# 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 |

# Contents

# Enhancements

## Configurations

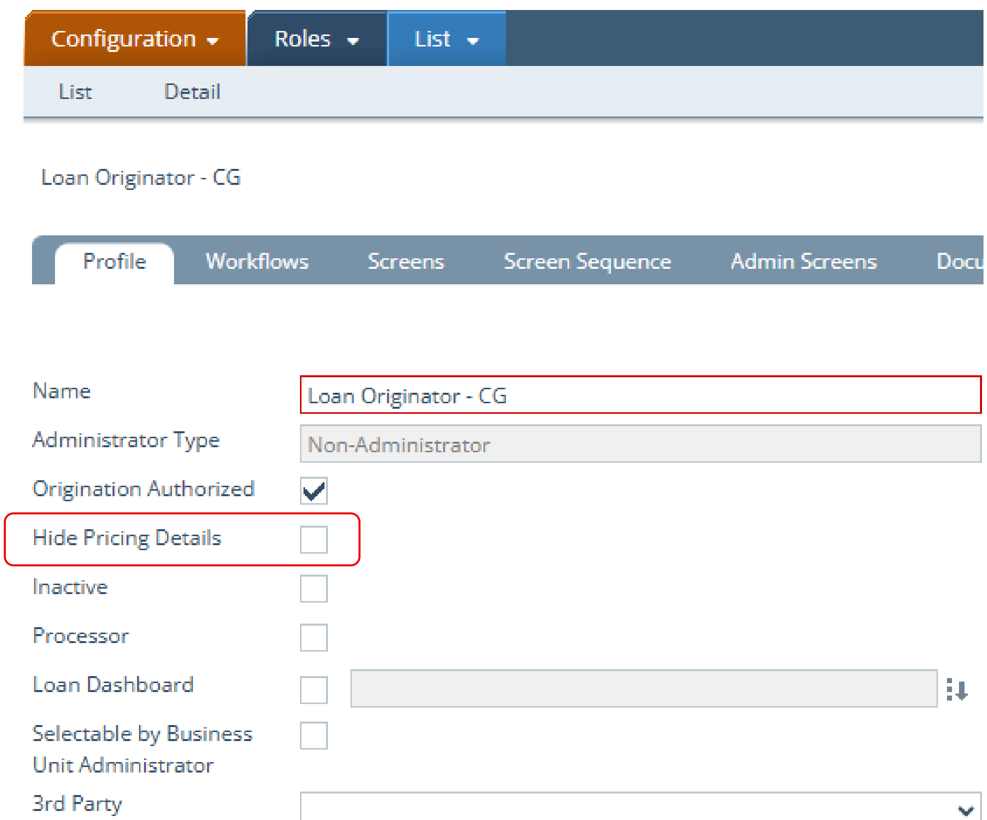
### Roles

#### 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.




**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.

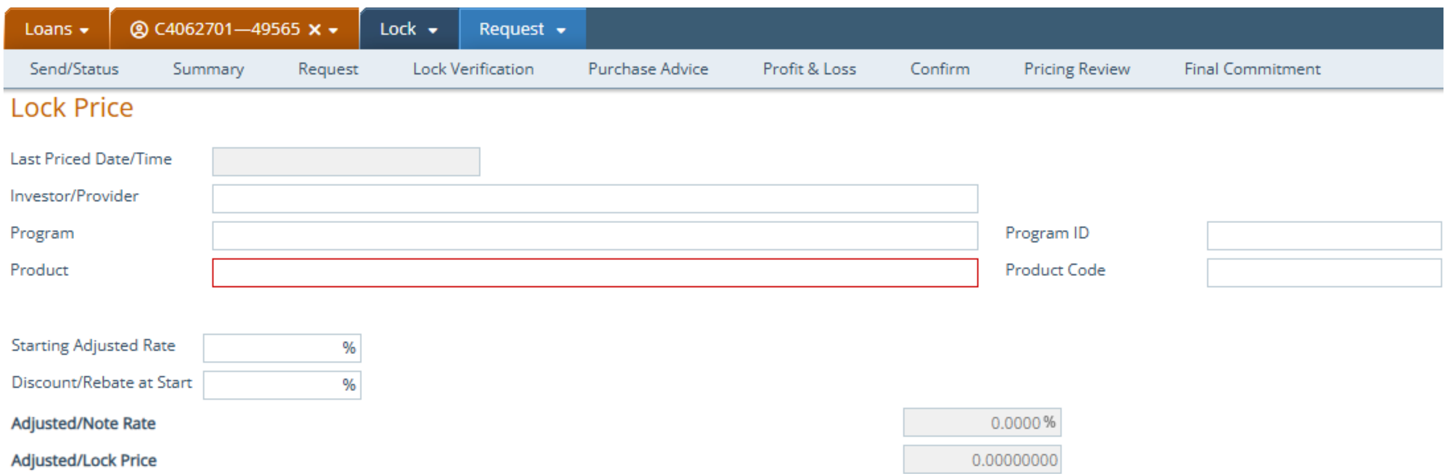
### Why This Helps

– 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

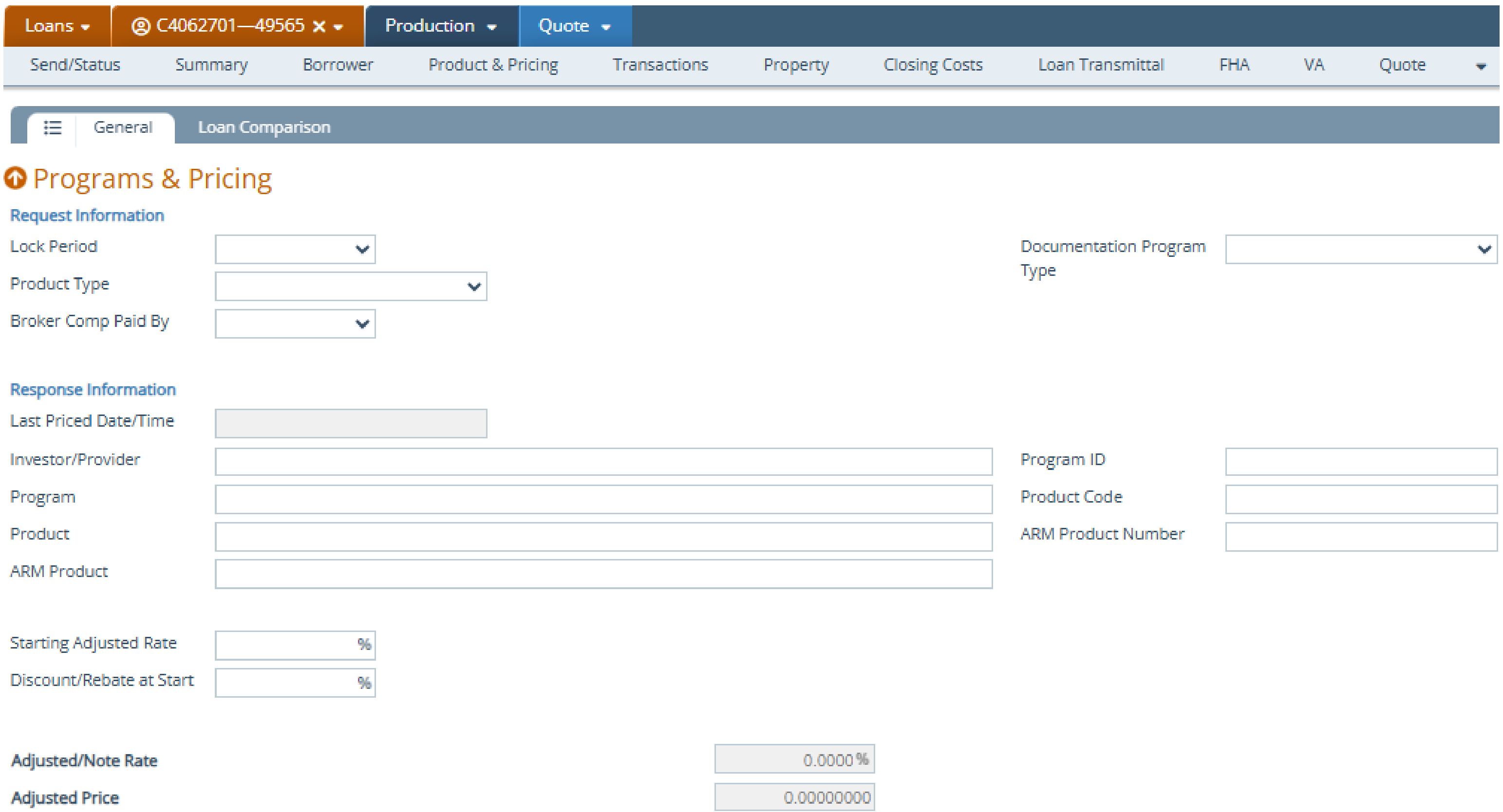
- Most of the sections and fields are unimpacted. The impacted section is *Lock Price*, which looks like the below image when the **Hide Pricing Details** box is checked for this role.




