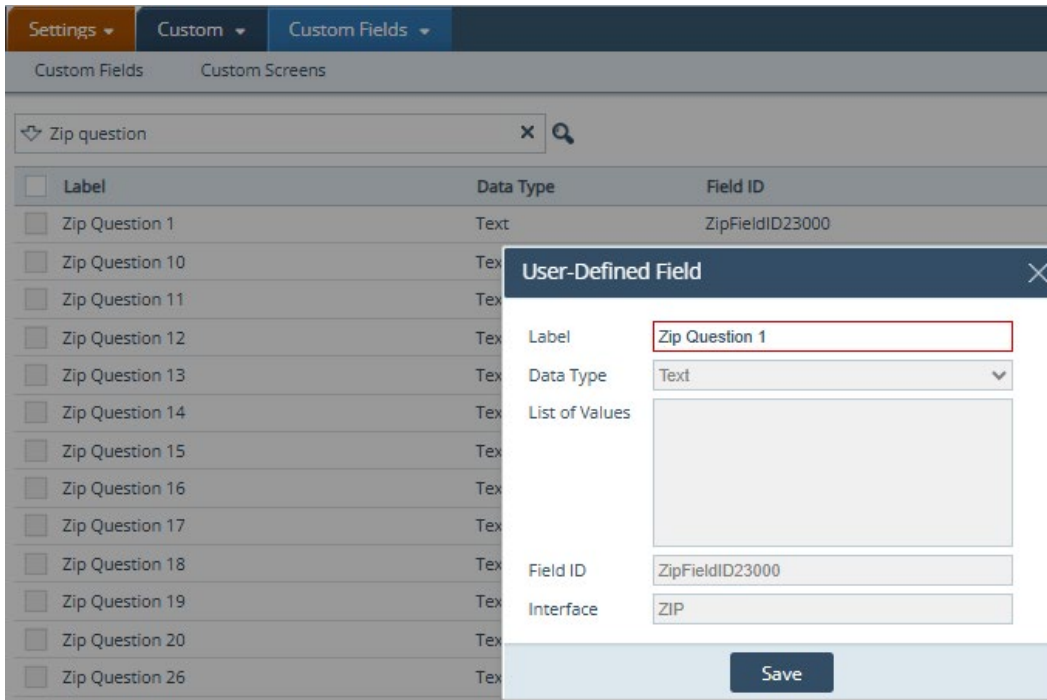
What's included

- Pre-allocated Path POS (Zip) custom fields (40 questions total)
- Question–Answer pairing logic
 - Each answer imports into the field paired with the immediately preceding question.
- Admin experience & protection
 - Go to *Settings > Custom > Custom Fields*. You'll see the Zip-allocated entries (**ZIP** in the *Interface* column), with labels that update to the incoming Path POS (Zip) question text and corresponding answer fields. Certain row controls are disabled for Zip-allocated items.

Settings ▾		Custom ▾		Custom Fields ▾	
Custom Fields		Custom Screens			
<input type="text" value="Zip question"/> ✕ 🔍					
<input type="checkbox"/>	Label	Data Type	Field ID	Interface	
<input type="checkbox"/>	Zip Question 1	Text	ZipFieldID23000	ZIP	
<input type="checkbox"/>	Zip Question 10	Text	ZipFieldID23018	ZIP	
<input type="checkbox"/>	Zip Question 11	Text	ZipFieldID23020	ZIP	
<input type="checkbox"/>	Zip Question 12	Text	ZipFieldID23022	ZIP	
<input type="checkbox"/>	Zip Question 13	Text	ZipFieldID23024	ZIP	
<input type="checkbox"/>	Zip Question 14	Text	ZipFieldID23026	ZIP	
<input type="checkbox"/>	Zip Question 15	Text	ZipFieldID23028	ZIP	

- Locked from deletion

- The system-allocated Path POS (Zip) question fields are locked to prevent deletion and preserve the import channel.
- Editable labels
 - The label in the *User-Defined Field* lightbox is editable, so admins can refine how the field caption displays in Path.

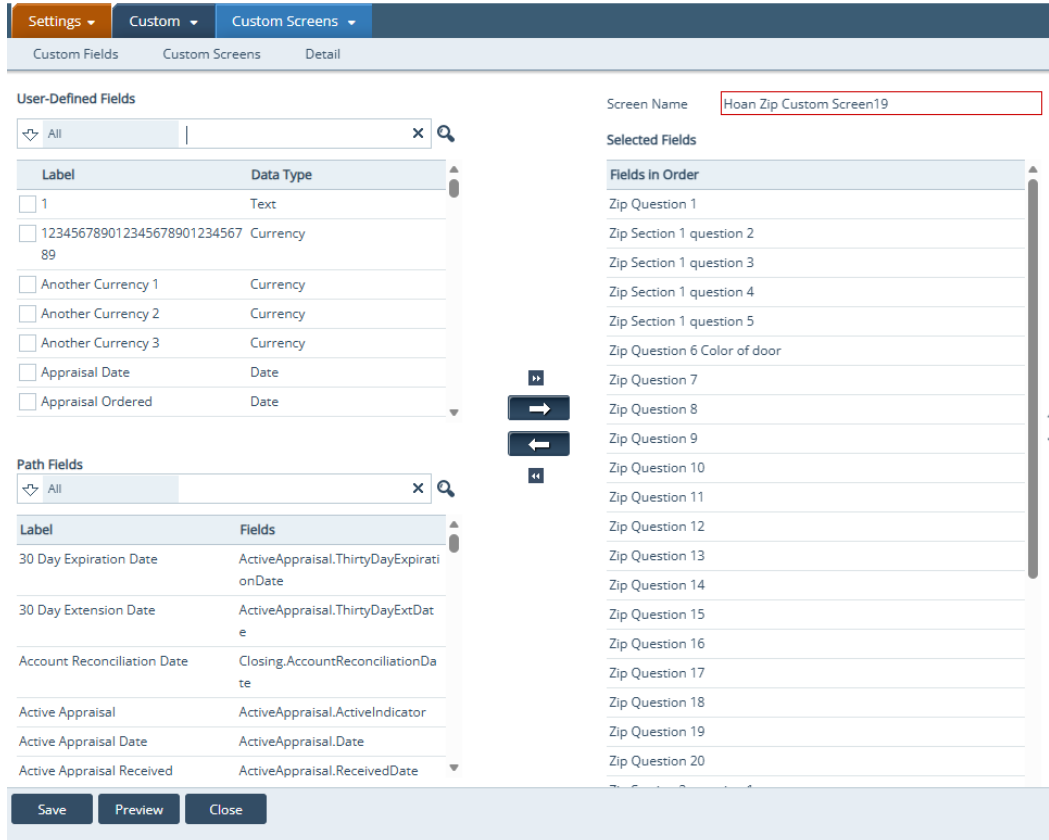


The screenshot shows the 'Custom Fields' section of the Path Calyx interface. A search bar at the top contains 'Zip question'. Below it is a table with columns for 'Label', 'Data Type', and 'Field ID'. The table lists 'Zip Question 1' through 'Zip Question 26', all with a 'Text' data type and 'ZipFieldID23000' as the field ID. A 'User-Defined Field' lightbox is open over the first row, showing configuration options: 'Label' (Zip Question 1), 'Data Type' (Text), 'List of Values' (empty), 'Field ID' (ZipFieldID23000), and 'Interface' (ZIP). A 'Save' button is at the bottom of the lightbox.

Label	Data Type	Field ID
Zip Question 1	Text	ZipFieldID23000
Zip Question 10	Text	ZipFieldID23000
Zip Question 11	Text	ZipFieldID23000
Zip Question 12	Text	ZipFieldID23000
Zip Question 13	Text	ZipFieldID23000
Zip Question 14	Text	ZipFieldID23000
Zip Question 15	Text	ZipFieldID23000
Zip Question 16	Text	ZipFieldID23000
Zip Question 17	Text	ZipFieldID23000
Zip Question 18	Text	ZipFieldID23000
Zip Question 19	Text	ZipFieldID23000
Zip Question 20	Text	ZipFieldID23000
Zip Question 26	Text	ZipFieldID23000

Additional Requirements

- To display the custom questions/answers imported from Path POS (Zip), create a custom screen and add the Zip Question to the custom screen.

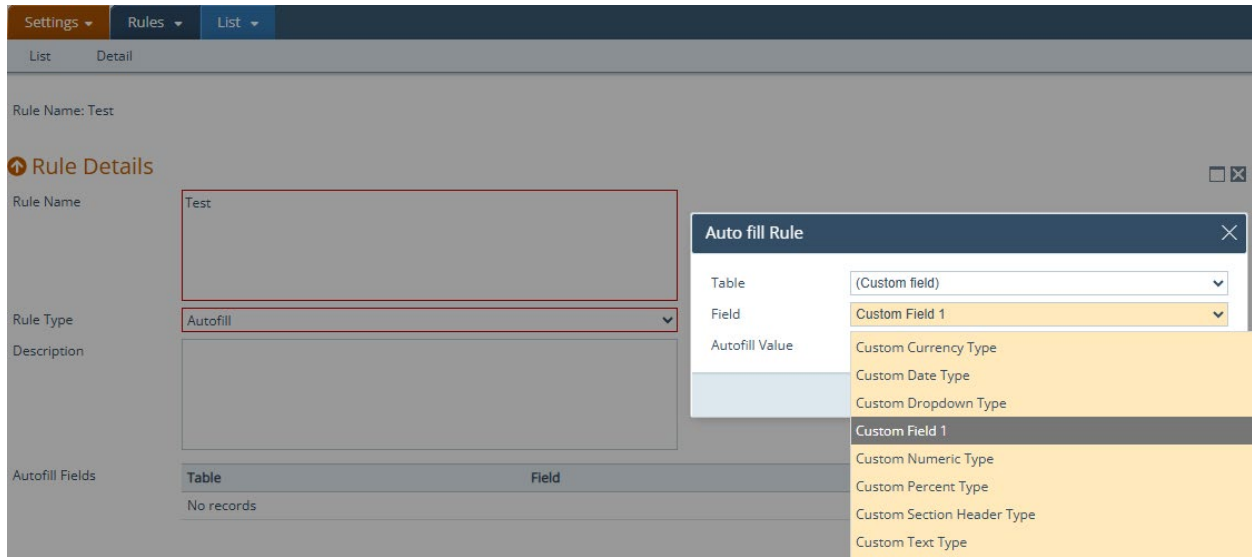


Rules

[Autofill Rules for Custom Fields \(42427\)](#)

What's Enhanced

- ✓ Added the ability to apply autofill rules to custom fields.



Purpose

- To allow system admins to set up autofill rules for custom fields created in Path.

Loans

Production

Quote Screen

New Fees Tab (51595)

What's New

- ✓ The **Fees** tab has been added to the *Quote* screen.

Purpose and Usage

- To allow users to access fees information without leaving the *Quote* screen, avoiding navigation to *Closing Costs* screen > *Fees* tab and saving time.
- The **Fees** tab on the *Quote* screen functions exactly the same as the *Fees* tab on the *Closing Costs* screen.
- All data entered or modified on either tab is synchronized with the other.

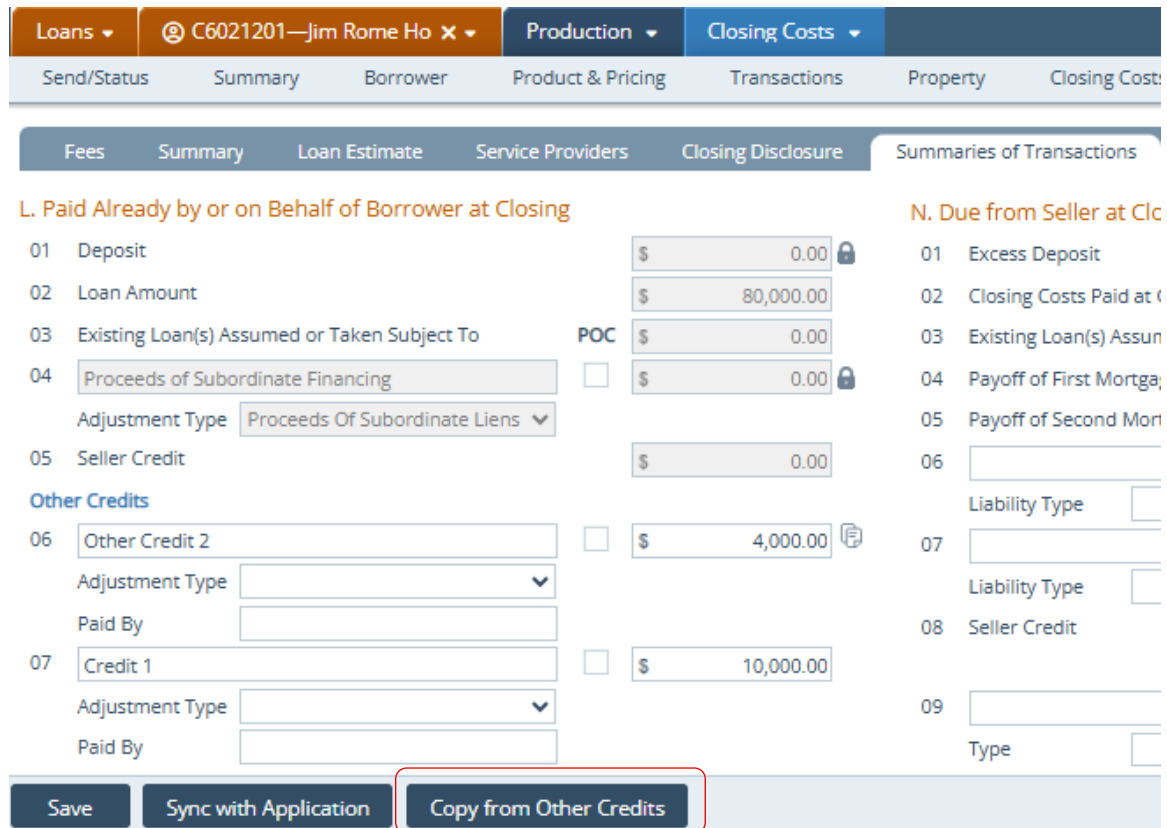
Production and Compliance

Closing Costs > Summaries of Transactions Tab

[Copy from Other Credits Button \(51679\)](#)

What's New

- ✓ Added the **Copy from Other Credits** button.



The screenshot shows the 'Summaries of Transactions' tab in the Path Calyx interface. The interface is divided into two main columns: 'L. Paid Already by or on Behalf of Borrower at Closing' and 'N. Due from Seller at Closing'. Each column contains a list of items with associated amounts and checkboxes. At the bottom, there are three buttons: 'Save', 'Sync with Application', and 'Copy from Other Credits', with the latter button highlighted by a red box.

Item ID	Description	Amount	POC	Other Credits
01	Deposit	\$ 0.00		
02	Loan Amount	\$ 80,000.00		
03	Existing Loan(s) Assumed or Taken Subject To	\$ 0.00	<input checked="" type="checkbox"/>	
04	Proceeds of Subordinate Financing	\$ 0.00	<input type="checkbox"/>	
05	Seller Credit	\$ 0.00		
06	Other Credit 2	\$ 4,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
07	Credit 1	\$ 10,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

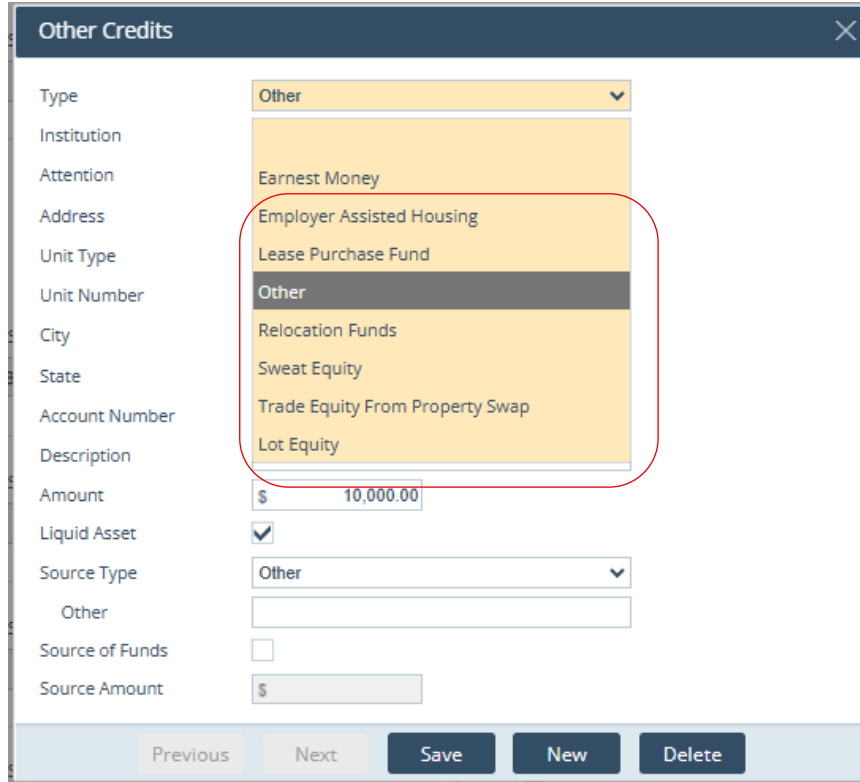
Purpose and Usage

- Click this button to copy over the *Other Credits* from the *Borrower* and *Transactions* screens.
- This button also ensure that *Other Credits* and *Other Financing* are separated, where *Other Credits* are added to L06/07 and *Other Financing* is added to L04.

Scope

- The *Other Credits* from the *Borrower* screen are copied over when *Type* equals the following (except for *Earnest Money*):
 - *Employer Assisted Housing*
 - *Lease Purchase Fund*
 - *Other*

- Relocation funds
- Sweat Equity
- Trade Equity From Property Swap
- Lot Equity



- The *Other Credits* from the *Transactions* screen are copied over, for all types of *Other Credits*.

Other Credit
✕

Type	Tax Proration	
Description		
Amount	Borrower Paid Fees	
	Builder Developer	
Type	Employer Affiliate	
Amount	Employer Assisted Housing	
	FHA 203k Rehabilitation Cost	
	FHA Energy Efficient Mortgage Improvements	
	FHA Non-Financed Repairs/Improvements	
	FHA Required Cash Investment	
	Lease Purchase Fund	
	Lender Affiliate	
	Mortgage Insurance Premium Refund	
	Other	
	Other Interested Party	
	Real Estate Agent	
	Relocation Funds	
	Sweat Equity	
	Tax Proration	
	\$	0.00
CD Adjustments	\$	
Undeposited Gift Funds	\$	0.00
		Include from Summaries of Transactions (L06) <input type="checkbox"/> ⓘ
Total Other Credits	\$	14,000.00

Save

- If there are more than two *Other Credits*, the total amount of all *Other Credits* is added to L06, and L07 is left blank.

Interfaces

AUS Screen

New DualAUS Tab (45344)

What's New

- ✓ Introduced the **DualAUS** screen, a new feature that lets users run Fannie Mae Desktop Underwriter (DU) and Freddie Mac Loan Product Advisor (LPA) in a single submission from one screen, instead of submitting the two AUS requests separately.

Loans ▾ @ C6021201—Jim Rome Ho ✕ ▾ Interfaces ▾ AUS ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance Fraud Audit Verifications ▾

Portfolio Underwriter Desktop Originator Desktop Underwriter Desktop Originator M3.4 Desktop Underwriter M3.4 FHA Total Scorecard EarlyCheck DualAUS

Submission Information

Submission Request: Credit & Underwriting ▾ DU Casefile ID:

Credit Company: Factual Data by CBC (1) ▾ LPA Casefile ID:

Technical Affiliate: ▾

AUS Information

Borrower's Credit Agency

Borrower	Joint With	Credit Reference Number
<input type="text"/> ▾	<input type="text"/> ▾	<input type="text"/>
<input type="text"/> ▾	<input type="text"/> ▾	<input type="text"/>
<input type="text"/> ▾	<input type="text"/> ▾	<input type="text"/>
<input type="text"/> ▾	<input type="text"/> ▾	<input type="text"/>

Validation Service Providers +

<input type="checkbox"/> Borrower	Service Provider	Service Type	Validation Number
No records			

History

Date/Time	Ordered By	Request Type	AUS Type	Status	Recommendation	Case Number	Credit Report	Findings Report
No records								

Save Order

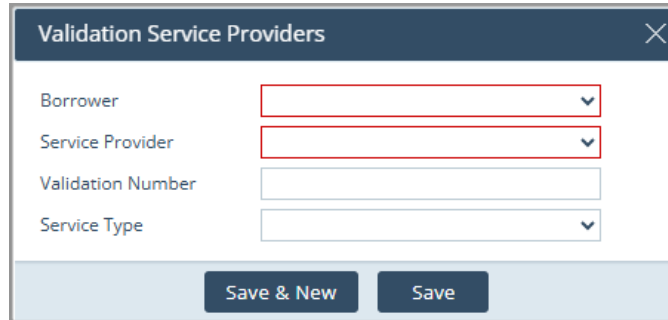
Purpose

- Dual AUS streamlines underwriting by:
 - Reducing duplicate steps (one submission instead of two).
 - Returning DU and LPA results together so users can quickly compare outcomes and then choose which provider's results to import into the loan.

Usage

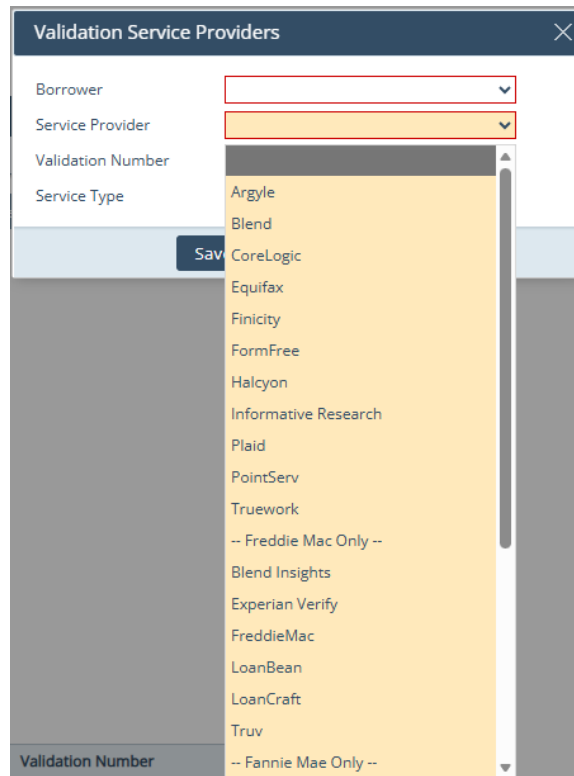
- Submission options
 - **Submission Request**—required, select:
 - **Credit & Underwriting**
 - **Underwriting Only**
- Credit configuration (when applicable)
 - **Credit Company**—includes options such as:
 - **Factual Data by CBC**
 - **MeridianLink**

- **ShaperLending**
- **Equifax Mortgage Solutions**
- **Corelogic CREDCO**
- **Technical Affiliate**—required only for specific credit companies (e.g., **Equifax Mortgage Solutions, ShaperLending, MeridianLink**); otherwise not required.
- **Validation Service Providers** section (optional)
 - **DualAUS** includes a **Validation Service Providers** section to capture borrower-level verification provider details. Click the add icon to open the corresponding lightbox.



The image shows a lightbox titled "Validation Service Providers" with a close button (X) in the top right corner. It contains four input fields: "Borrower" (a dropdown menu), "Service Provider" (a dropdown menu), "Validation Number" (a text input field), and "Service Type" (a dropdown menu). At the bottom of the lightbox, there are two buttons: "Save & New" and "Save".

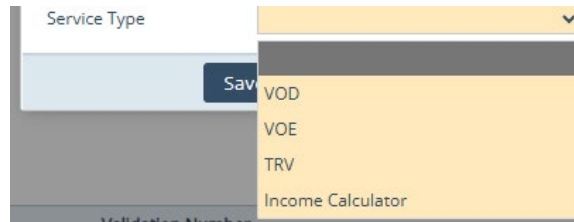
- **Borrower**—selectable list of up to **5 borrowers**.
- **Service Provider**—includes providers such as **Argyle, Blend, CoreLogic, Equifax, Finicity, FormFree, Plaid, Truework**, plus Freddie-only and Fannie-only options.



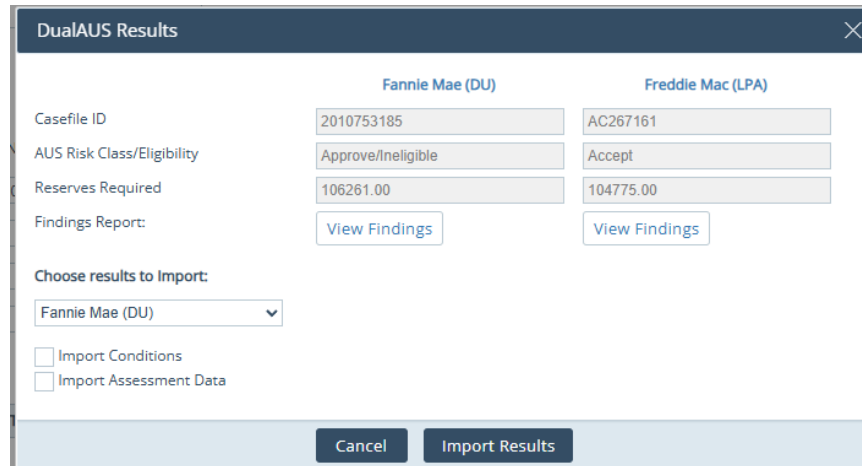
The image shows the same "Validation Service Providers" lightbox, but with the "Service Provider" dropdown menu open. The dropdown menu lists the following options: Argyle, Blend, CoreLogic, Equifax, Finicity, FormFree, Halcyon, Informative Research, Plaid, PointServ, Truework, -- Freddie Mac Only --, Blend Insights, Experian Verify, FreddieMac, LoanBean, LoanCraft, Truv, and -- Fannie Mae Only --. A "Save" button is visible on the left side of the dropdown menu.

- **Validation Number**—editable; supports auto-copy behavior for FormFree/VOA key scenarios as defined in the FRD.

- Service Type—supports values such as VOD, VOE, TRV, Income Calculator.



- The **DualAUS Results** lightbox displays the results after the order is sent.



- **History** section (tracking Dual AUS runs)
 - **DualAUS** records the history using fields, including:
 - **Date/Time**—uses return timestamp when available, otherwise defaults to now.
 - **Ordered By**—Path user first/last name.
 - **Request Type**—based on the user’s submission selection.
 - **AUS Type/Status/Recommendation/Case Number**—populated based on returned provider data and selection rules.
 - **Findings Report** and **Credit Report**—document links stored by filename and accessible via the attachment icon.

Initial/Closing Docs Screen

UCD File Generation (49730)

What’s Enhanced

- ✓ Added support to request **UCD File Generation** directly from DocMagic Direct, plus a new field to capture the returned **Document Set Identifier**.

Loans ▾ C6030310—Jim Rome Ho ✕ ▾ Interfaces ▾ Initial/Closing Docs ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance Fraud Audit Verifications ▾

Order

Document Provider: DocMagic Direct ▾ Request Type: Uniform Closing Dataset ▾ Task: Audit ▾

Account Number: Package Type: Official Documents:

Username: Supplement Language: Return Document Packaging: All Forms in One Document ▾

Password: Document Plan Code:

Loan Program: Service Type: Enable Electronic Signatures:

Promissory Note: Notary Documents: Notary Service Provider:

Submit MERS Registration: Alternate Lender Code:

Transfer To Code: Business Use:

UCD File Generation:

Document Set Identifier:

UCD File Generation Only
UCD File Generation with Fannie Mae Delivery
UCD File Generation with Freddie Mac Delivery

History

Purpose and Usage

- When *Document Provider = DocMagic Direct* and *Request Type = Uniform Closing Dataset*, the **UCD File Generation** dropdown is displayed, allowing users to choose:
 - **UCD File Generation Only**
 - **UCD File Generation with Fannie Mae Delivery**
 - **UCD File Generation with Freddie Mac Delivery**
- **Document Set Identifier** is displayed as a read-only field if it is included in the returned order.

Note

- The credentials used for Fannie Mae and Freddie Mac are the same as those configured for the *Interfaces > UCD* screen.
- When ordering the Fannie Mae or Freddie Mac deliveries, DocMagic creates the UCD file and delivers it to Fannie Mae or Freddie Mac.

Verifications Screen

Order Tax Transcripts Lightbox

Attach eSign Document to Tax Transcript (51640)

What's New

- ✓ Now, you have the ability to attach documents that have been electronically signed by the borrower when ordering tax transcripts.

Tax Transcript
✕

Main

Current Information Legal Entity

Edit Tax Return Information [?](#)

First Name Address

Middle Name Unit Type

Last Name/ BMF Company Name Unit Number

Suffix City

Tax ID State ZIP

Title

Phone

Previous Tax Return Information (if different) [?](#)

First Name

Middle Name

Last Name

Suffix

Transcript Information

Transcript Request Request Year(s)

Transcript Type

Wage and Income Transcript

Transcript Forms

Transcript Requesting For

IRS Records Consent

Spouse

Current Information [?](#)

First Name

Middle Name

Last Name

Suffix

Tax ID

Spouse Previous Tax Return Information (if different) [?](#)

First Name

Middle Name

Last Name

Suffix

Transcript Fees

Cost Fiscal Year End Date

Number of Returns

Total Cost

Return Refund to 3rd Party

Attach 4506-C Authorization Form

Electronically Signed by the Borrower

From Computer

Or

From Document List

Documents > List

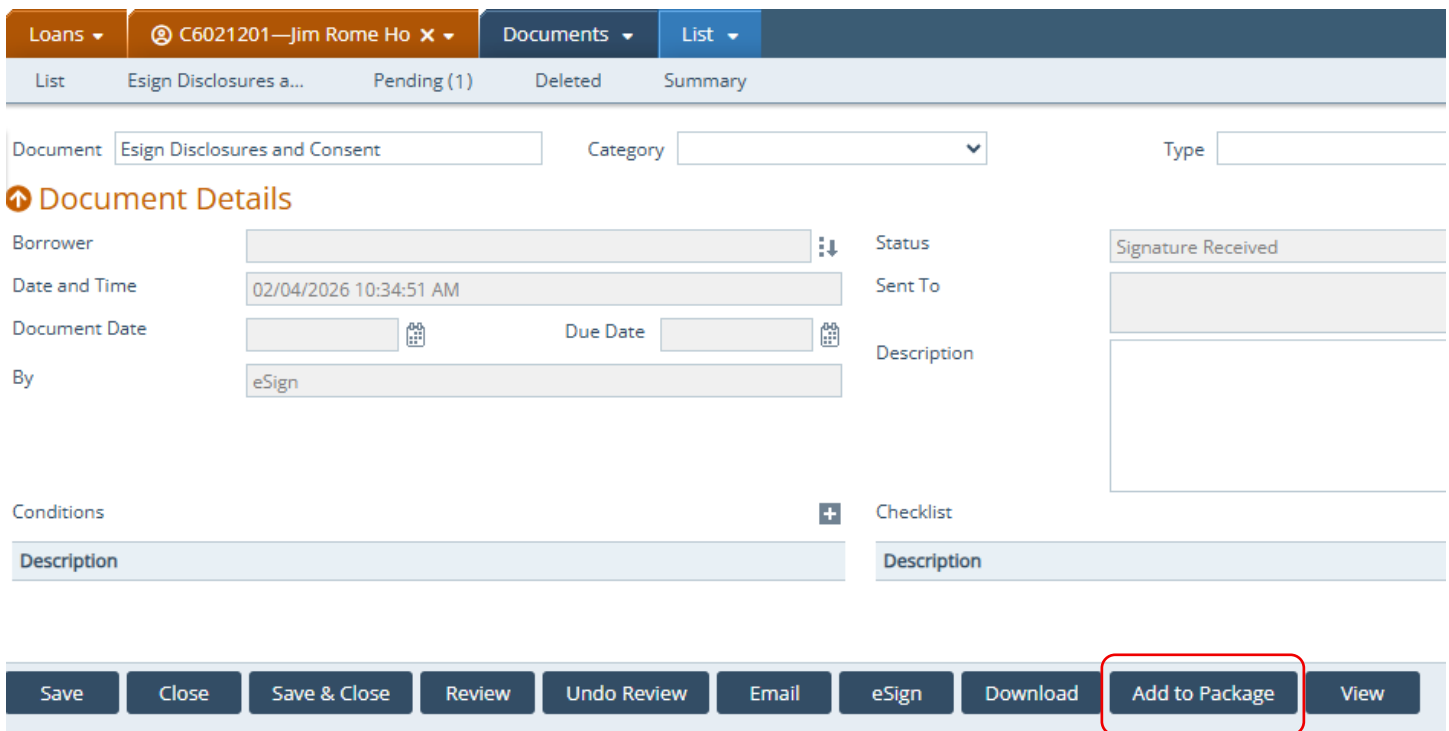
Add to Package Button/Lightbox (48892)

What's New

- ✓ New **Add to Package** button/lightbox on the document's details/edit screen.

Purpose

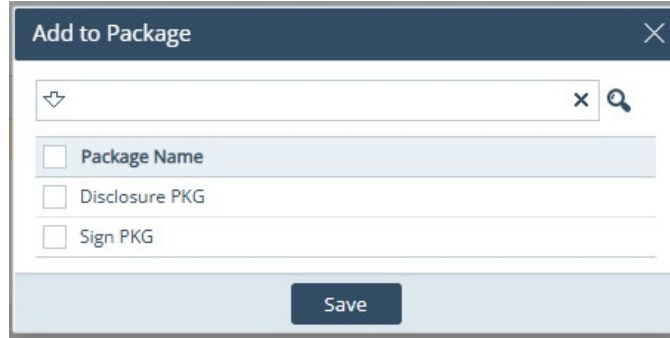
- To allow you to add the document you are currently viewing/editing to a package (or multiple packages) directly from within the document, without leaving the document.
- Previously, you had to exit the document and either add it from the main *Documents > List* screen or open the specific package and add the document from within the package.



The screenshot shows the 'Documents > List' interface for a loan file 'C6021201—Jim Rome Ho'. The document being viewed is 'Esign Disclosures and Consent'. The 'Add to Package' button in the bottom right of the action bar is highlighted with a red rectangle.

Usage

- Click **Add to Package** to open the corresponding lightbox, which lists existing packages created in the loan file's *Documents* activity.
 - If no packages exist in the loan file's *Documents* activity, the lightbox will be empty.