- 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

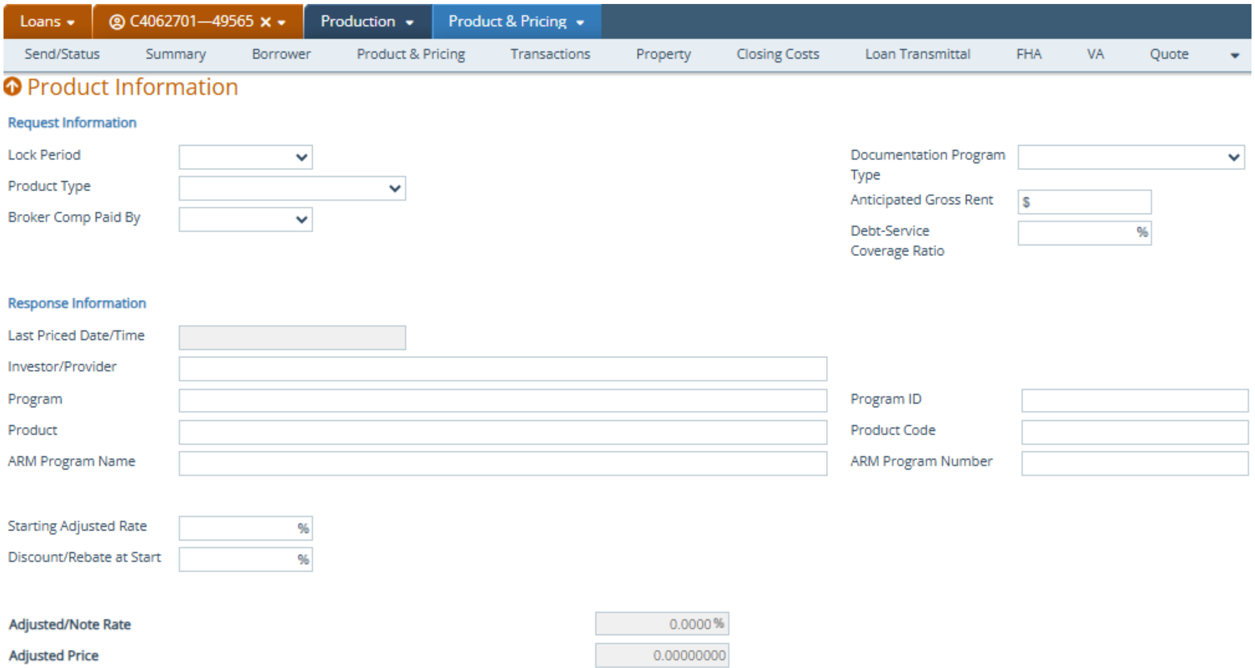
- Most of the sections and fields are unimpacted. The impacted section is *Programs & Pricing*, which looks like the image below when the **Hide Pricing Details** box is checked for this role.




- 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.