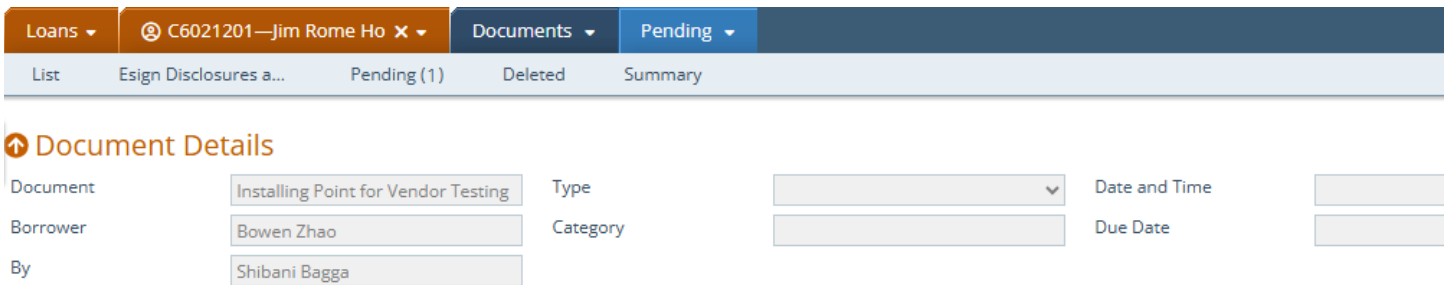
- Select the checkbox(es) of the package(s), then click **Save**.
 - The same document can be added to multiple packages from this lightbox.

Documents > Pending

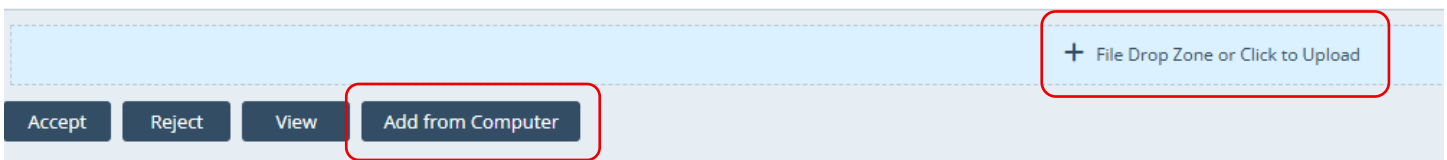
Upload Documents on Pending Screen (49607)

What's New

- ✓ On the *Documents > Pending* screen, you can now use the **Add from Computer** button and **+ File Drop Zone or Click to Upload** feature.



Document Image View



Purpose

- Previously, the *Documents > Pending* screen only received documents sent to Path, through the document request feature, limiting how documents could be added to the *Pending* screen.
- The newly added upload options provide more flexibility by allowing you to upload requested documents directly to the *Pending* screen from your computer—without relying on the document request feature in Path.

- For example, the borrower can attach and send you a requested document through email. After the receipt of the document, you can simply go to the *Pending* screen and upload the document from there.

Usage

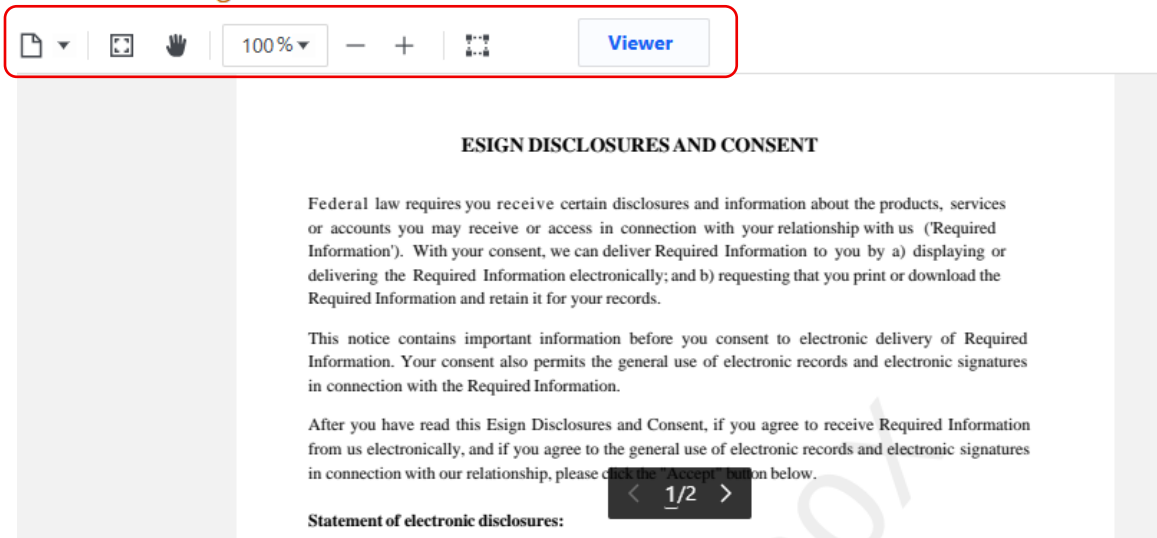
- These features work the same as they do on the *Document > List* screen.

PDF Viewer on Pending Screen (51331)

What's New

- ✓ The PDF **Viewer** feature can now be used on the *Documents > Pending* screen.

Document Image View



Purpose and Usage

- This allows you to:
 - Open the left panel and display the document in thumbnails
 - View the document in full screen
 - Pan the document
 - Zoom in and out
 - Snip and download screenshots of the document
- The PDF **Viewer** works the same as it does on the *Documents > List* screen.
- The *Annotations, Signatures, and Document Editor* features are not available on the *Pending* screen, as they are not needed for pending documents.

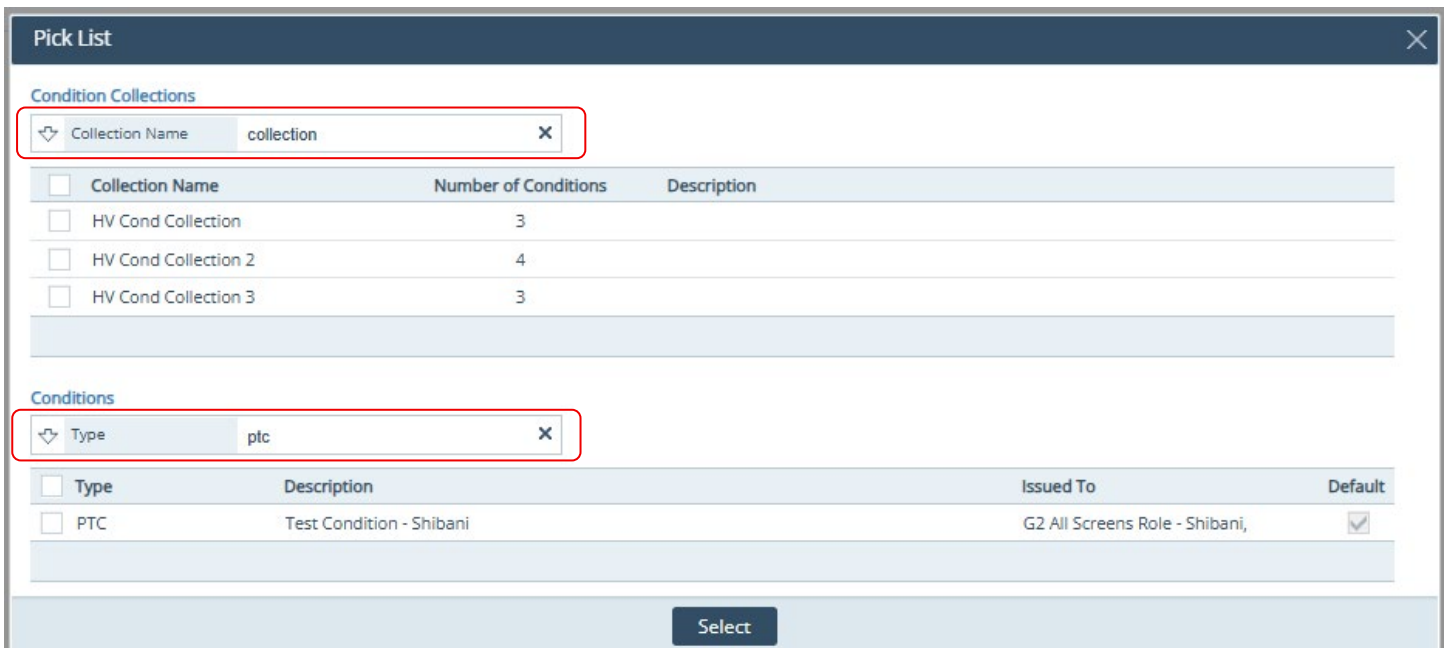
Conditions

Pick List Lightbox

Search Function Enhancement (51580)

What's Enhanced

- ✓ Enhanced the search functionality for the *Conditions > Pick List* lightbox.



Usage

- The search icon has been removed—filtering now occurs as you type. Enter a term and the list of *Condition Collections* and *Conditions* updates automatically.
- Click the close icon (X) to clear the search and restore the full list of *Condition Collections* and *Conditions*.

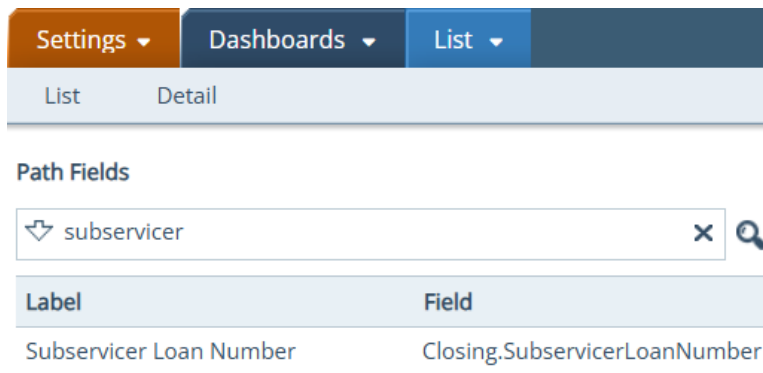
Updates

Settings

Dashboards

New Field (51254)

- ✓ Added **Closing.SubservicerLoanNumber** (field label: **Subservicer Loan Number**) as a field that can be added to dashboards.



New Fields (50454)

- ✓ Added the following as fields that can be added to dashboards.
 - **AUS.DUCasefileID** (field label: **DU Casefile ID**)
 - **AUS.CaseNumber** (field label: **DU Case ID/LPA Key Number**)
 - **AUS.LPDocClass** (field label: **LPA Doc Class (Freddie)**)

Custom

Custom Screens

New Field (51568)

- ✓ Added **Investor.Name** (field label: **Investor Name**) as a field that can be added to custom screens.

Settings ▾ Custom ▾ Custom Screens ▾

Custom Fields Custom Screens Detail

Path Fields

⏏ × 🔍

Interest Only	Product.InterestOnlyIndictor
Introductory Rate Period	GovtMonitoring.IntroductoryRatePeriod
Investor Collateral Program ID	Investor.CollateralProgramID
Investor Name	Investor.Name
Investor Purchase Disbursement Date	InvestorPurchase.DisbursementDate
Investor Purchase Note Date	InvestorPurchase.NoteDate
Investor Suspense Cleared Date	Loan.InvestorSuspenseClearDate
Investor Suspense Date	Loan.InvestorSuspenseDate

Column Layout ▾

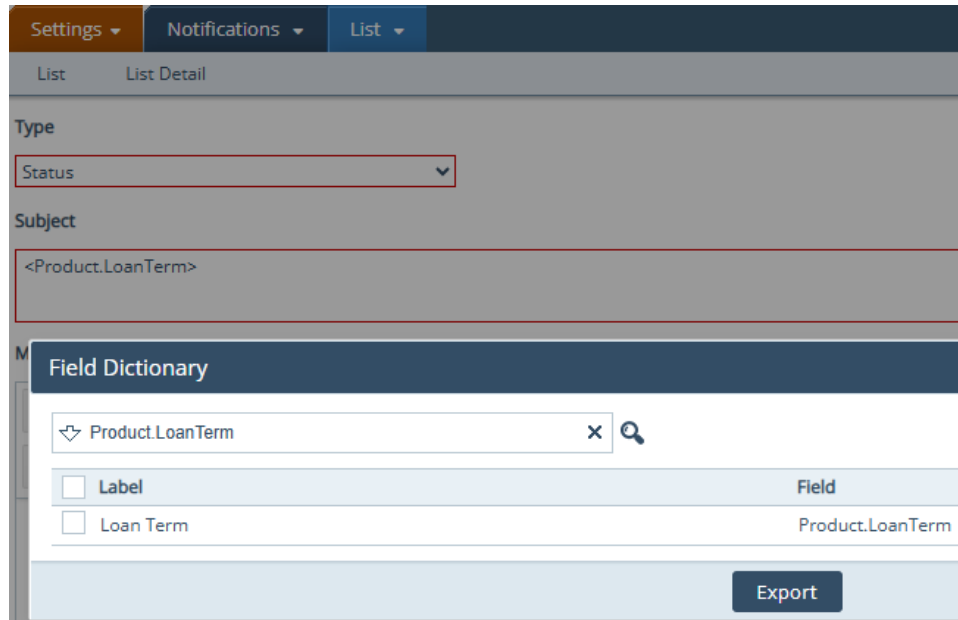
Production Status History

Lock Status History

Notifications

[New Field \(51381\)](#)

- ✓ Added **Product.LoanTerm** (field label: **Loan Term**) as a field that can be sent in notification emails.



New Field (51558)

- ✓ Added **LoanData.LoCompType** and **LoanData.LoCompTypeCD** (field label: **Broker Comp Paid By**) as a field that can be sent in notification emails.

New Fields (51670)

- ✓ Added the following as fields that can be sent in notification emails:
 - **AUS.DUCasefileID** (field label: **DU Casefile ID**)
 - **AUS.CaseNumber** (field label: **DU Case ID/LPA Key Number**)
 - **Loan.UnderwritingMethod** (field label: **LPA Doc Class (Freddie)**)
 - **AUS.AUSEngine** (field label: **AUS Engine**)
 - **AUS.AUSRecommendation** (field label: **AUS Recommendation**)
 - **AUS.LPDocClass** (field label: **LPA Doc Class (Freddie)**)
 - **AUS.PurchaseEligibility** (field label: **LPA Purchase Eligibility**)

Configuration

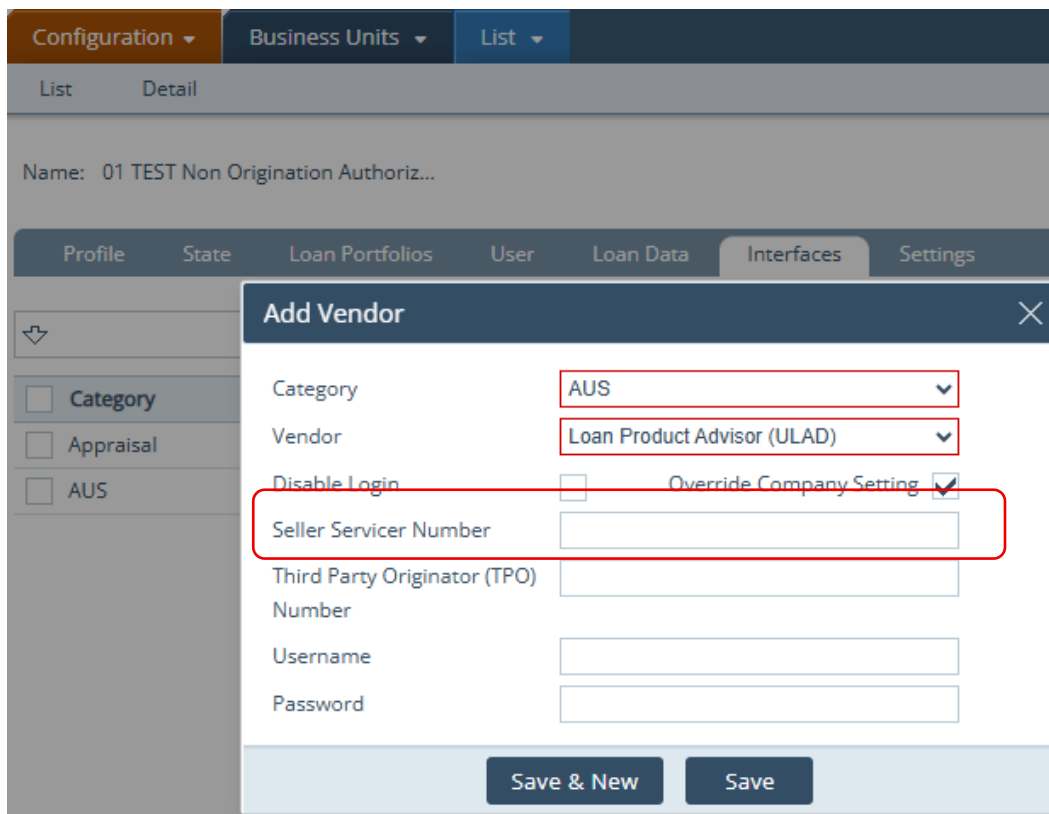
Business Units

Interfaces > Add/Edit Vendor Lightbox

Seller Servicer Number Update (51269)

What's Updated

- ✓ The *Seller Servicer Number* field is no longer required.



The screenshot shows the 'Add Vendor' lightbox in the Path Calyx configuration interface. The lightbox is open over the 'Interfaces' tab. The 'Seller Servicer Number' field is highlighted with a red box, indicating it is no longer required. Other fields include Category (AUS), Vendor (Loan Product Advisor (ULAD)), Disable Login, Override Company Setting (checked), Third Party Originator (TPO) Number, Username, and Password. Buttons for 'Save & New' and 'Save' are at the bottom.

Purpose

- Previously, this field was required, which caused issues for lenders that do not use a seller servicer number, such as correspondent lenders that use the TPO number.
- Now, this field is no longer required.