- 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

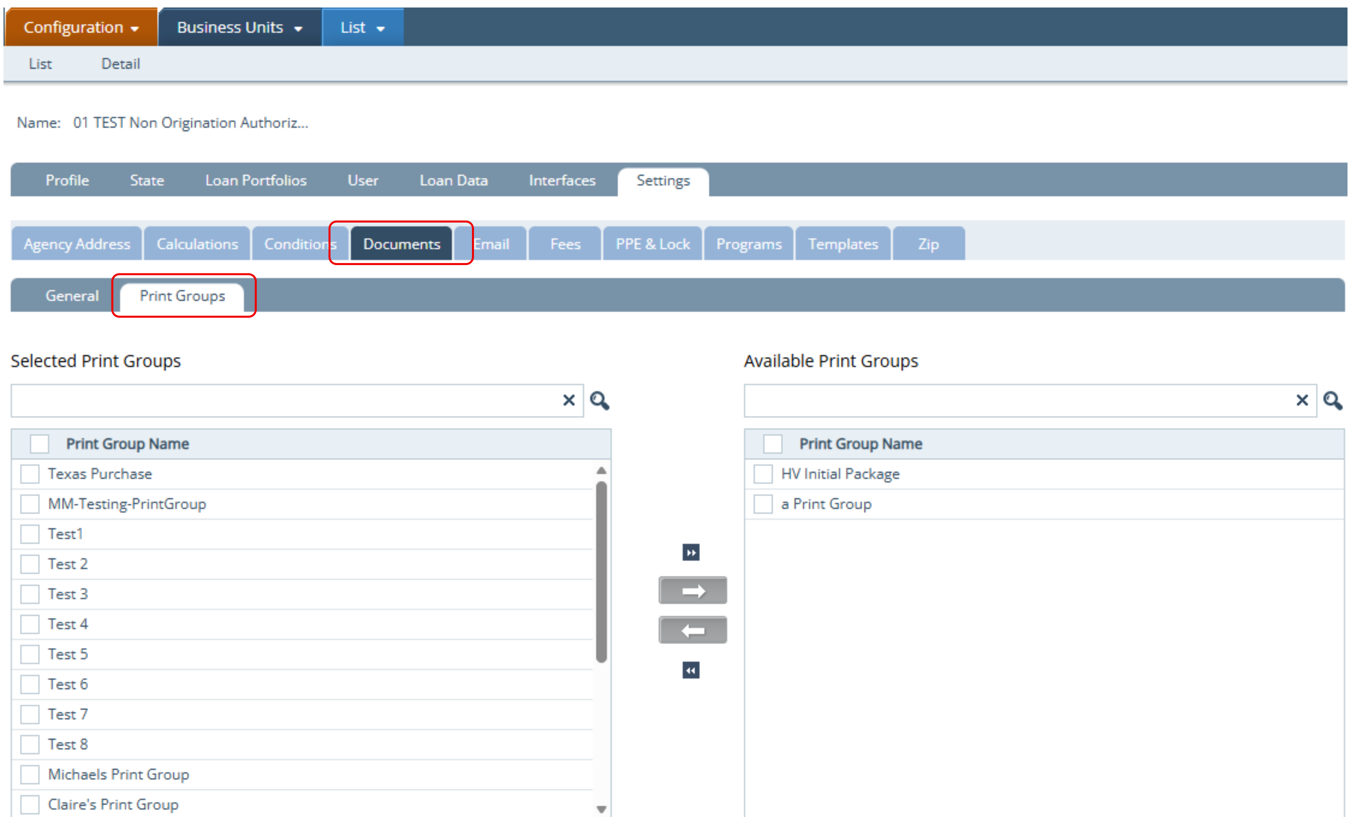
## Settings Tabs

### Multiple Enhancements (51677)

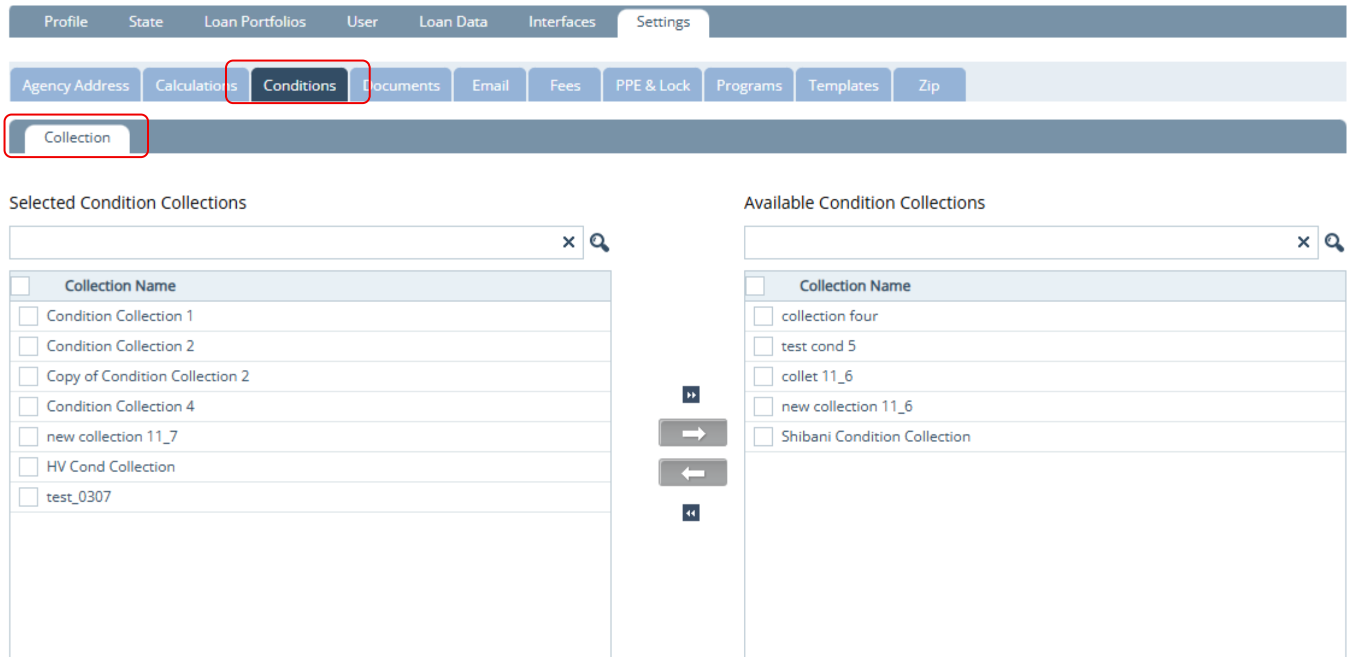
#### What's Enhanced

✓ 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:

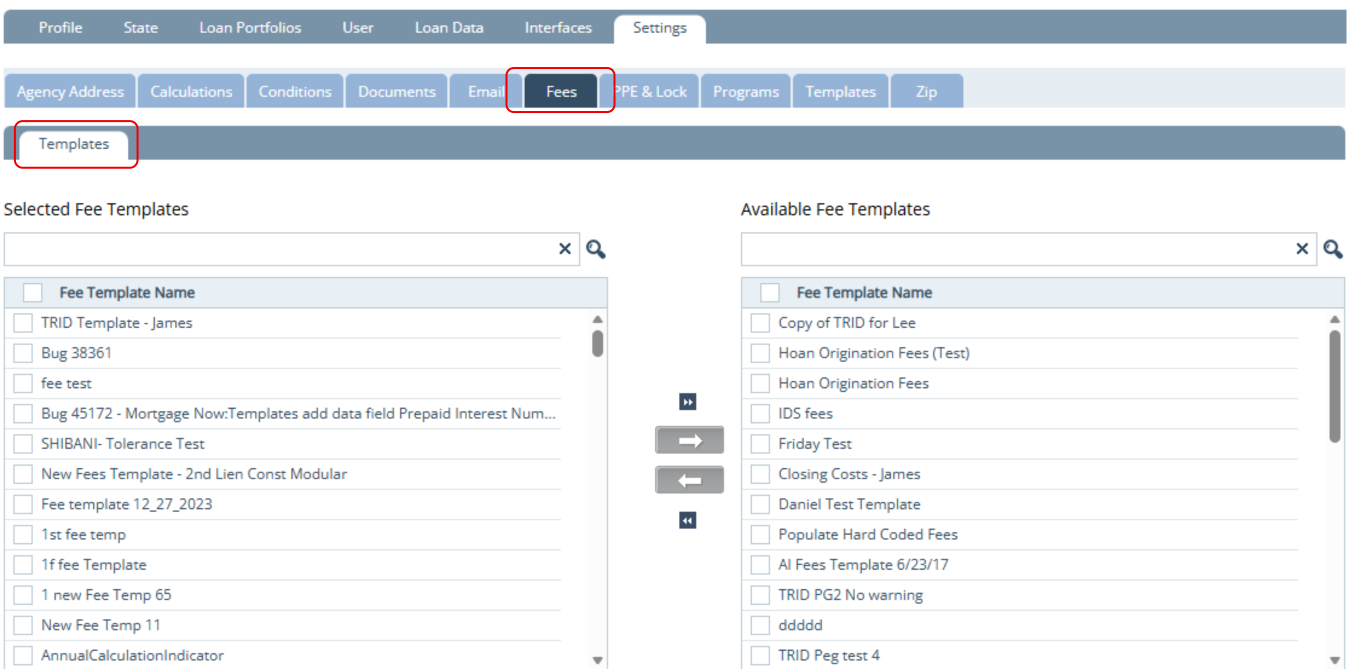
- Document **Print Groups** – corresponding to *Settings* > *Documents* > *Print Groups*



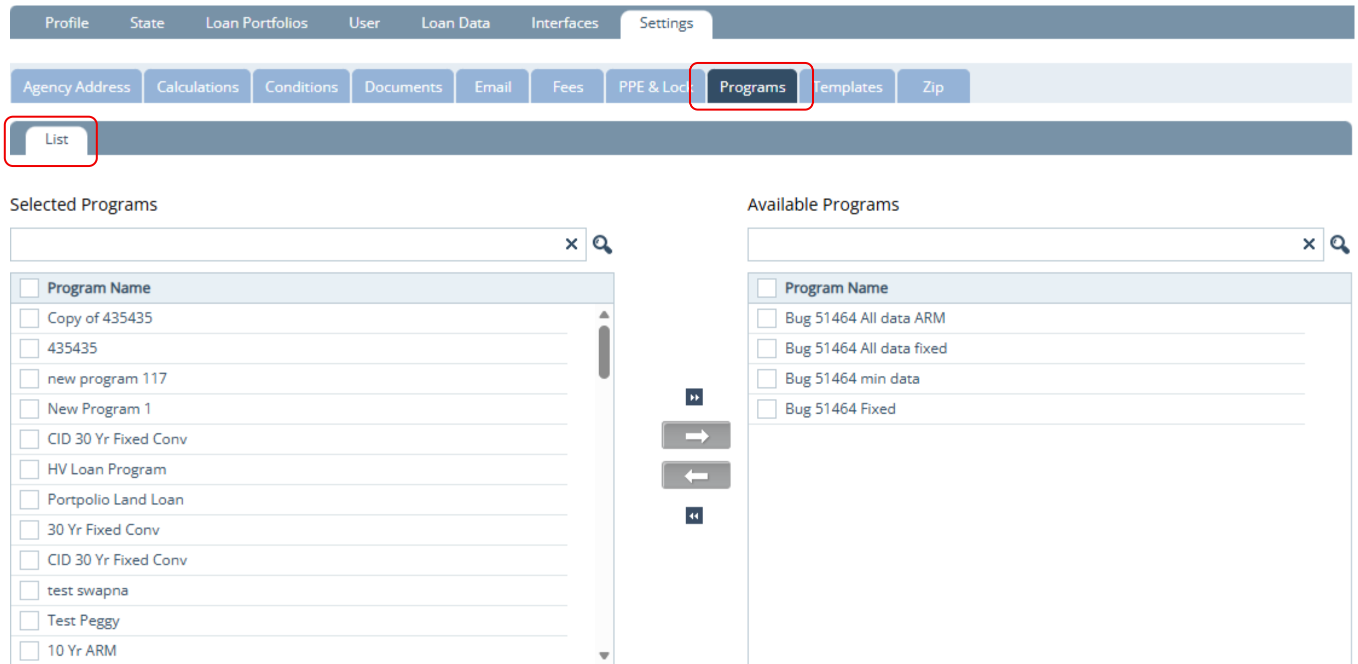

- Condition **Collections** – corresponding to *Settings* > *Conditions* > *Collections*