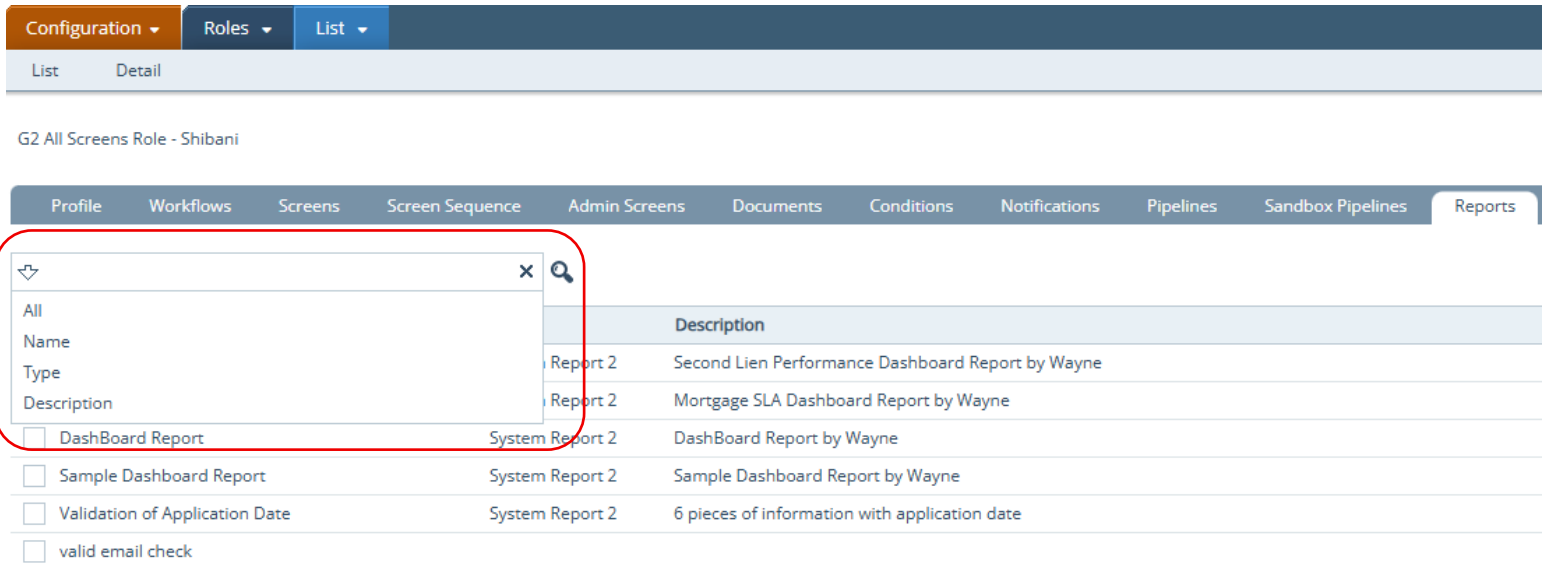
Roles

Reports

New Search Function (49405)

What's New

- ✓ Added the search box and functionality.



Configuration ▾ Roles ▾ List ▾

List Detail

G2 All Screens Role - Shibani

Profile Workflows Screens Screen Sequence Admin Screens Documents Conditions Notifications Pipelines Sandbox Pipelines Reports

	Description
<input type="checkbox"/> Report 2	Second Lien Performance Dashboard Report by Wayne
<input type="checkbox"/> Report 2	Mortgage SLA Dashboard Report by Wayne
<input type="checkbox"/> DashBoard Report	System Report 2 DashBoard Report by Wayne
<input type="checkbox"/> Sample Dashboard Report	System Report 2 Sample Dashboard Report by Wayne
<input type="checkbox"/> Validation of Application Date	System Report 2 6 pieces of information with application date
<input type="checkbox"/> valid email check	

Loans

Reports

New Reports

- ✓ Added the **MCR Report 2026, Ver 7** and **HMDA Standard Report 2026**.

Loans ▾	Reports ▾	Reports ▾	
Dashboard Reports	Reports	Reports History	Duration Reports
<input type="text" value="2026"/> ✕ 🔍			
<input type="checkbox"/>	Title		Type
<input type="checkbox"/>	MCR Report 2026, Ver 7		System Report 2
<input type="checkbox"/>	HMDA Standard Report 2026		System Report 2

Note

- For these reports to be available for use, the system admin should go to in *Configurations > Roles > Reports*.

New Dashboard Reports

- ✓ Added the following reports for the *Dashboard*:
 - **Dashboard Report - Pipeline**
 - **Dashboard Report - Compliance**
 - **Dashboard Report – Lock**

Note

- For these reports to be available for use, the system admin should go to in *Configurations > Roles > Reports*.

Documents

Category and Type Update (50528)

What's Updated

- ✓ The *Category* and *Type* dropdowns have been improved to work faster and more intuitively on the document's details/edit screen.

Loans ▾	🔍 C6021201—Jim Rome Ho ✕ ▾	Documents ▾	List ▾
List	Esign Disclosures a...	Pending	Deleted
Document	<input type="text" value="Esign Disclosures and Consent"/>	Category	<input type="text" value=""/>
		Type	<input type="text" value=""/>

📄 **Document Details**

How It Works

- ✓ Change *Category* without clearing *Type*
 - You can now change *Category* directly—even if *Type* is selected. No need to set *Type* = blank first.

- Previously, you had to set *Type* = blank, before the other options from the *Category* dropdown can be displayed.
 - Now, the *Category* dropdown lists all options, so you can directly change it to any other option. No additional steps required.
- ✓ Auto-select *Category* when choosing *Type*
- If *Category* = blank and you select a *Type*, the *Category* dropdown automatically defaults to the category/type pairing, which was set in *Settings > Documents*.
 - If a *Type* is paired with multiple categories, *Category* defaults to the first category listed in *Settings > Documents > Types* (only this screen).
 - The first category refers to the order of categories listed in the *Categories* section in *Settings > Documents > Types*.

Notes

Same as before:

- If *Category* is chosen first, the *Type* dropdown continues to be limited to only the types associated with that category (as defined in *Settings > Documents > Types* and *Settings > Documents > Categories*).
- When *Category* = blank, the *Type* dropdown displays all options, unconstrained by type/category pairings in *Settings > Documents*).
- Paired associations between categories and types are defined in *Settings > Documents > Types* and *Settings > Documents > Categories*.

Expiration Date Update (47453)

What's Updated

- ✓ Update the *Expiration Date* for documents.
- Now, documents remain valid through the *Expiration Date* and expire at midnight (12:00 a.m.) the following day.

Example

- If the *Expiration Date* is 02/17/2026, the document expires at 12:00 a.m. on 02/18/2026.

Document Details

Borrower	<input type="text"/>	Status	Signature Received
Date and Time	02/04/2026 10:31:19 AM	Sent To	<input type="text"/>
Document Date	<input type="text"/>	Due Date	<input type="text"/>
By	eSign	Description	<input type="text"/>
Conditions		Checklist	
Description		Description	

Active	Version	Reviewed	Review Date/Time	Expiration Date	Comments
<input checked="" type="checkbox"/>	1			02/17/2026	

Package View Update (49697)

What's Updated

- ✓ When you open a document from a package and then exit the document, you now remain inside that package.
- ✓ Previously, exiting a document returned you to *Documents > List*, requiring you to re-open the package to view additional documents from that package.
- ✓ Now, you stay in the package and can continue navigating its documents without reselecting the package.

Interfaces

Appraisal Screen

Mercury Appraisal Integration Update (51605)

What's Updated

- ✓ Path now supports Mercury Network's new appraisal integration for the UAD 3.6 appraisal format. The overall workflow remains the same, but the technical request/response specifications have been updated, including a move from UAD 2.6 to UAD 3.6 in the appraisal response XML.
 - Path continues to support the existing Mercury appraisal integration alongside this new integration.

Audit Screen

TLS 1.3 Update (51468)

What's Updated

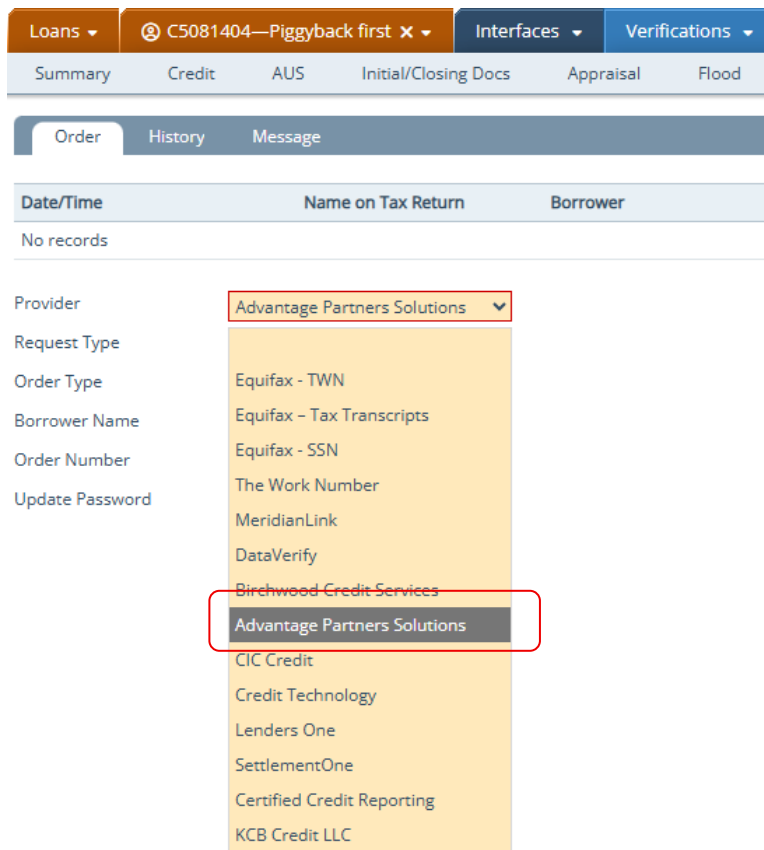
- ✓ Path now supports TLS 1.3, ensuring audit submissions proceed normally.

Verifications Screen

Provider List Update (51860)

What's Updated

- ✓ *Advantage Credit* has been changed to **Advantage Partner Solutions**, in accordance with the company's rebranding.

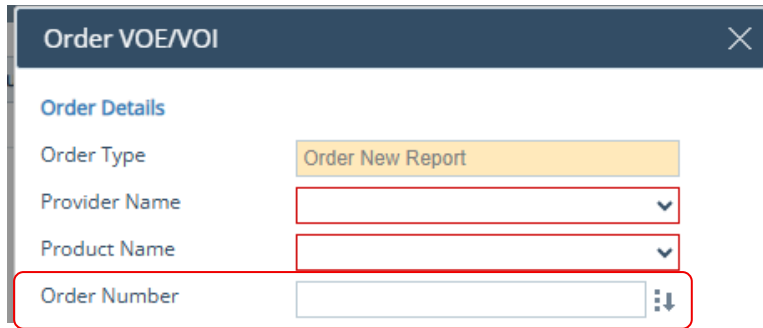


The screenshot shows the 'Verifications' tab in a software interface. At the top, there are navigation tabs: 'Loans', 'C5081404—Piggyback first', 'Interfaces', and 'Verifications'. Below these are sub-tabs: 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', and 'Flood'. A secondary set of tabs includes 'Order', 'History', and 'Message'. A table with columns 'Date/Time', 'Name on Tax Return', and 'Borrower' is shown with 'No records'. Below the table, a form field for 'Provider' is open, displaying a dropdown menu with the following options: Advantage Partners Solutions (selected), Equifax - TWN, Equifax - Tax Transcripts, Equifax - SSN, The Work Number, MeridianLink, DataVerify, Birchwood Credit Services, Advantage Partners Solutions (highlighted with a red box), CIC Credit, Credit Technology, Lenders One, SettlementOne, Certified Credit Reporting, and KCB Credit LLC.

Order Number Field Update (51845)—Verified

What's Updated

- ✓ In the *Order VOE/VOI* lightbox, the *Order Number* field is now always editable.



Purpose

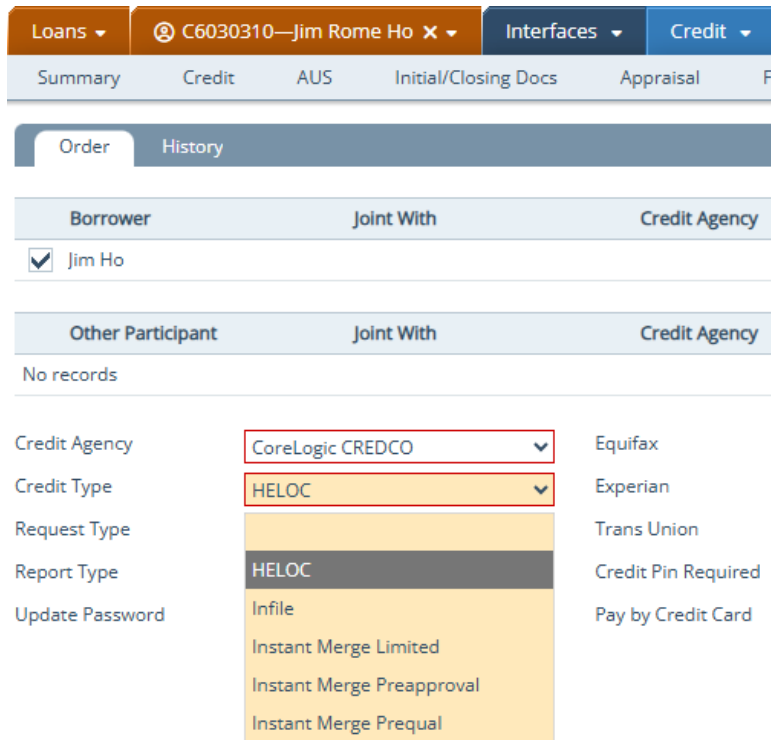
- To allow you to enter the previous order number when manually ordering VOE/VOI.

Credit Screen

HELOC Option for CoreLogic CREDCO (51758)

What's New

- ✓ Added HELOC to the *Credit Type* dropdown for *Credit Agency = CoreLogic CREDCO*.

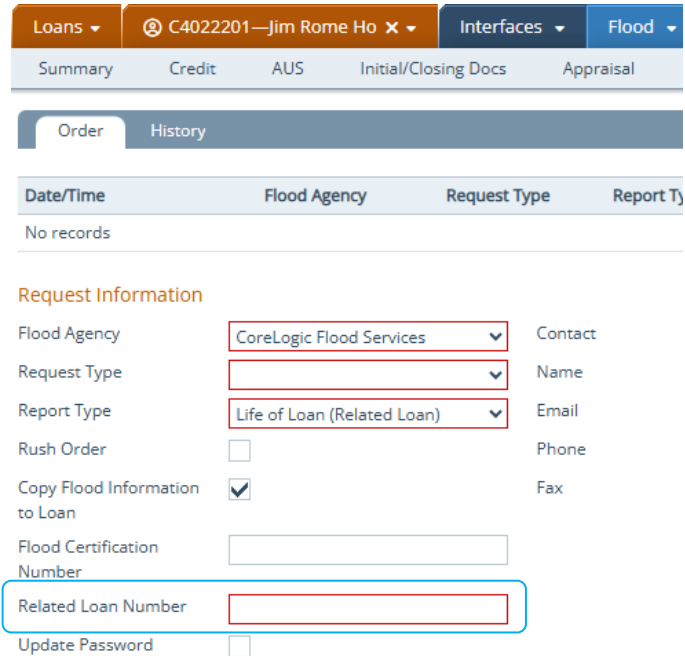


Flood Screen

Related Loan Number (51541)

What's New

- ✓ Added the **Related Loan Number** field for CoreLogic Flood Services.



The screenshot shows the 'Flood' screen for loan C4022201. The 'Request Information' section contains the following fields:

- Flood Agency: CoreLogic Flood Services
- Request Type: (empty dropdown)
- Report Type: Life of Loan (Related Loan)
- Rush Order:
- Copy Flood Information to Loan:
- Flood Certification Number: (empty text box)
- Related Loan Number: (empty text box, highlighted with a red border)
- Update Password:

Purpose and Usage

- To allow you to enter the related loan's loan number.
- The field is enabled when the following options are selected from the *Report Type* dropdown:
 - *Life of loan (Refinance Loan) with Census*
 - *Life of Loan (Related Loan) with Census*
 - *Life of Loan (Refinance Loan)*
 - *Life of Loan (Related Loan)*

Initial/Closing Docs Screen

Transfer To Code API (51374)

What's New

- ✓ Added the **Transfer to Code** field and lightbox.

Loans ▾ C4022201—Jim Rome Ho ✕ ▾ Interfaces ▾ Initial/Closing Docs ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance Fraud Audit Verifications ▾

Order

Document Provider: Request Type: Task:

Account Number: Package Type: Official Documents:

Username: Supplement Language: Return Document Packaging:

Password: Document Plan Code: Loan Program:

Service Type: Enable Electronic Signatures:

Promissory Note: Notary Documents:

Notary Service Provider: Submit MERS Registration:

Alternate Lender Code: Transfer To Code:

Business Use: UCD File Generation:

Document Set Identifier:

Purpose

- To support the Transfer To Code API for DocMagic Direct.

Usage

- Click the edit icon of the **Transfer to Code** field to open the corresponding lightbox.

Transfer To Code

Document Plan code	Description	Code
No Record		

- Here, you can select from a list of investors, which is then sent to DocMagic to be printed on forms.

UCD Screen

Freddie Mac UCD Authentication Update (51157)

What's Updated

- ✓ Freddie Mac UCD submissions no longer accept the security section in the UCD XML (including username and password).

- Authentication is now managed via OAuth 2.0., where requests include an OAuth access token in the HTTP header.
- Transport is moving from SOAP to REST (HTTP POST) while the payload remains XML.

Purpose

- This update enhances security by removing credentials from the XML payload and standardizing on OAuth 2.0.

What Changed

- Removed security section in the UCD XML (username/password).
- Added OAuth 2.0 authentication. Include a valid access token in the request header.

Scope

- Applies to Freddie Mac UCD only. (No changes to other destinations.)

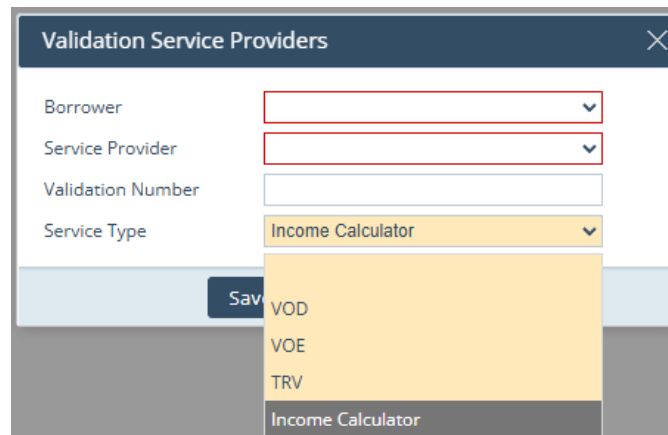
AUS Screen > Desktop Underwriter Tab

Validation Service Providers Lightbox

Service Type Update (51216)

What's New

- ✓ Updated the *Service Type* dropdown by adding **Income Calculator** as an option.

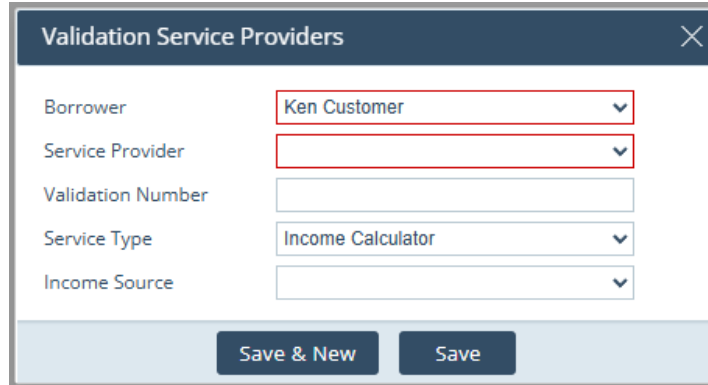


Purpose

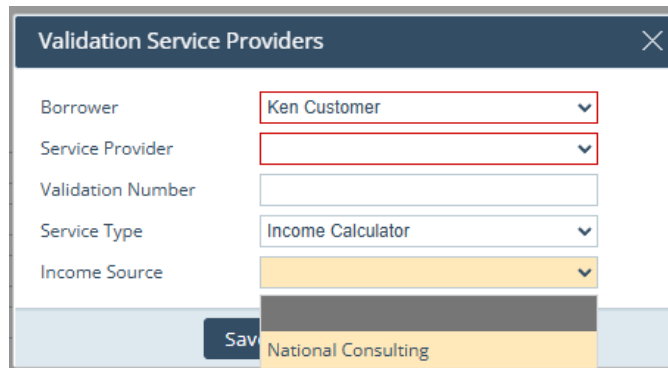
- To support Fannie Mae DU 1.9.1 specification.

Usage

- When the *Borrower* is selected and *Service Type* = **Income Calculator**, the **Income Source** dropdown is displayed.

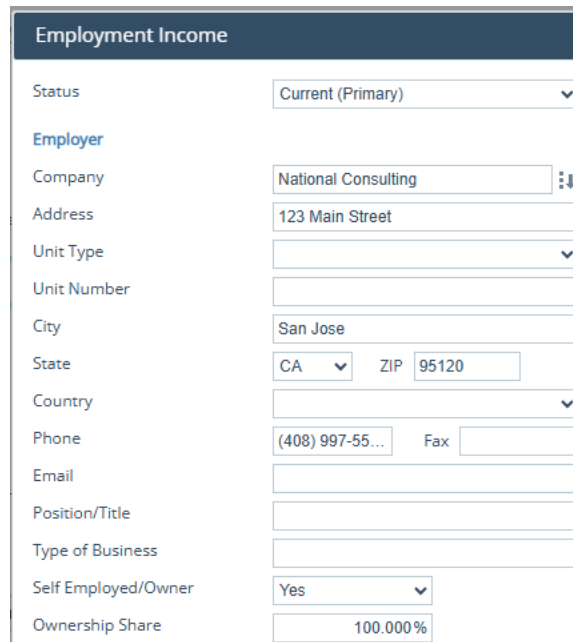


- The **Income Source** dropdown displays the source(s) of the borrower’s self-employment income.



Note

- The self-employment income is indicated when the *Self Employed* dropdown = *Yes*, in the *Employment Income* lightbox (*Production > Borrower* screen).



- The option(s) displayed in the **Income Source** dropdown = the *Company* field in the *Employment Income* lightbox.

- Additional option(s) in the **Income Source** dropdown can also come from any REO that the borrower owns.
 - This is indicated when any value greater than zero is entered in either the *Gross Rental Income* or *Net Rental Income/Subject Property Cash Flow* fields in the *Property You Own* lightbox (*Production > Borrower* screen).

AUS Screen > Loan Product Advisor (URLA) Tab


Account Information Section

FHA/VA Originator ID Update (51725)

What's Updated

- ✓ The *FHA/VA Originator ID* field is always enabled now.

Account Information

Seller Servicer Number	<input type="text"/>
Loan Product Advisor User ID	<input type="text" value="shibani"/>
Loan Product Advisor Password	<input type="password" value="....."/> 
FHA/VA Originator ID	<input type="text"/>
Lender Branch Number	<input type="text"/>
Third Party Originator (TPO) Number	<input type="text"/>
Non-Originating Third Party (NTPO) Number	<input type="text"/>
Save Password	<input type="checkbox"/>

Purpose

- Previously, this field was disabled along with the login fields, when the *Disable Login* box was checked in *Configuration > Business Units > Interfaces*.
- Now, this field is always enabled to allow users to enter this information, while the login credential fields remain disabled (read only) when the *Disable Login* box is checked in *Configuration > Business Units > Interfaces*.

Submission Information Section

Return Conditions Checkbox (50018)

What's New

- ✓ Added a **Return Conditions** checkbox that, when enabled, automatically imports conditions from LPA findings into the loan's *Conditions* activity.

Submission Information

Key Number

Loan ID

LPA Transaction ID

LPA Transaction Number

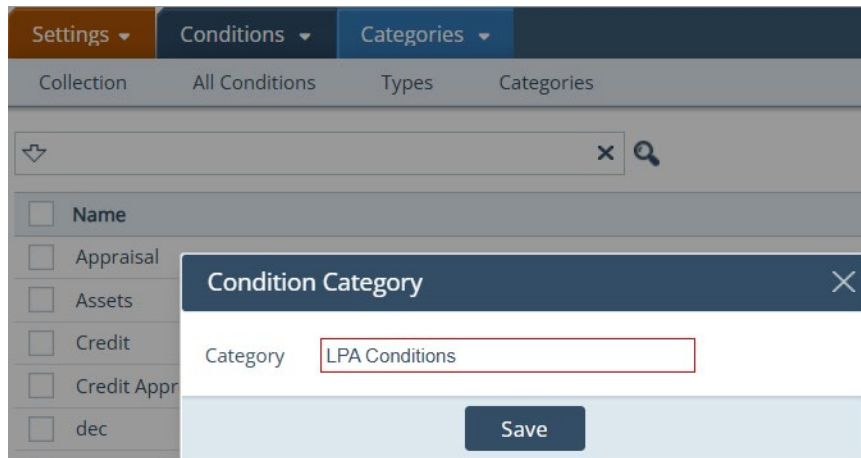
Return Conditions

Purpose and Usage

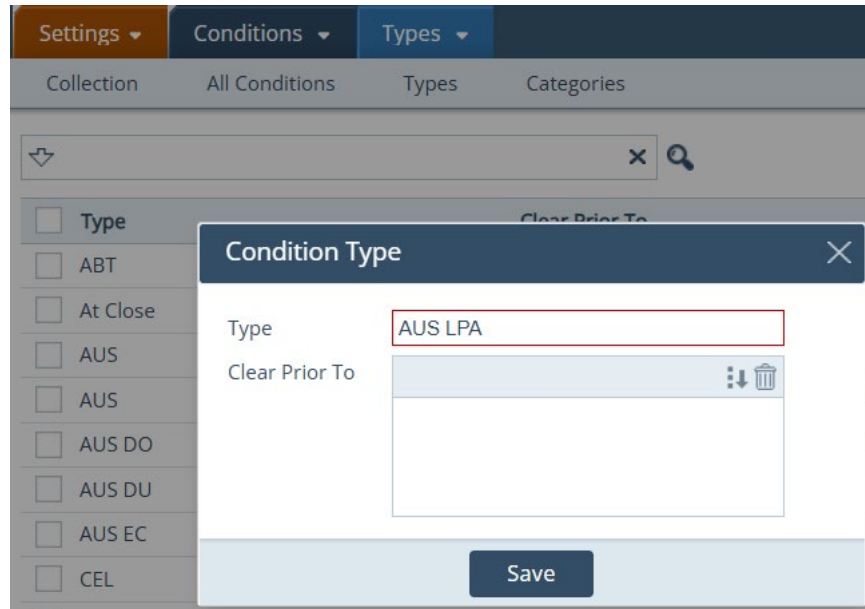
- Enable auto-import—select **Return Conditions** to pull conditions from LPA findings into Loans > Conditions.
- Disable auto-import—leave the checkbox cleared to prevent LPA conditions from being imported.

Important (Prerequisite Setup)

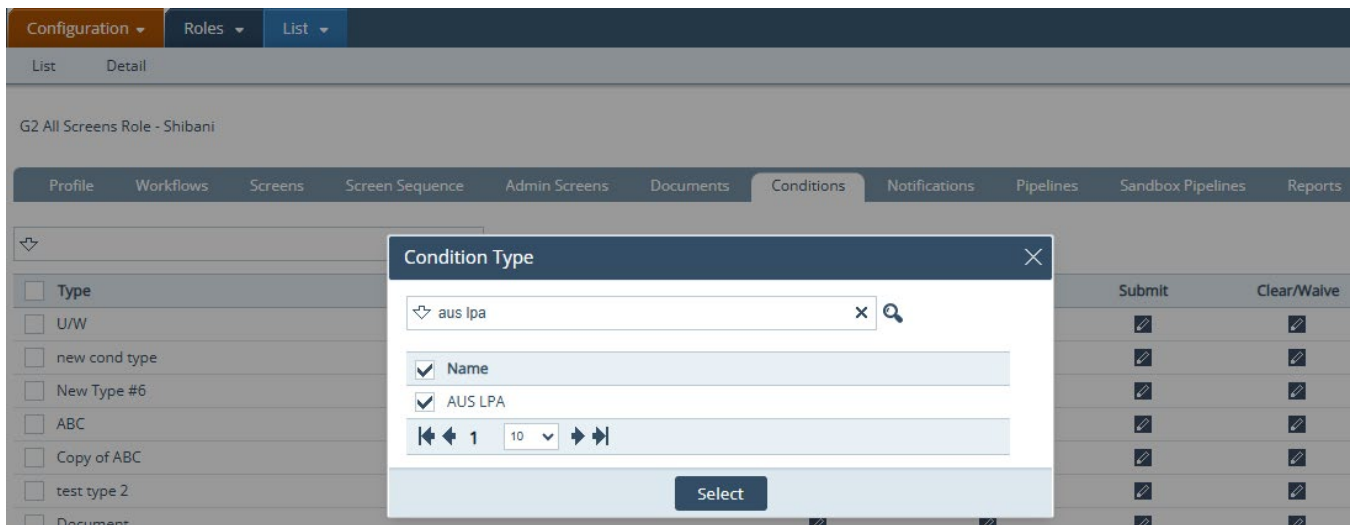
- For this feature to work, a system administrator must create the following exact entries in *Settings > Conditions* (spelling and spacing must match exactly) and *Configuration > Roles*:
 1. Add the condition category “LPA Conditions” in *Settings > Conditions > Categories*



2. Add the condition type “AUS LPA” in *Settings > Conditions > Types*



3. Add “AUS LPA” to the selected role in *Configuration > Roles > Conditions*.



- If any of the above steps fail to be satisfied and if either the category or type is missing or misspelled, LPA conditions will not import into the *Conditions* activity.

Lock

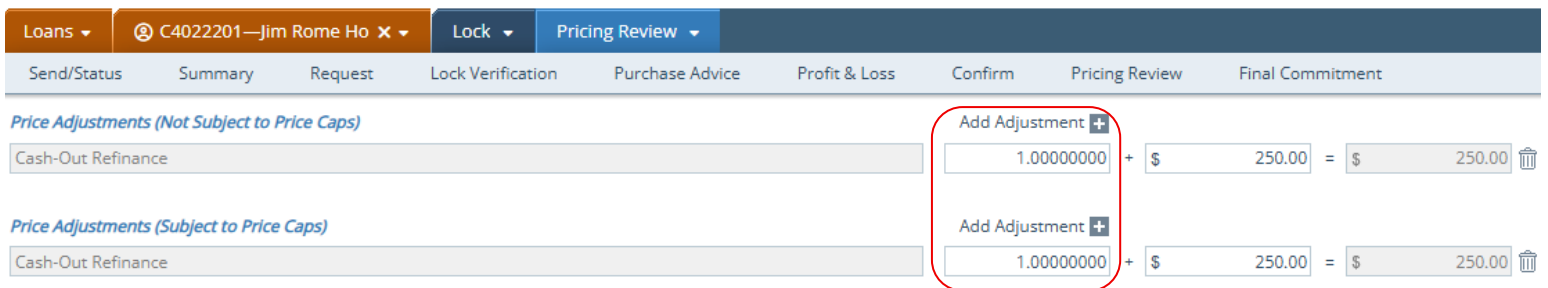
Pricing Review Screen

Buy Side Price Section

Add Adjustment Update (50845)

What's Updated

- ✓ Updated the Add Adjustment fields to display up to 8 decimal places.



The screenshot shows the 'Pricing Review' tab in a software interface. It displays two sections for 'Price Adjustments'. The first section is 'Price Adjustments (Not Subject to Price Caps)' and the second is 'Price Adjustments (Subject to Price Caps)'. Each section contains a 'Cash-Out Refinance' entry. In both sections, the 'Add Adjustment' field is highlighted with a red box and contains the value '1.00000000'. The calculation shown is: 1.00000000 + \$ 250.00 = \$ 250.00. A trash icon is visible to the right of each calculation.

Multiple Sections

Copy Icon Information (51864)

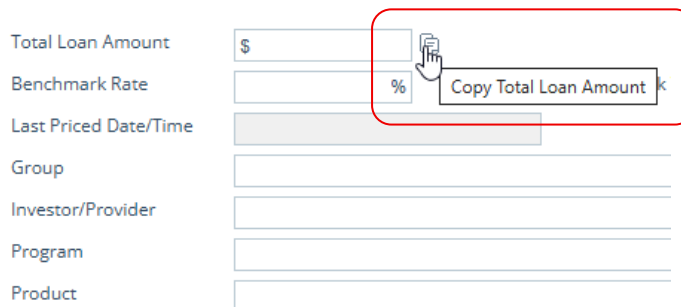
What's Updated

- ✓ Added the tooltip textbox, which displays information about what the copy icon does, when the cursor is hovered above the copy icon.

Scope

- The tooltip textbox applies to the following fields:
 - *Total Loan Amount* (copies from the corresponding field on *Productions > Product & Pricing* screen)

Benchmark Price




The screenshot shows a form with several fields. The 'Total Loan Amount' field is highlighted with a red box. A tooltip is displayed over the copy icon in this field, containing the text 'Copy Total Loan Amount'. The other fields are: Benchmark Rate (with a percentage sign), Last Priced Date/Time, Group, Investor/Provider, Program, and Product.

- *Anticipated Principal Amount Purchased*

Sell Side Price

Anticipated Sell Price

Anticipated Principal Amount Purchased  **Copy Total Loan Amount**

Commitment Rate Commitment Term

Commitment Type

Last Priced Date/Time

Group Group ID

Investor/Provider Investor/Pr

- *Principal Amount Purchased*


Realized Sell Price

Group Group ID

Investor/Provider Investor/Pr

Program Program ID

Product Product ID

Principal Amount Purchased  **Copy Total Loan Amount**

Commitment Rate Commitment Term

Commitment Type

- When there is an *Unpaid Principal Balance* (from *Production > ULDD* screen), then the tooltip textbox clarifies that it is copying the *Unpaid Principal Balance*.


Realized Sell Price

Group Group ID

Investor/Provider Investor/Provider

Program Program ID

Product Product ID

Principal Amount Purchased  **Copy Unpaid Principal Balance**

Commitment Rate Commitment Term

Profit & Loss Screen

Buy Side Price Section

Commission Values Update (51688)

What's Updated

- ✓ Updated the values for the *Commissions* table/lightboxes to display positive values.

Loans					C6021201—Jim Rome Ho					Profit & Loss																																		
Send/Status					Summary					Request					Lock Verification					Purchase Advice					Profit & Loss					Confirm					Pricing Review					Final Commitment				
Commissions										Commissions Total										\$ 6,000.00																								
<input type="checkbox"/>	Name	Role	Commission %	Additional Comp											Amount																													
<input type="checkbox"/>	Shibani Bagga	G2 All Screens Role - Shibani	50.000 %	\$ 6,000.00											\$ 6,000.00																													
										Gross Buy Side Total (Realized Buy Price + Lender Debits & Credits + Commissions)										\$ 6,250.00																								
										Net Buy Side Total (Gross Buy Side Total - Total Loan Amount)										\$ 6,250.00																								

- Previously, the commission amounts were displayed as negative values, which caused confusion.