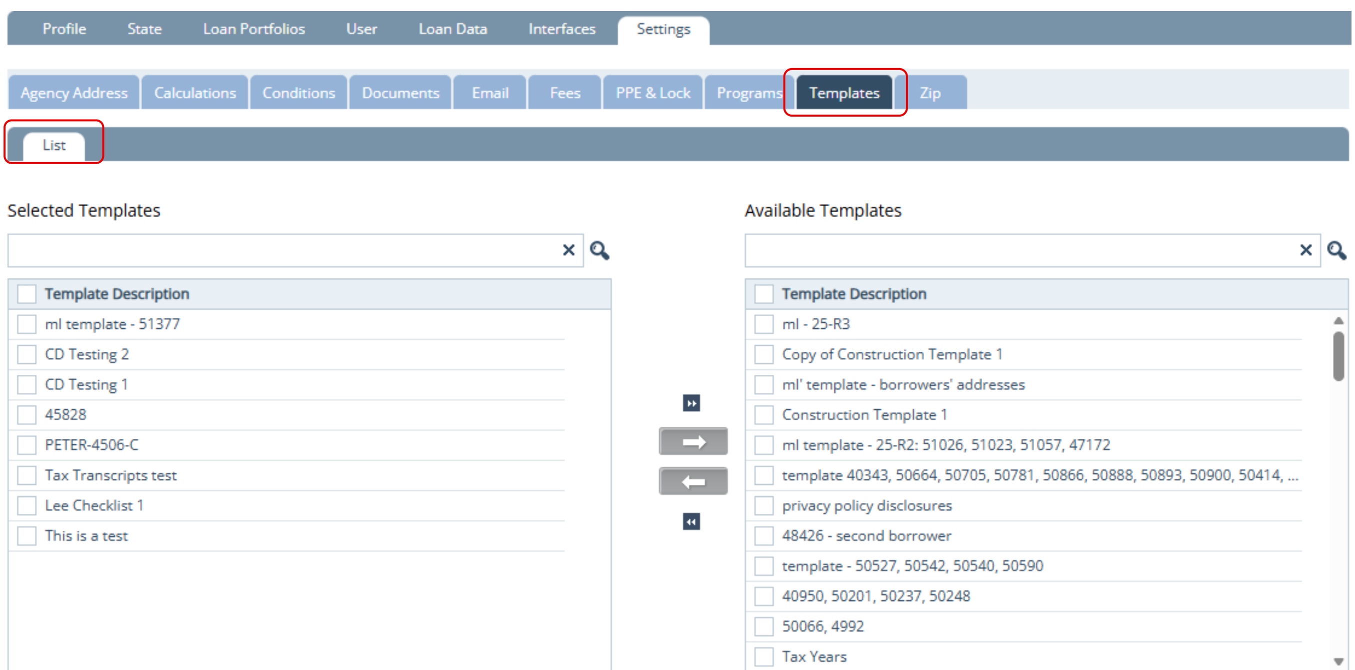

– Fee **Templates** – corresponding to *Settings* > *Fees* > *Templates*




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




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




### 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

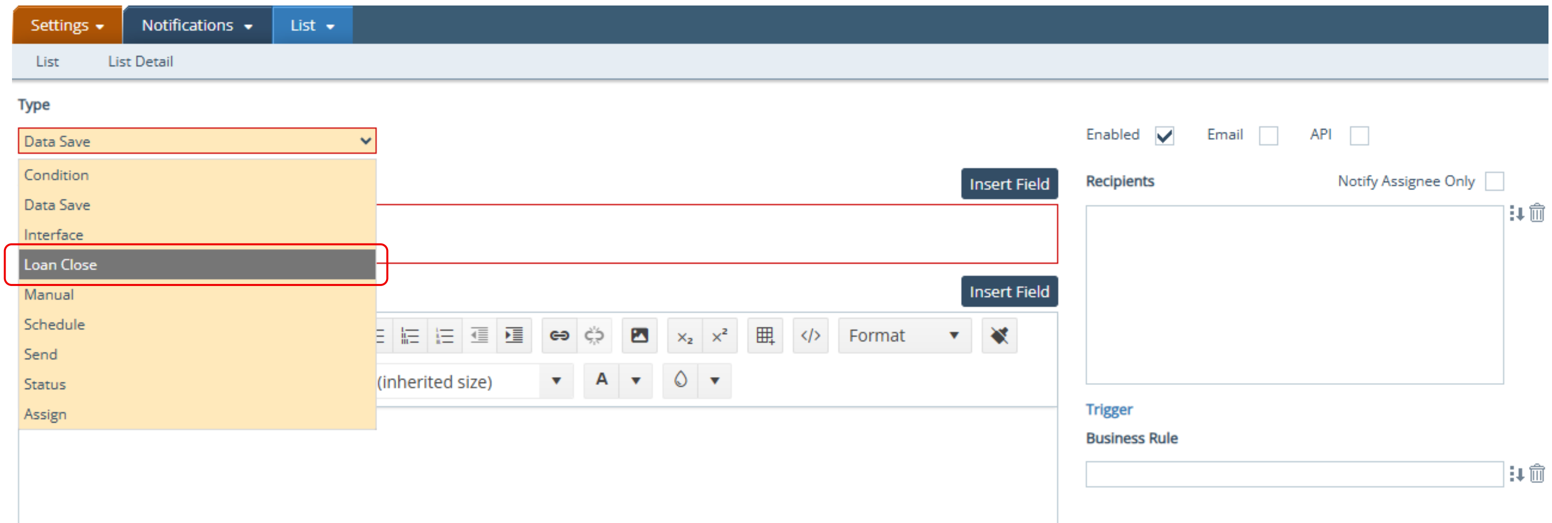
# Settings

## Notifications

### New Loan Close Notification (51311)

#### What's New

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

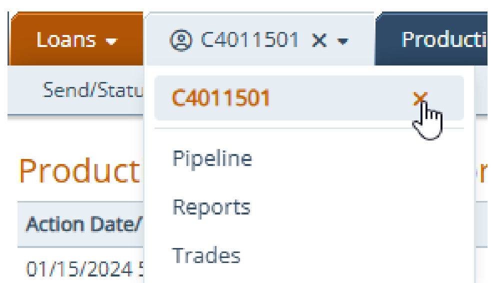



## Purpose and Usage

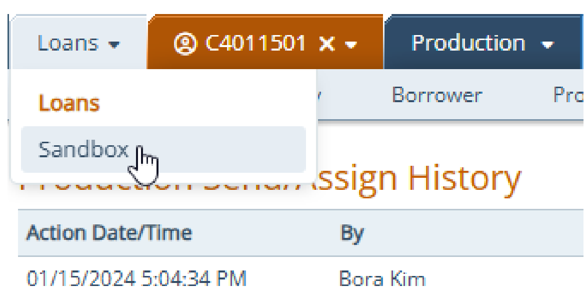
- Select **Loan Close** to notify recipients when the loan has been closed.

## 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

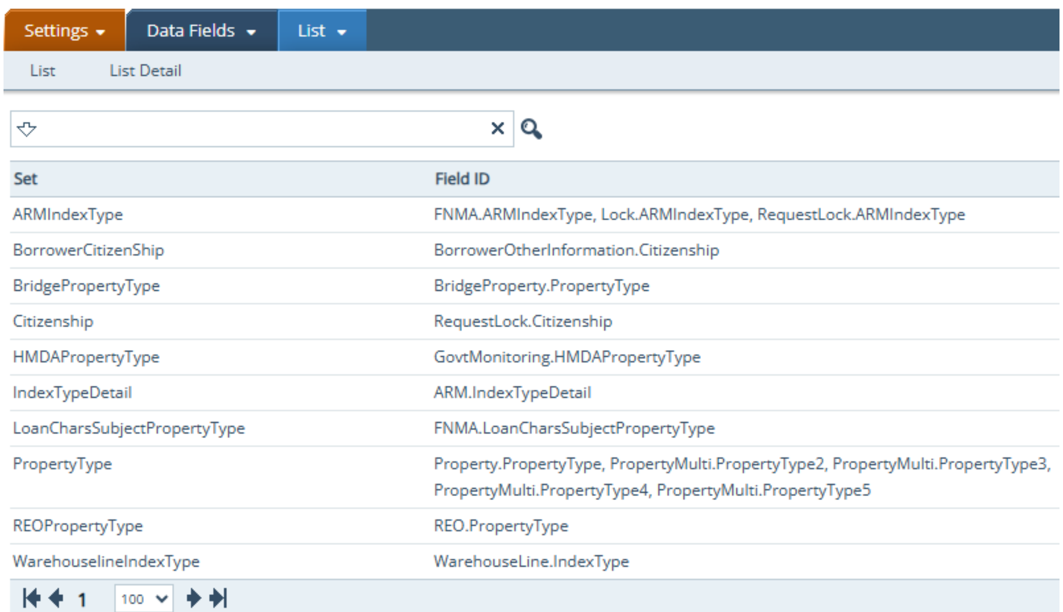
✓ Added the new **Settings** > **Data Fields** screen, which allows system administrators to show or hide specific dropdown values (enumerations) for selected fields, which are displayed in *Loans*. This capability supports use cases such as removing unsupported ARM index values from *ARM.IndexTypeDetail*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

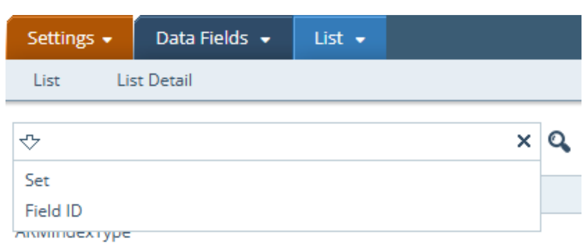
– Navigate to *Settings* > **Data Fields**.




| 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)

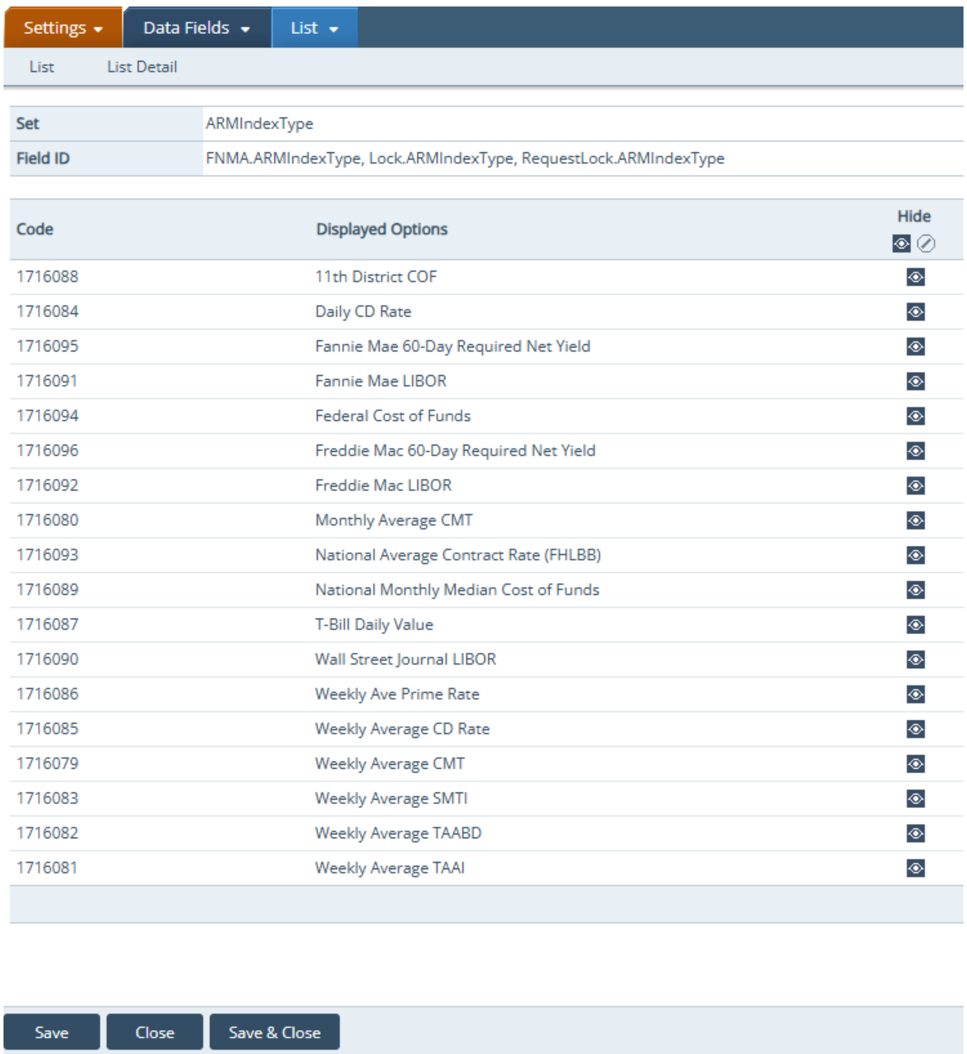



  - Blank searches across **Set** + **Field ID**

- **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.