Loans					817550379—Alice Firstimer					Profit & Loss																																		
Send/Status					Summary					Request					Lock Verification					Purchase Advice					Profit & Loss					Confirm					Pricing Review					Final Commitment				
Commissions										Commissions Total										\$ -6,000.00																								
<input type="checkbox"/>	Name	Role	Commission %	Additional Comp											Amount																													
<input type="checkbox"/>	Anitha New	All Loan Originator	50.000 %	\$ 6,000.00											\$ -6,000.00																													
										Gross Buy Side Total (Realized Buy Price + Lender Debits & Credits + Commissions)										\$ -6,000.00																								
										Net Buy Side Total (Gross Buy Side Total - Total Loan Amount)										\$ -6,000.00																								

- Also removed the text/wording about commissions expressed in negative values from the lightbox.

Warehouse Section

New and Updated Fields (51235, 51771, 51772, 51769)

What's Updated

- ✓ *Warehouse Haircut Amount* has been relabeled to **Warehouse Interest Amount**, and its calculation has been updated.
 - Field ID changed from *ProfitLossTotal.WarehouseHairCutAmount* to **ProfitLossTotal.WarehouseInterestAmount**.
- ✓ Added **Warehouse Amount** (used in the calculation for **Warehouse Interest Amount**).
- ✓ *Warehouse Total* is now calculated as **Warehouse Interest Amount** + *Additional Charges Total*.
 - *Warehouse Per Diem* has been removed from this calculation.

Warehouse

										Warehouse Total (Warehouse Interest Amount + Additional Charges Total)										\$ 3,750.00																			
Warehouse Amount					\$ 300,000.00																																		
Interest Rate					3.000%					Interest Basis					360					Warehoused Days					30					Warehouse Interest Amount					\$ 750.00				
Additional Charges										Additional Charges Total										\$ 3,000.00																			
<input type="checkbox"/>	Name	Paid By	Paid To											Amount																									
<input type="checkbox"/>	Additional Charge	Borrower	Broker											\$ 3,000.00																									

Purpose and Usage

- Enter **Warehouse Amount** and *Warehoused Days*; together with *Interest Rate* and *Interest Basis*, the system calculates **Warehouse Interest Amount**.
- *Warehouse Total* at the top of the section reflects **Warehouse Interest Amount** + *Additional Charges Total*.

Formulas (for reference)

- **Warehouse Interest Amount** = **Warehouse Amount** × (*Interest Rate* ÷ *Interest Basis*) × *Warehoused Days*
- *Warehouse Total* = **Warehouse Interest Amount** + *Additional Charges Total*

Example (as shown)

- **Warehouse Amount:** \$300,000.00
- *Interest Rate:* 3.000%
- *Interest Basis:* 360
- *Warehoused Days:* 30
 - **Warehouse Interest Amount:** \$750.00
- *Additional Charges Total:* \$3,000.00
- *Warehouse Total:* \$3,750.00

Multiple Sections and Lightboxes

Removal of Paid To and Paid By Fields (51862)

What's Updated

- ✓ Removed all *Paid To* and *Paid By* fields/columns, as these fields/columns are not used for and irrelevant to *Profit & Loss* information.

Scope

- The *Paid To* and *Paid By* fields/columns are removed from the following tables and lightboxes:
 - *Lender Debits & Credits* table
 - *Add/Edit Lender Debit or Credit* lightbox
 - *Select Lender Debits or Credits* lightbox
 - *Additional Charges* table
 - *Add/Edit Warehouse Additional Charges* lightbox
 - *Investor Debits & Credits* table
 - *Add/Edit Investor Debit or Credit* lightbox
 - *Select Investor Debits or Credits* lightbox

Production

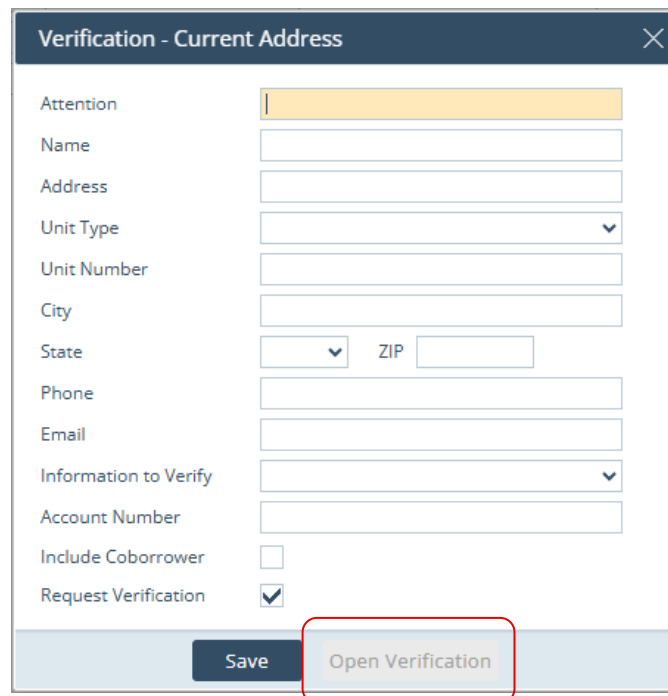
Borrower Screen

Multiple Lightboxes

Open Verification Button Update (48815)

What's Updated

- ✓ Updated the *Open Verification* button in all lightboxes that include this functionality. This button is now disabled for roles that do not have access to the *Verifications* screen.



The screenshot shows a lightbox titled "Verification - Current Address" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Attention: Text input field
- Name: Text input field
- Address: Text input field
- Unit Type: Dropdown menu
- Unit Number: Text input field
- City: Text input field
- State: Dropdown menu, ZIP: Text input field
- Phone: Text input field
- Email: Text input field
- Information to Verify: Dropdown menu
- Account Number: Text input field
- Include Coborrower:
- Request Verification:

At the bottom of the lightbox, there are two buttons: "Save" and "Open Verification". The "Open Verification" button is highlighted with a red rectangular box, indicating it is disabled.

Purpose

- Previously, roles without access to the *Verifications* screen could still reach its features via the *Open Verification* button in the lightboxes, bypassing role restrictions.
- With this update, those roles are prevented from accessing the *Verification* lightbox (core feature of the *Verifications* screen) because the *Open Verification* button is disabled for them.

Scope

- The following lightboxes are impacted by this update:
 - *Verification – Current Address*
 - *Employment Income*
 - *Other Income*

- *Bank Accounts, Retirement and Other Accounts*
- *Credit Cards, Other Debts and Leases*
- *Real Estate Liabilities*

Note

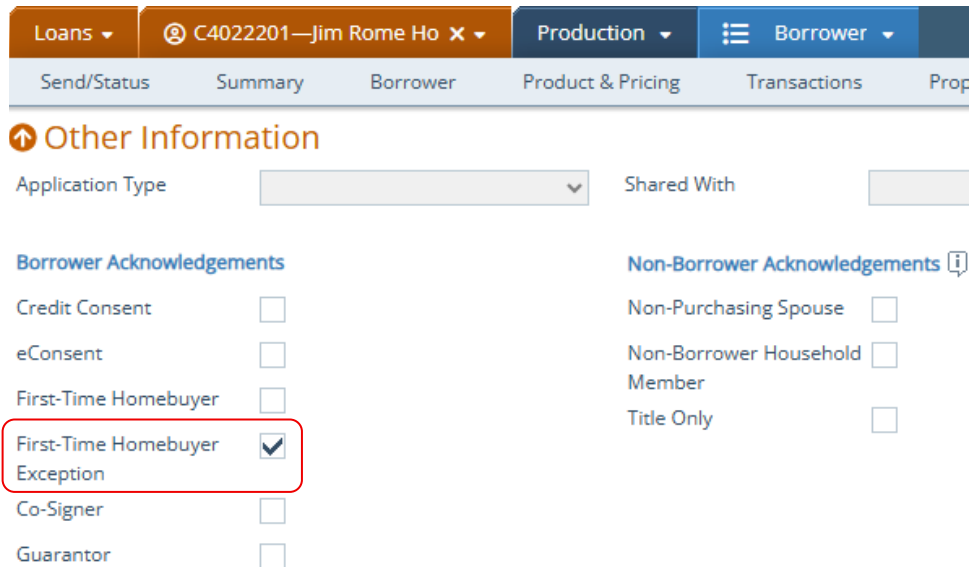
The administrator can enable or disable a role’s access to the *Verifications* screen in *Configuration > Roles > Screens*.

Other Information Section

First-Time Homebuyer Exception Checkbox (51181)

What’s New

- ✓ Added the new **First-Time Homebuyer Exception** checkbox, to support Fannie Mae DU Spec Version 1.9.1.



The screenshot shows a software interface with a navigation bar at the top containing 'Loans', 'C4022201—Jim Rome Ho', 'Production', and 'Borrower'. Below the navigation bar are tabs for 'Send/Status', 'Summary', 'Borrower', 'Product & Pricing', 'Transactions', and 'Prop'. The main content area is titled 'Other Information' and contains several sections:

- Application Type**: A dropdown menu.
- Shared With**: A text input field.
- Borrower Acknowledgements**: A list of checkboxes including 'Credit Consent', 'eConsent', 'First-Time Homebuyer', 'First-Time Homebuyer Exception' (checked and highlighted with a red box), 'Co-Signer', and 'Guarantor'.
- Non-Borrower Acknowledgements**: A list of checkboxes including 'Non-Purchasing Spouse', 'Non-Borrower Household Member', and 'Title Only'.

Property Screen

Subject Property Information Section

Number of Stories Field (51525)

What’s New

- ✓ Added the **Number of Stories** field, for ease of entry of this information.

Loans ▾	C4022201—Jim Rome Ho ✕ ▾	Production ▾	Property ▾	
Send/Status	Summary	Borrower	Product & Pricing	Transactions
			Property	Closing Co

Subject Property Information

Prequalification	<input type="checkbox"/> Same as Current Address	Property Type	CondoHotel ▾
Address	2225 Main ave	Attachment Type	Semi-Detached ▾
Unit Type	Condo ▾	Number of Stories	5
Unit Number		Number of Units	10
		Year Built	1999

- This field matches (and syncs with) the corresponding field on the *Product & Pricing* screen > *Pricing Search Parameters* lightbox.

Seller Section > Add/Edit Seller Lightbox

Same Address as Subject Property Checkbox (49951)

What's New

- ✓ Added the **Same Address as Subject Property** checkbox.

Add Seller ✕

Seller Is a Legal Entity/Trust	<input type="checkbox"/>	Same Address as Subject Property	<input checked="" type="checkbox"/>
Legal Entity	<input type="text"/>		
Seller First Name	<input type="text"/>		
Seller Middle Name	<input type="text"/>		
Seller Last Name	<input type="text"/>		
Seller Suffix	<input type="text"/>		
Address	2225 Main ave		
Unit Type	Condo ▾		
Unit Number	<input type="text"/>		
City	Newark		
State	▾	ZIP	94560
Country	United States ▾		
Phone Number	<input type="text"/>		
Email	<input type="text"/>		

Purpose and Usage

- Select this checkbox to auto-populate the seller's address when it is also the subject property's address.

Appraisals Screen

Uniform Residential Appraisal Report (51494)

What's New

- ✓ Added **Uniform Residential Appraisal Report** as a new option in the *Appraisal From* dropdown.

Purpose

- To support the new UAD 3.6 appraisal format.
- The legacy forms will continue to be listed to support UAD 2.6 format.

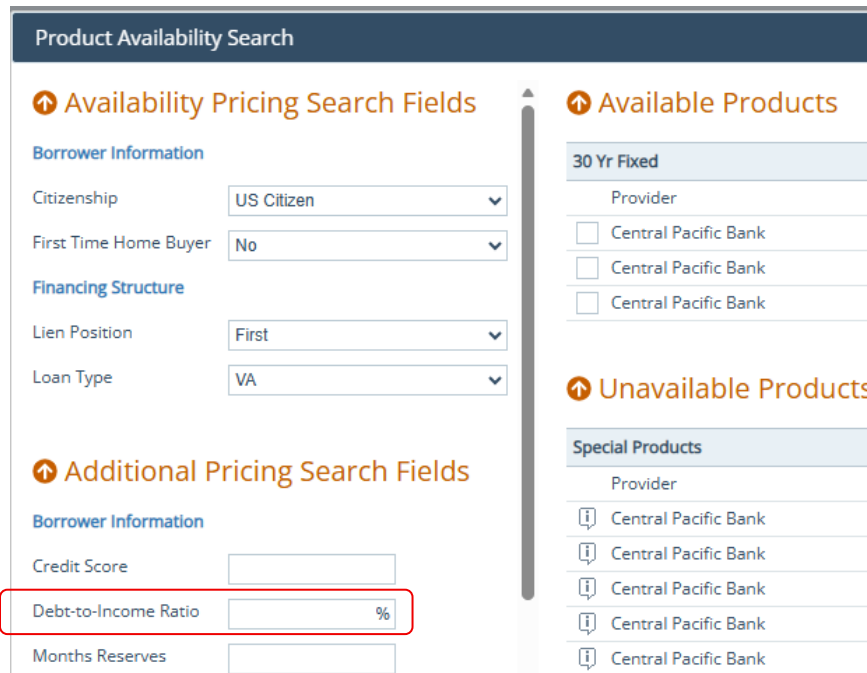
Product & Pricing Screen

Product Availability Search and Pricing Search Parameters Lightboxes

DTI Fields Update (51720)

What's Updated

- ✓ Updated the DTI-related fields to always be editable
 - *Product Availability Search > Debt-to-Income Ratio.*



The screenshot shows a lightbox titled "Product Availability Search" with two main sections: "Availability Pricing Search Fields" and "Additional Pricing Search Fields".

Availability Pricing Search Fields:

- Borrower Information:**
 - Citizenship: US Citizen (dropdown)
 - First Time Home Buyer: No (dropdown)
- Financing Structure:**
 - Lien Position: First (dropdown)
 - Loan Type: VA (dropdown)

Additional Pricing Search Fields:

- Borrower Information:**
 - Credit Score: [input field]
 - Debt-to-Income Ratio:** [input field] % (highlighted with a red box)
 - Months Reserves: [input field]

Available Products:

- 30 Yr Fixed:**
 - Provider:
 - Central Pacific Bank
 - Central Pacific Bank
 - Central Pacific Bank

Unavailable Products:

- Special Products:**
 - Provider:
 - Central Pacific Bank
 - Central Pacific Bank
 - Central Pacific Bank
 - Central Pacific Bank
 - Central Pacific Bank

- *Pricing Search Parameters > Total Obligations*

Pricing Search Parameters

Pricing		Loan Information	
Lock Period	<input type="text" value="30"/>	Base Loan Amount	<input type="text" value="\$ 0.00"/>
Lock Type	<input type="text"/>	UFMIP/FF Financed/ Borrower FF	<input type="text" value="\$ 0.00"/>
Search by Type	<input type="text" value="Price"/>	Total Loan Amount	<input type="text" value="\$"/>
Desired Price	<input type="text" value="100.00000000"/>	Purchase Price	<input type="text" value="\$"/>
Desired Note Rate	<input type="text" value="0.000%"/>	Appraised Value	<input type="text" value="\$"/>
Price Result Format	<input type="text" value="Price"/>	Subordinate Financing	<input type="text" value="\$ 0.00"/>
Broker Comp Paid by	<input type="text" value="Lender Paid"/>	Refinance Cash-Out Amount	<input type="text" value="\$ 0.00"/>
Product & Payment Information		Undrawn HELOC Amount	<input type="text" value="\$"/>
Amortization Type	<input type="text" value="Fixed"/>	Base LTV/CLTV	<input type="text" value="0.000%"/> <input type="text" value="0.000%"/>
ARM First Adjustment	<input type="text"/>	Total LTV/CLTV	<input type="text" value="0.000%"/> <input type="text" value="0.000%"/>
Product Type	<input type="text"/>	HCLTV	<input type="text" value="0.000%"/>
Prepayment Term (Months)	<input type="text"/>	Months Reserves	<input type="text" value="0"/>
Waive Escrow(s)	<input type="checkbox"/> Conforming <input type="checkbox"/>		
Interest Only	<input type="checkbox"/> Non-Conforming <input checked="" type="checkbox"/>		
HELOC	<input type="checkbox"/> Non-Prime <input checked="" type="checkbox"/>		
Mortgage Insurance		Borrower Information	
MI Premium Paid in Cash	<input type="text" value="\$ 0.00"/>	Credit Score	<input type="text" value="0"/>
MI Provider	<input type="text"/>	Total Monthly Income	<input type="text" value="\$ 0.00"/>
MI Premium Plan	<input type="text"/>	Total Obligations	<input type="text" value=""/>
MI Paid By	<input type="text"/>	Citizenship	<input type="text" value="US Citizen"/>

Note

- This update also applies to the same fields and lightboxes in *Lock*.

ULDD Screen

Note Information Section

Loan Maturity Date Update (51680)

What's Updated

- ✓ Updated the calculations for the *Loan Maturity Date* field for HELOC loans to be based on the *Note Date* instead of the *First Payment Date*.

FHA Screen > Loan Transmittal and FHA Appraisal Analysis Tabs

Reviewer of Appraisal Field (51567)

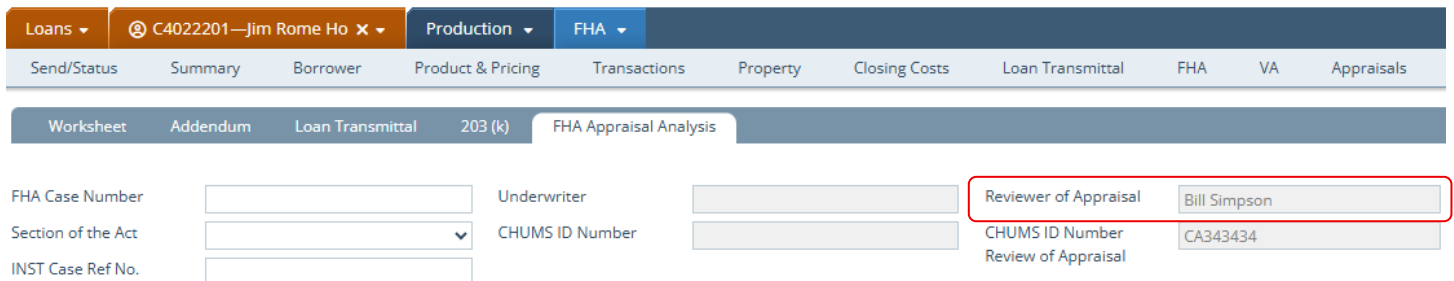
What's New

- ✓ Added the *Reviewer of Appraisal* field on the *Loan Transmittal* tab, to enter the name of the reviewer of the appraisal.



The screenshot shows the 'Loan Transmittal' tab selected. On the right side, under the 'Risk Assessment' section, the 'Reviewer of Appraisal' field is highlighted with a red box and contains the text 'Bill Simpson'. Other fields include 'Number Months Reserves' (-59), 'Seller Contribution' (0.000%), 'Edit Borrower Funds to Close' (checkbox), 'Scored by Total' (dropdown), 'FHA TOTAL Risk Class' (dropdown), 'CHUMS ID Number' (CA343434), and 'Review of Appraisal'.

- ✓ This field is also added on the *FHA Appraisal Analysis* tab, but read-only.



The screenshot shows the 'FHA Appraisal Analysis' tab selected. On the right side, the 'Reviewer of Appraisal' field is highlighted with a red box and contains the text 'Bill Simpson'. Other fields include 'FHA Case Number', 'Section of the Act', 'INST Case Ref No.', 'Underwriter', 'CHUMS ID Number', and 'Review of Appraisal'.

Purpose

- This field is added for scenarios where the underwriter and the appraisal reviewer are different people.
- This new field maps to and prints on the HUD-54114 form.

Note

This update also resolve IFR items 49671 and 49672.

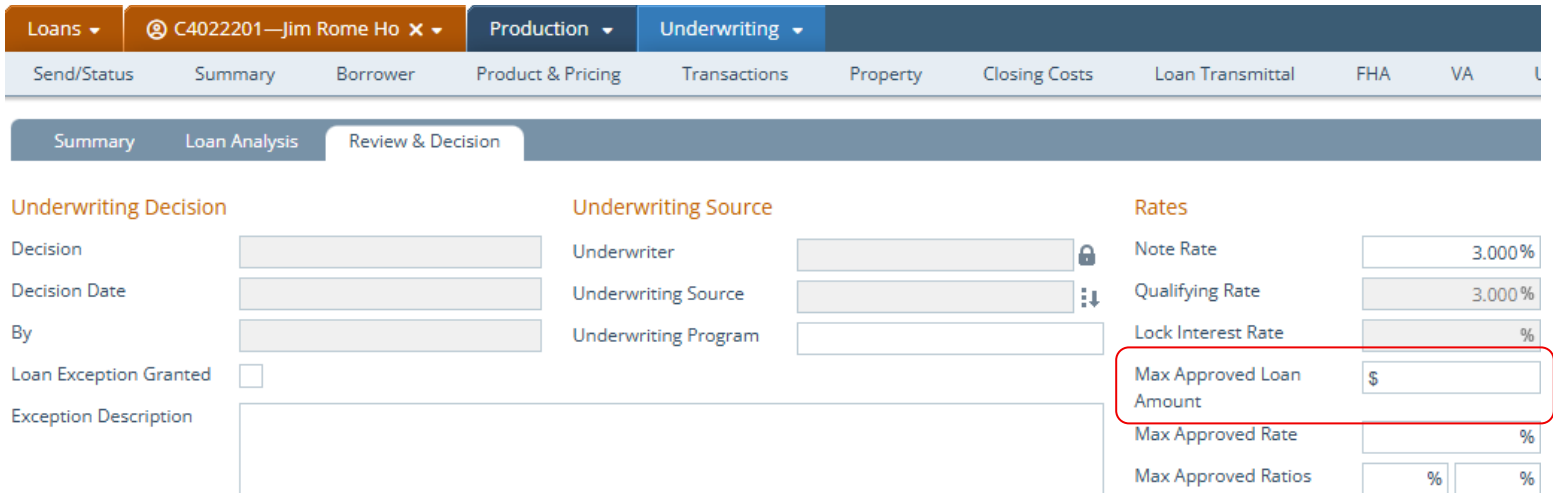
Underwriting Screen > Review and Decision Tab

Rates Section

Max Approved Loan Amount Field (51272)

What's New

- ✓ Added the **Max Approved Loan Amount** field.



Underwriting Decision		Underwriting Source		Rates	
Decision	<input type="text"/>	Underwriter	<input type="text"/>	Note Rate	3.000%
Decision Date	<input type="text"/>	Underwriting Source	<input type="text"/>	Qualifying Rate	3.000%
By	<input type="text"/>	Underwriting Program	<input type="text"/>	Lock Interest Rate	%
Loan Exception Granted	<input type="checkbox"/>			Max Approved Loan Amount	\$
Exception Description	<input type="text"/>			Max Approved Rate	%
				Max Approved Ratios	% %

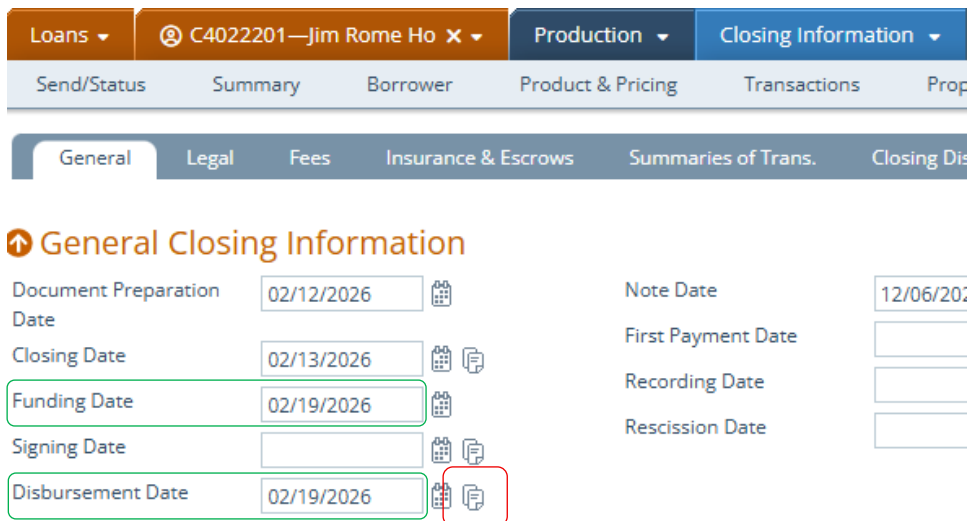
Closing Information Screen > General Tab

General Closing Information Section

Disbursement Date Copy Icon (50187)

What's New

- ✓ Added the copy icon to the *Disbursement Date* field, which copies the *Funding Date*, useful for situations when the two dates are the same.



General Closing Information	
Document Preparation Date	02/12/2026
Closing Date	02/13/2026
Funding Date	02/19/2026
Signing Date	
Disbursement Date	02/19/2026
Note Date	12/06/2026
First Payment Date	
Recording Date	
Rescission Date	

Note Date Copy Icon (50908)

What's New

- ✓ Added the copy icon to the *Note Date* field, which copies the *Closing Date*, useful for situations when the two dates are the same.

Loans ▾ C4022201—Jim Rome Ho ✕ ▾ Production ▾ Closing Information ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Clos

General Legal Fees Insurance & Escrows Summaries of Trans. Closing Disclosure W

↑ General Closing Information

Document Preparation Date	<input type="text" value="02/12/2026"/>		Note Date	<input type="text" value="02/13/2026"/>	
Closing Date	<input type="text" value="02/13/2026"/>		First Payment Date	<input type="text"/>	
Funding Date	<input type="text" value="02/19/2026"/>		Recording Date	<input type="text"/>	
Signing Date	<input type="text"/>		Rescission Date	<input type="text"/>	
Disbursement Date	<input type="text" value="02/19/2026"/>				

Closing Information Screen > Wire & Funding Tab

Wire Calculation Section

Addition Table Update (51669)

What's Updated

- ✓ Lender-paid fees (*Paid By = Lender* in the fee's lightbox) are now populated in the *Addition* table.

Loans ▾ C4022201—Jim Rome Ho ✕ ▾ Production ▾ Closing Information ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs Loan Transmittal FHA VA Closing Informat

General Legal Fees Insurance & Escrows Summaries of Trans. Closing Disclosure Wire & Funding Verify Employment Payoffs/Payments Additiona

↑ Wire Calculation

<input type="checkbox"/> Deduction	Amount		<input type="checkbox"/> Addition	Amount	
No records			<input type="checkbox"/> Administration Fee	\$ 1,000.00	

Requirement

- For a fee to appear in the *Addition* table, both of the following must be true in the fee's lightbox:
 - The *Withhold from Wire* checkbox is selected
 - *Paid By = Lender*

Note

If either condition is not met, the fee will not populate the *Addition* table.

Origination Charges ✕

Fee Name: Administration Fee ⌵

Fee Type: Administration Fee ⌵

Custom Fee:

Paid To: Lender ⌵

Company: ⌵

Percent: 0.000000%

Based On: Base Loan Amount ⌵

Adjustment Amount: \$ 1,000.00

Total Amount: \$ 1,000.00

Maximum Amount: \$ 1,000.00

Paid By: Lender ⌵

Responsible Party: ⌵

APR: Withhold from Wire

POC: Federal Bona Fide

Financed: GSE Bona Fide

FHA Allowable: State Bona Fide

Quote Screen > General Tab

Credit Report Date Section

Representative Credit Score Update (51420)

What's Updated

- ✓ Moved the *Representative Credit Score* from the table (as a column) to above of the table (as a field).

Loans ▾ C4022201—Jim Rome Ho ✕ ▾ Production ▾ Quote ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs Loan Transmittal FHA VA Appraisals

☰ General Loan Comparison

📄 **Credit Report Data** Representative Credit Score Credit Report Date Credit Report Expires ⬇ ⬆ 🗑 +

Borrower	Credit Reference Number	Experian	Equifax	TransUnion	Median
<input type="checkbox"/> Jim Rome Ho		756	765	754	756

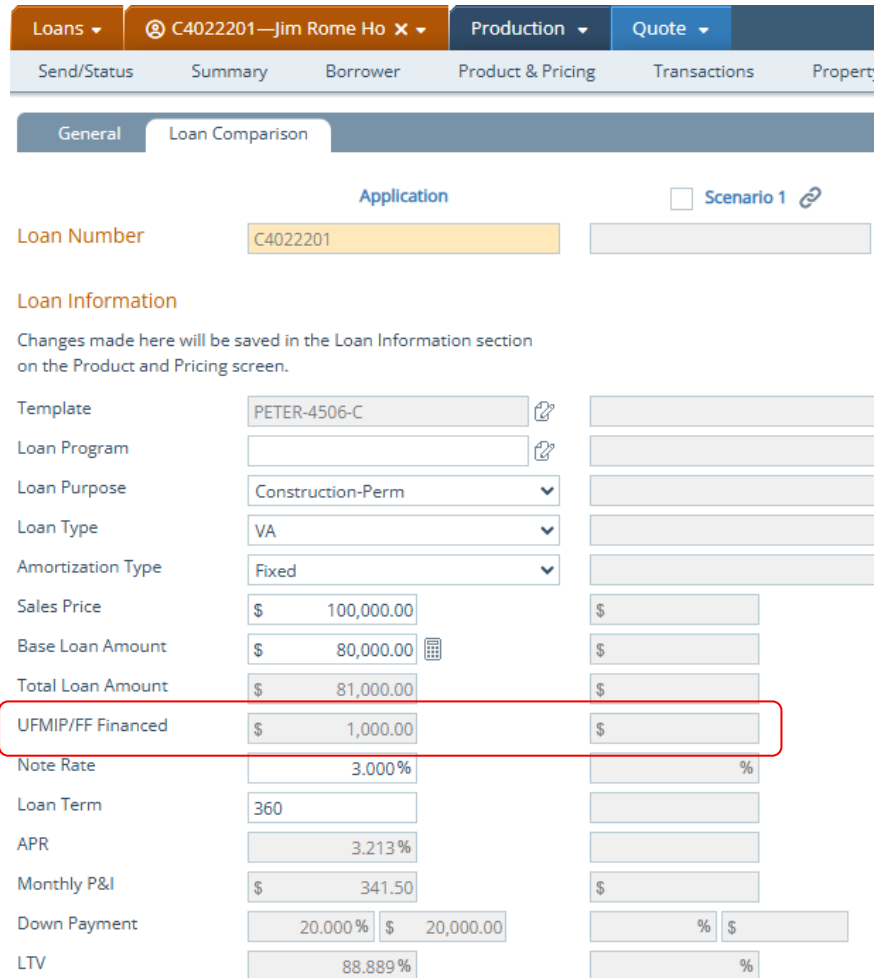
Quote Screen > Loan Comparison Tab

Loan Information Section

UFMIP/FF Financed Field (51620)

What's New

- ✓ Added the **UFMIP/FF Financed** field.



The screenshot shows the 'Loan Comparison' tab in the 'Quote' screen. The 'UFMIP/FF Financed' field is highlighted with a red box. The field is currently set to \$ 1,000.00. The corresponding field on the 'Product & Pricing' screen is currently empty.

Field	Value	Product & Pricing Value
Loan Number	C4022201	
Loan Information	Changes made here will be saved in the Loan Information section on the Product and Pricing screen.	
Template	PETER-4506-C	
Loan Program		
Loan Purpose	Construction-Perm	
Loan Type	VA	
Amortization Type	Fixed	
Sales Price	\$ 100,000.00	\$
Base Loan Amount	\$ 80,000.00	\$
Total Loan Amount	\$ 81,000.00	\$
UFMIP/FF Financed	\$ 1,000.00	\$
Note Rate	3.000%	%
Loan Term	360	
APR	3.213%	
Monthly P&I	\$ 341.50	\$
Down Payment	20.000% \$ 20,000.00	% \$
LTV	88.889%	%

- This field matches and syncs with the corresponding field on the *Product & Pricing* screen.

Ratios Section

New Fields (50539)

- ✓ Added the following fields:
 - **First Mortgage (P&I)**
 - **Subordinate Lien(s) (P&I)**

- Homeowner's Insurance
- Supplemental Property Insurance
- Property Taxes
- Mortgage Insurance
- Association/Project Dues
- Other

Loans ▾	C4022201—Jim Rome Ho × ▾	Production ▾	Quote ▾
Send/Status	Summary	Borrower	Product & Pricing
Transactions			
General			
Loan Comparison			
Ratios			
Total Monthly Income	\$ 0.00		\$
First Mortgage (P&I)	\$ 341.50		\$
Subordinate Lien(s) (P&I)	\$ 0.00		\$
Homeowner's Insurance	\$ 0.00		\$
Supplemental Property Insurance	\$ 0.00		\$
Property Taxes	\$ 0.00		\$
Mortgage Insurance	\$ 0.00		\$
Association/Project Dues	\$		\$
Other	\$ 0.00		\$
Total Primary Housing Expense	\$ 0.00		\$
Total Other Obligations	\$ 0.00		\$
Housing Expense Ratio	%		%
DTI Ratio	%		%

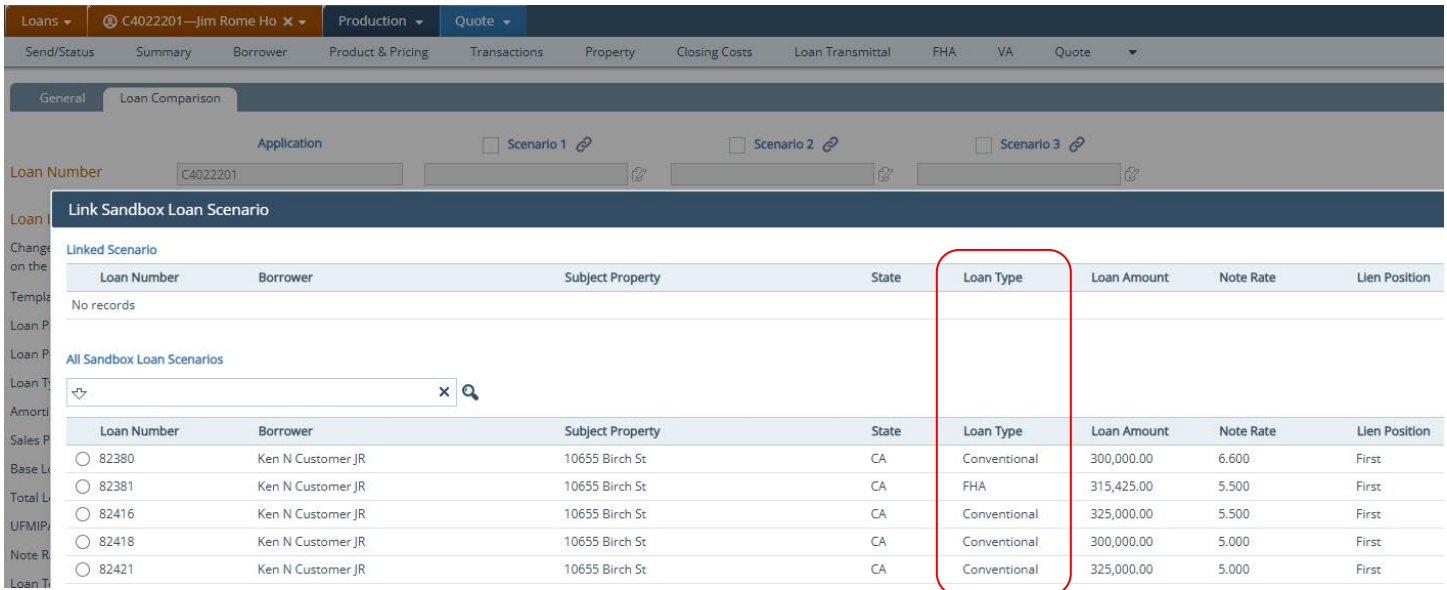
- These fields matches with the corresponding fields on the *Transactions* screen > *Proposed Monthly Payment* section.
- Only the first column displays synced loan data. The other three columns display the loan scenario data from linked loans from the *Sandbox*.