- 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.

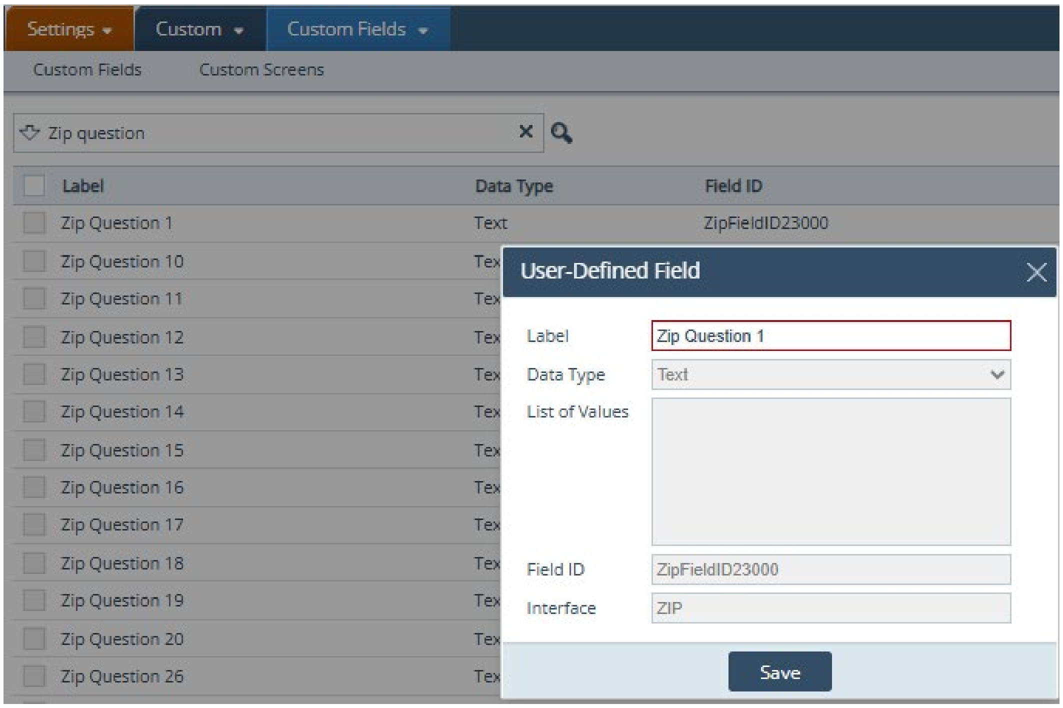
**What's included**

- 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.


| Label | Data Type | Field ID | Interface |
|---|---|---|---|
| Zip Question 1 | Text | ZipFieldID23000 | ZIP |
| Zip Question 10 | Text | ZipFieldID23018 | ZIP |
| Zip Question 11 | Text | ZipFieldID23020 | ZIP |
| Zip Question 12 | Text | ZipFieldID23022 | ZIP |
| Zip Question 13 | Text | ZipFieldID23024 | ZIP |
| Zip Question 14 | Text | ZipFieldID23026 | ZIP |
| Zip Question 15 | Text | ZipFieldID23028 | ZIP |

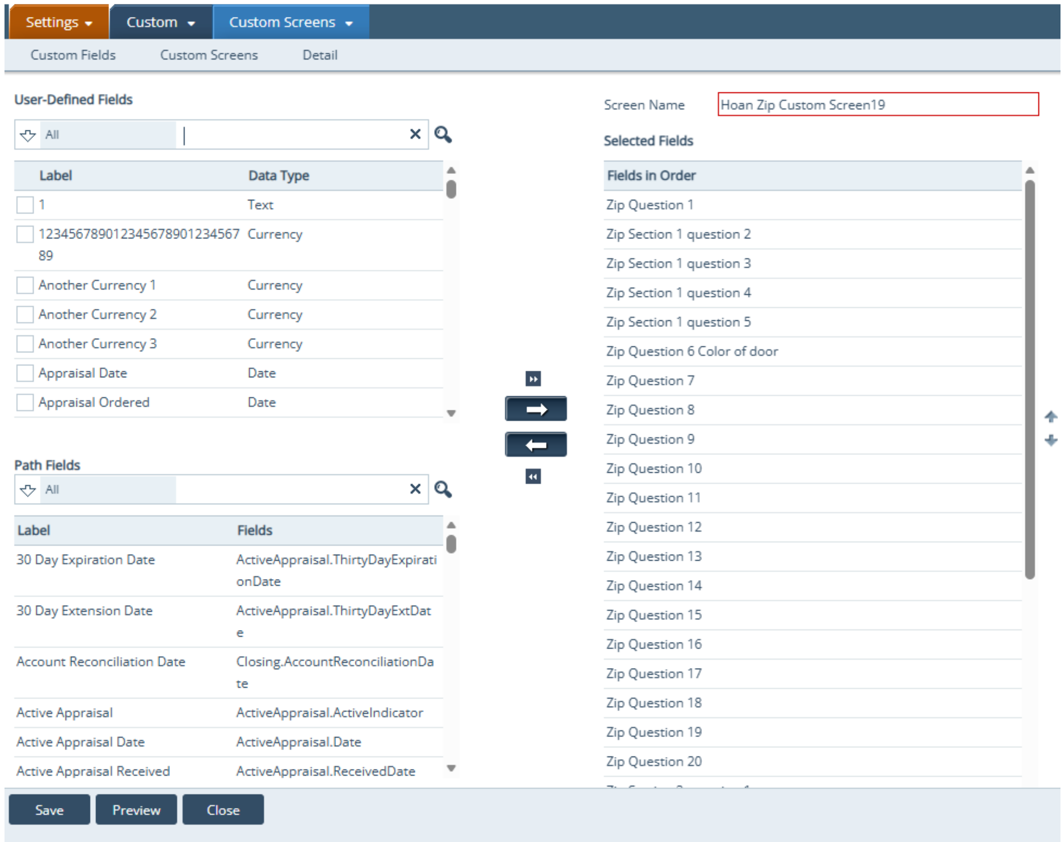
- Locked from deletion

    - 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.