Link Sandbox Loan Scenario Lightbox

Loan Type Column (51622)

What's New

- ✓ Added the **Loan Type** column.



Loan Number	Borrower	Subject Property	State	Loan Type	Loan Amount	Note Rate	Lien Position
No records							
All Sandbox Loan Scenarios							
82380	Ken N Customer JR	10655 Birch St	CA	Conventional	300,000.00	6.600	First
82381	Ken N Customer JR	10655 Birch St	CA	FHA	315,425.00	5.500	First
82416	Ken N Customer JR	10655 Birch St	CA	Conventional	325,000.00	5.500	First
82418	Ken N Customer JR	10655 Birch St	CA	Conventional	300,000.00	5.000	First
82421	Ken N Customer JR	10655 Birch St	CA	Conventional	325,000.00	5.000	First

Production and Interfaces

Path POS (Zip) Import

Construction/Land Loans Import Update (51563)

What's Updated

- ✓ Updated the import of loans from Path POS (Zip) to capture construction and land loan data.

Details

- The Zip borrower interview now includes new questions about construction loans and land loans.
- These questions and answers are mapped to the relevant fields in Path on the *Loans > Production > Construction* and *Loans > Production > Property* screens.
- If borrowers answer these construction/land loan questions, their responses automatically populate the corresponding fields on the *Construction* and *Property* screens upon import.

Fannie Mae Screen and DO/DU M3.4 Tabs

Borrower and Joint With Update (51383)

What's Updated

- ✓ The *Borrower* and *Joint With* columns are now automatically populated with the names of borrower one and borrower two (if a second borrower exists) whenever a credit report is successfully pulled.

Scope

- This update applies to the *Borrower* and *Joint With* columns on the *Production > Fannie Mae* screen and the *Interfaces > AUS > Desktop Originator M3.4* and *Desktop Underwriter M3.4* tabs.

Why This Matters

- This update is helpful for lenders that do not use the Fannie Mae DO/DU interfaces but still need to export a ULAD (Fannie Mae) file from a Path loan with married borrowers.
- Previously, the ULAD export would not detect the marital relationship unless the *Borrower* and *Joint With* dropdowns were selected manually—an easy step to miss, which led to export issues.
- Auto-populating these fields after a successful credit pull reduces errors and manual work.

How It Works

- Trigger: On a successful credit report pull.
- Auto-population: Path completes the *Borrower* and *Joint With* dropdowns with the names of borrower one and borrower two (when a second borrower exists).

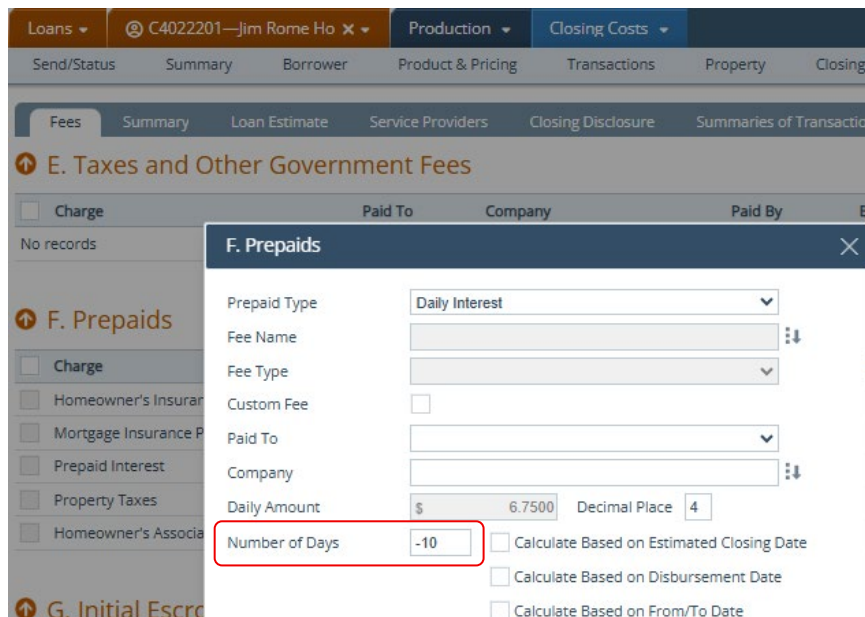
Production and Compliance

Closing Costs > Fees Tab

Number of Days Update (51671)

What's Updated

- ✓ Updated the *Number of Days* field to accept negative values, for scenarios where the prepaid interest indicates a prepaid interest credit.



Note

This field is enabled only when *Prepaid Type = Daily Interest*.

Documents and Interfaces

Document Date Import (49093)

What's Updated

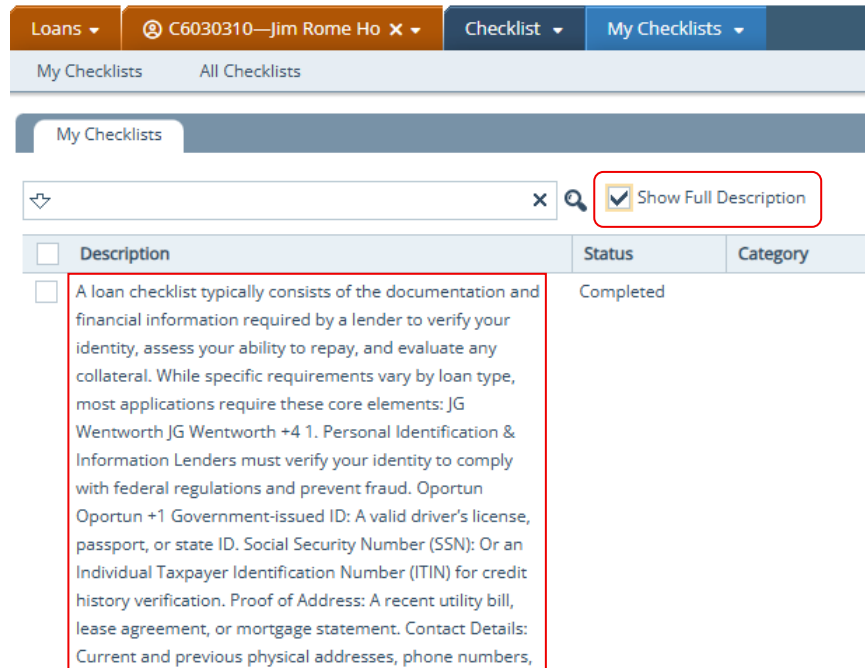
- ✓ The *Document Date* column now displays the date when a document is imported from *Interfaces*. Note that the date is when the document is imported, not when the report was ordered.
 - This update applies to the following *Interfaces* screens:
 - *Credit*
 - *AUS*
 - *Initial/Closing Docs*
 - *Flood*
 - *Mortgage Insurance*
 - *Fraud*
 - *Audit*
 - *Verifications*
 - *UCD*

Checklist

Show Full Description Checkbox (51666)

What's New

- ✓ Added the **Show Full Description** checkbox.



The screenshot shows the Path Calyx interface. At the top, there are navigation tabs: 'Loans', 'C6030310—Jim Rome Ho', 'Checklist', and 'My Checklists'. Below these are sub-tabs for 'My Checklists' and 'All Checklists'. A search bar is present with a 'Show Full Description' checkbox checked. Below the search bar is a table with columns for 'Description', 'Status', and 'Category'. A single row is visible with a checkbox in the 'Description' column, a detailed text description, 'Completed' in the 'Status' column, and an empty 'Category' column.

Description	Status	Category
<input type="checkbox"/> A loan checklist typically consists of the documentation and financial information required by a lender to verify your identity, assess your ability to repay, and evaluate any collateral. While specific requirements vary by loan type, most applications require these core elements: JG Wentworth JG Wentworth +4 1. Personal Identification & Information Lenders must verify your identity to comply with federal regulations and prevent fraud. Oportun Oportun +1 Government-issued ID: A valid driver's license, passport, or state ID. Social Security Number (SSN): Or an Individual Taxpayer Identification Number (ITIN) for credit history verification. Proof of Address: A recent utility bill, lease agreement, or mortgage statement. Contact Details: Current and previous physical addresses, phone numbers,	Completed	

Purpose

- To allow you to see the full text of the checklist's description without having to open the checklist's lightbox.
- This feature is available on both the *My Checklists* and *All Checklists* screens.

Bugfixes

Configuration and Loans

Small Creditor Default Fix (51129)

Issue

- 🔧 Previously, when the *Small Creditor* checkbox was selected in *Configuration > Business Units*, it did not default to selected in *Loans > Compliance > QM* screen as intended.

Fix

- ✓ Now, it works as intended: when *Small Creditor* is selected in the business unit, it *defaults to selected* in *Loans > Compliance > QM*.

Settings and Loans

Default Conditions Fix (51811)

Issue

- 🔧 Previously, when a business rule was attached to a default condition (*Default* checkbox selected in *Settings > Conditions*), the condition did not import to *Loans > Conditions* when the *Set Defaults* button was clicked, as was expected.

Fix

- ✓ Now, the *Set Defaults* button is working as expected, importing all the conditions that have the *Default* box checked, with or without business rules attached.

Loan Programs: Correct Rates Defaults on Selection (51464)

Issue

- 🔧 Previously, when a loan program was selected on the *Loans > Production > Product & Pricing* screen, the interest rates did not populate or default to the values configured in *Settings > Programs*.

Fix

- ✓ Interest rates now populate and default correctly based on the configurations in *Settings > Programs* when a loan program is selected on *Loans > Production > Product & Pricing* screen.

Configuration

Roles

Workflows > Production > Receive Loan > Loan Assignment Rules Table

Multi-Rule Auto-Assignment Fix (51711)

Issue

- ⚠ Previously, when a role had multiple *Loan Assignment Rules*, auto assignment did not trigger for certain rules.

Fix

- ✓ Auto assignment now evaluates all configured *Loan Assignment Rules* correctly. When a loan meets a rule, it is sent and auto-assigned to the target role as expected.

Settings

Templates

Add Field Value Lightbox > Value Dropdown

Value Dropdown Fix (51735)

Issue

- ⚠ Previously, certain values were missing from the *Value* dropdown list when *Label = Technical Affiliate* (field ID: *AUS.LPCreditAffiliate*).

Fix

- ✓ Now, all values are listed in the *Value* dropdown when *Label = Technical Affiliate*.

Programs

Program List Screen > ARM Plan Tab

Name Dropdown Fix (51518)

Issue

- Previously, in some cases, the *Name* dropdown on the *ARM Plan* tab displayed multiple blank options in addition to valid, active ARM plans.

Fix

- Now, the *Name* dropdown on shows only active ARM plans and no blank items.

Loans

Forms

Month Order Fix (51619)

Issue

- Previously, months were listed out of order on the Initial Escrow Account Disclosure Statement form.

Fix

- Now, months are printing on the form in the correct order.

Documents

eSign Placement: Legal-Size Page Boundary Fix (51498)

Issue

- When preparing legal-size forms (8.5" × 14"), placing an eSign block below the letter-size boundary (i.e., below the 11" mark) triggered an error and blocked submission to eSign.

Fix

- Now, the placement validator uses the document's actual page size. eSign blocks can be positioned anywhere within the page's true boundaries on legal-size forms.

PDF E-Signature Retention Fix (51734)

Issue

- 🔧 Previously, certain PDF files lost their e-signature when passed through API.

Fix

- ✓ Now, PDFs retain their e-signatures when passed through API.

Interfaces

Mortgage Insurance Screen

Quick View Lightbox Corrected (49756)

Issue

- 🔧 Previously, the *Quick View* lightbox only did not display the entire document. Clicking the *Next* button did not display later pages. This was purely an UI/UX issue. The entire document was imported and exported.

Fix

- ✓ Now, the entire document is displayed in the *Quick View* lightbox.

Credit Screen > Order Tab

Date Column Time-Zone Fix (48137)

Issue

- 🔧 Previously, the *Date* column incorrectly displayed the date of the ordered report corresponding to UTC time.
 - For example, a credit report ordered on 05/30 at 4:21 PM HST previously displayed as 05/31 in the *Date* column.

Fix

- ✓ Now, the *Date* column correctly displays the date.

Lock

Summary Screen

Lock Management: Correct Cancellation Dates (51355)

Issue

- Previously, the *Lock Cancel Date* was being populated with the last lock request date/approval date instead of the date the lock cancellation was requested. Also, the *Lock Request Date* did not update when a lock cancellation was requested.

Fix

- Now, the *Lock Cancel Date* records the date when the cancellation is approved. And the *Lock Request Date* updates when lock cancellation is requested.

Example

- Cancel requested: 10/10/2025
- Cancel approved: 10/14/2025
- *Lock Cancel Date* = 10/14/2025

Request Screen

Lock Request Error Message Fix (51606)

Issue

- Previously, *OB Lock Request* could cause an error message due to the 2-4 Family option missing in the *Property Type* in the outbound request.

Fix

- Updated the logic for *OB Lock Request* to ensure all selected *Property Type* options are present and correctly mapped.

Request Screen > Eligible Pricing Search Result and Rate Sheet Detail Lightboxes

Price/Points Display Consistency (51767)

Issue

- When *Pricing Parameters > Price Result Format* was set to *Price* (in the *Eligible Pricing Search Result* lightbox), the *Eligible Products* list correctly displayed *Adjusted Price* values (e.g., 99.08900, 99.91200).

However, opening a product (in the *Rate Sheet Detail* lightbox) sometimes switched to *Points* (e.g., -0.125, 0.500), creating a mismatch between the two lightboxes.

Fix

- ✓ Now, the selected *Price Result Format* (*Price* or *Points*) is honored consistently across the two lightboxes.

Production

Product & Pricing Screen

Loan Type Change Fix (51368)

Issue

- ✘ Previously, when the *Loan Type* was changed from *Conventional* to *FHA/VA/USDA*, the mortgage insurance information occasionally would not update when the *Premium %* field was unlocked and editable (Mortgage Insurance section).

Fix

- ✓ Now, changing *Loan Type* locks the *Premium %* field, which updates the mortgage insurance information.

Product & Pricing and Loan Transmittal Screens

AUS Recommendation Casing (51668)

Issue

- ✘ Previously, the *Approved/Eligible* option (selected from the *AUS Recommendation* dropdown, in *Product & Pricing > Pricing Search Parameters* lightbox) did not retain its capitalization when it was copied to the *Loan Transmittal* screen.

Fix

- ✓ Now, the *Approved/Eligible* option retains its capitalization and casing when copied to the *Loan Transmittal* screen from the *Product & Pricing* screen.

Borrower Screen

Borrower Suffix Display Fix (51723)

Issue

- ✘ Previously, the *Shared With* dropdown did not display the suffix for borrowers with suffixes in their names.

Fix

- ✓ Now, the suffix is displayed for borrower names that have suffixes.

Property Screen

Subject Property: Licensed States Only (51540)

Issue

- ✘ Previously, a user who was not licensed (did not have access) in a state could still select that state in the *Subject Property Information* section.

Fix

- ✓ Now, users are prevented from selecting states they are not licensed in (do not have access to) from the *State* dropdown menu.

Note

A user's access rights are granted by the system admin in:

1. *Configuration > Users > user's Detail > State* section
2. *Configuration > Business Units > Loan Portfolios*

Originator Screen

Select Processor: Inactive Users Removed (40773)

Issue

- ✘ Previously, the *Select Processor* lightbox displayed users that were no longer active.

Fix

- ✓ Now, the *Select Processor* lightbox only displays active users.

Interfaces and Production

Census Tract Preserved After Flood Order (51587)

Issue

- ✘ Previously, on the *Production > Property* screen, *Census Tract* information was cleared after placing a flood order and receiving results in *Interfaces > Flood*.

Fix

- ✓ The *Census Tract* information is retained now after placing a flood order.

Additional Field Mapping & Import Corrections (41128)

Issue

- ✘ Previously, certain fields sent in the Mercury appraisal response XML were not importing into *Property screen > Project Information* or imported incorrectly.

Fix

- ✓ Path now imports the following fields from the embedded XML in the appraisal response and maps them to *Project Information*:
 - *Project Classification*
 - *Project Name*
 - *Total Dwelling Units*
 - *Total Dwelling Units Sold*

Reports and Production

Pricing V3 Note Rate: Audit Trail Logging Fix (51674)

Issue

- ✘ Previously, after selecting a product via *Production > Product & Pricing > Pricing V.3* and then updating the note rate, the rate on *Product & Pricing* screen updated correctly, but the change was not recorded in *Reports > Audit Trail Reports*.

Fix

- ✓ Now, any changes in the note rate through *Pricing V.3* is correctly accounted for in *Audit Trail Reports*.

Compliance and Production

Negative Prepaid Interest Calculation Fix (51644, 51562)

Issue

- ✘ Previously, when *Prepaid Interest* was negative (interest credit), the negative amount was not included in *Total of Payments*.

Fix

- ✓ Now, the calculations for *Total of Payments* have been updated to deduct negative *Prepaid Interest*. This update also applies to the calculations in *Amount Financed*, *APR*, and *Finance Charge*.

MME

Submitted Documents Import Fix (51102)

Issue

- ⚠ Previously, submitted documents were not being imported in loans which were submitted to wholesale lenders through the MME.

Fix

- ✓ Now, submitted documents are being correctly imported to wholesale lenders.

Note

The MME is accessed through *Loans > Production > Summary* screen > *MME* button. Ensure that this feature is already configured for your organization before using.