### 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.

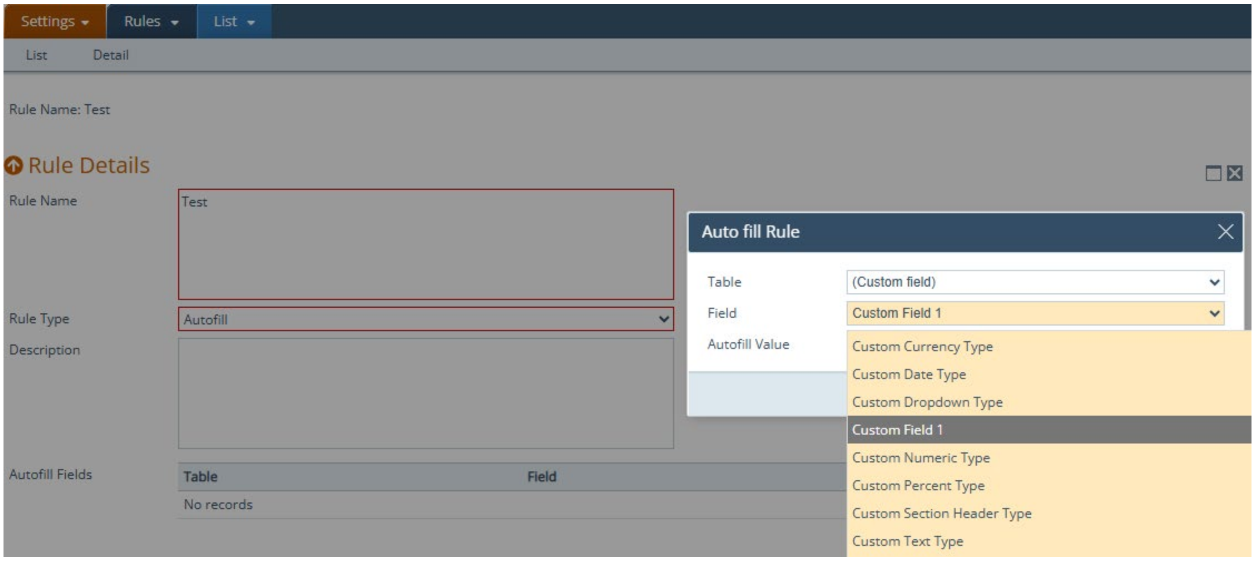



# Rules

## 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.

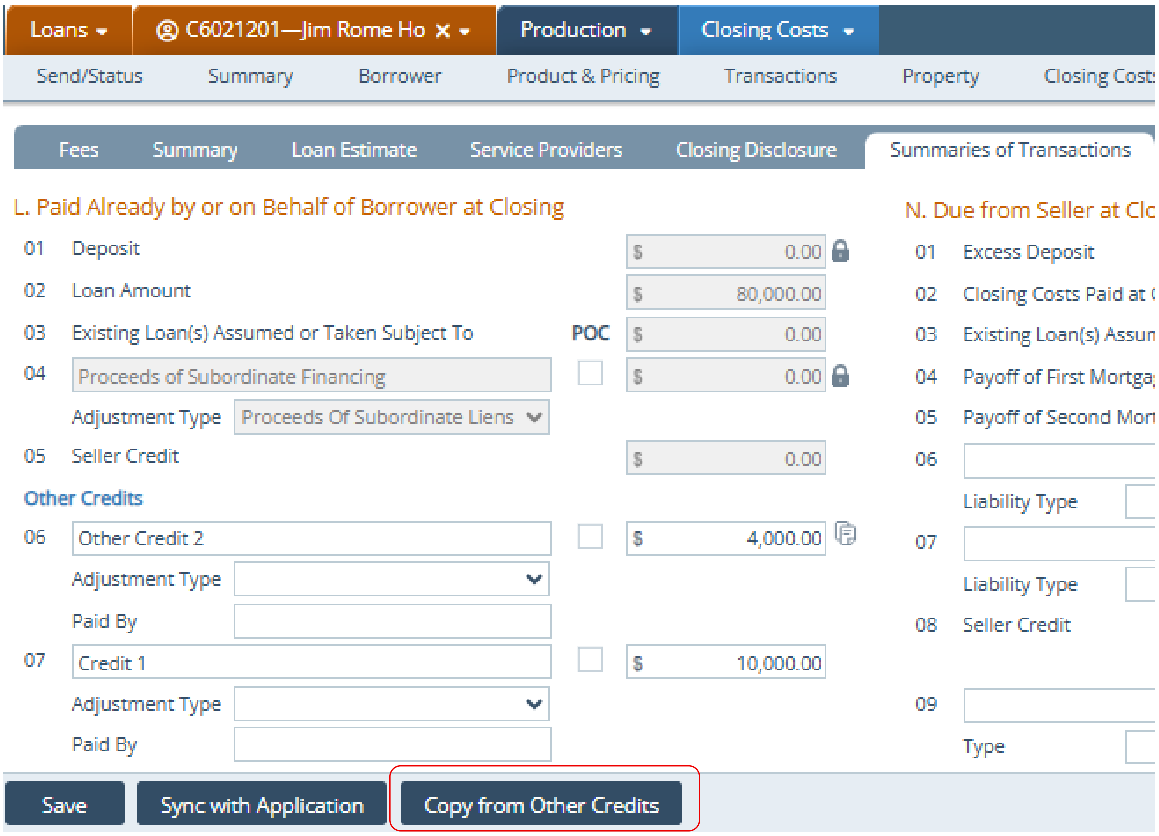
# Production and Compliance

## Closing Costs > Summaries of Transactions Tab

### Copy from Other Credits Button (51679)

**What's New**

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



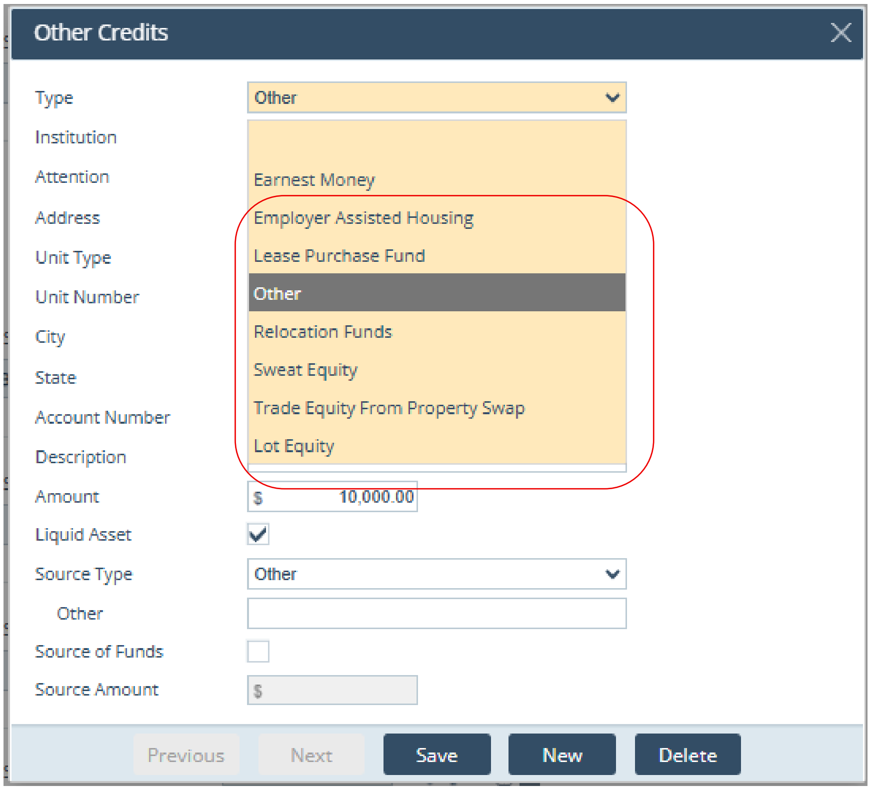

**Purpose and Usage**

- 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.

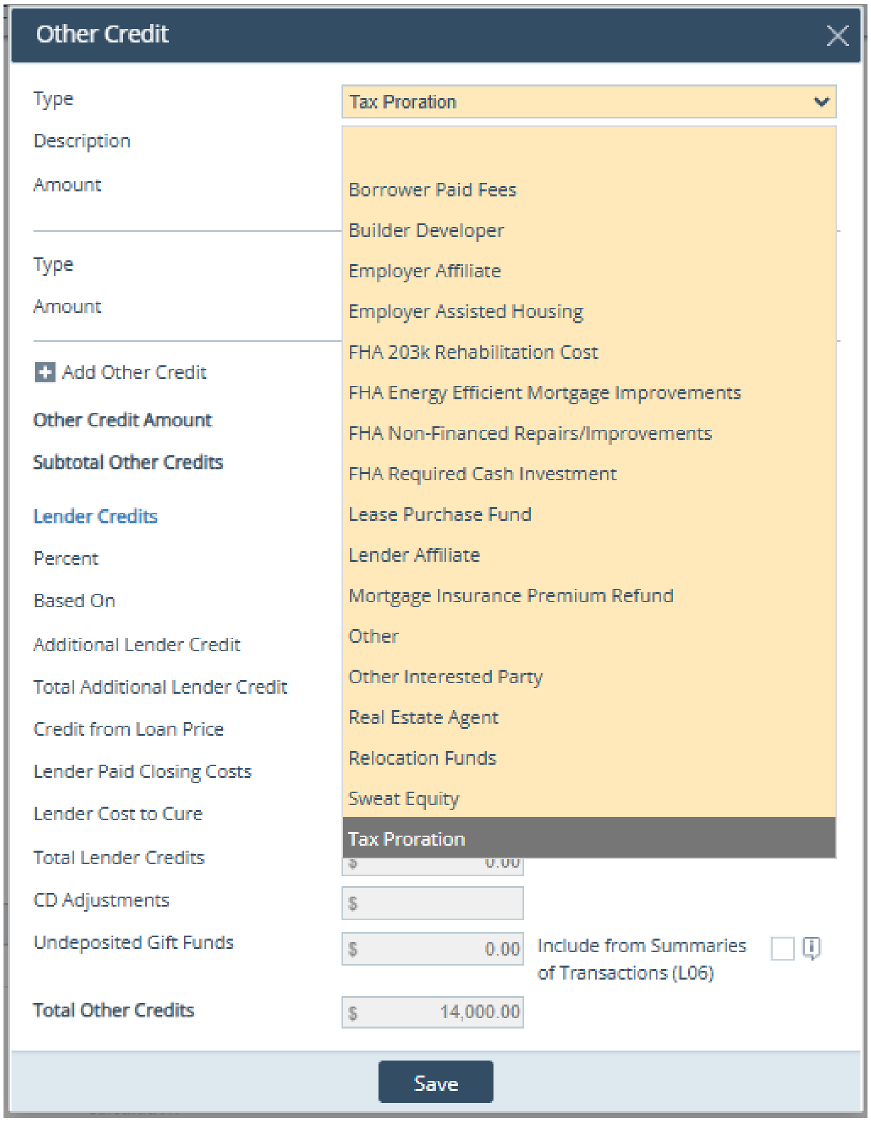
**Scope**

- 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*.




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

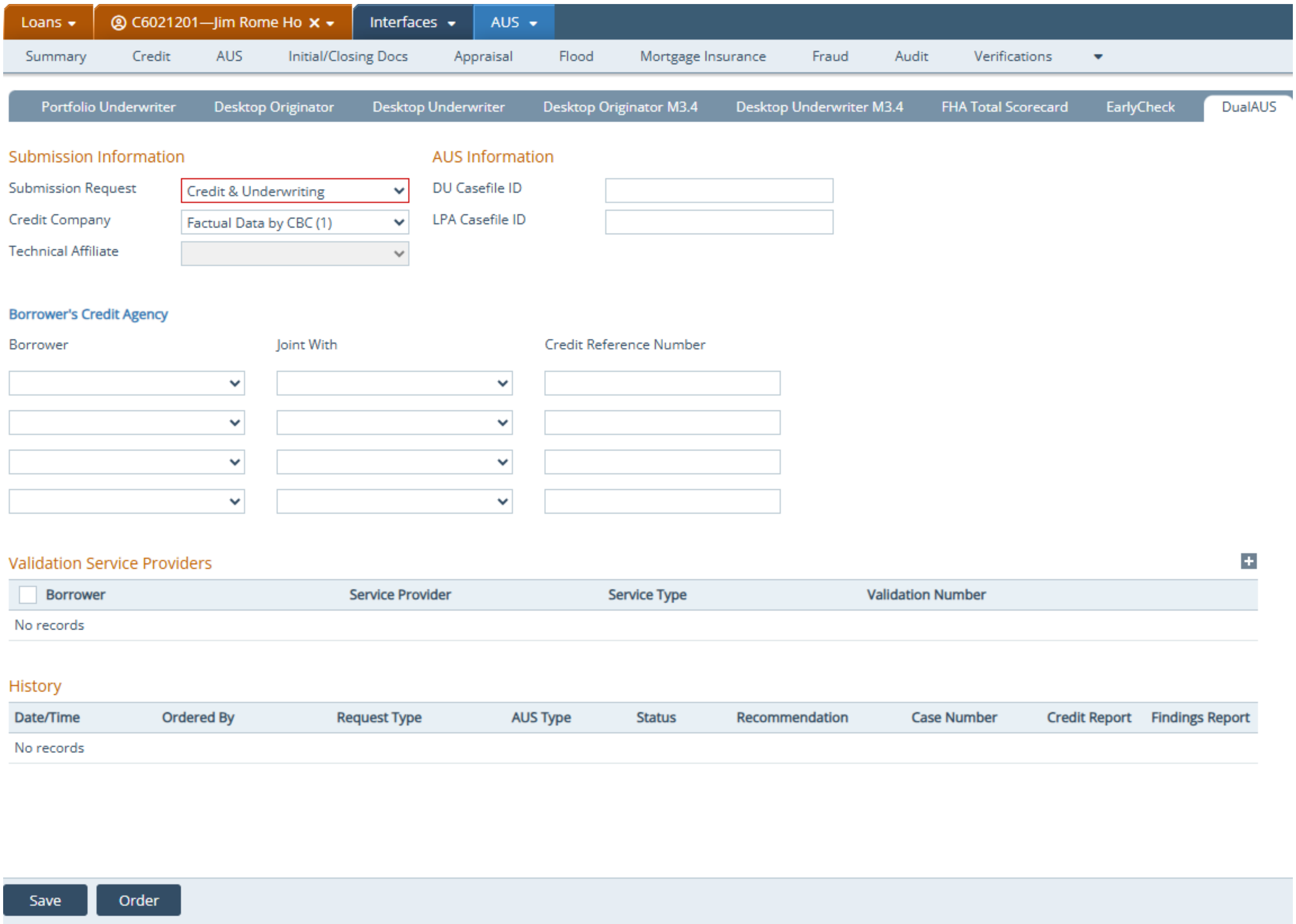
# Interfaces

## 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.



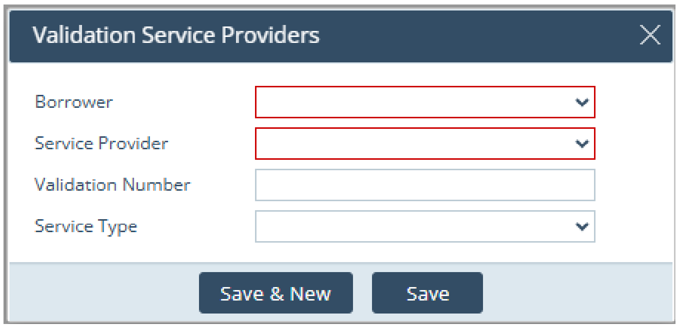

## Purpose

- 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.

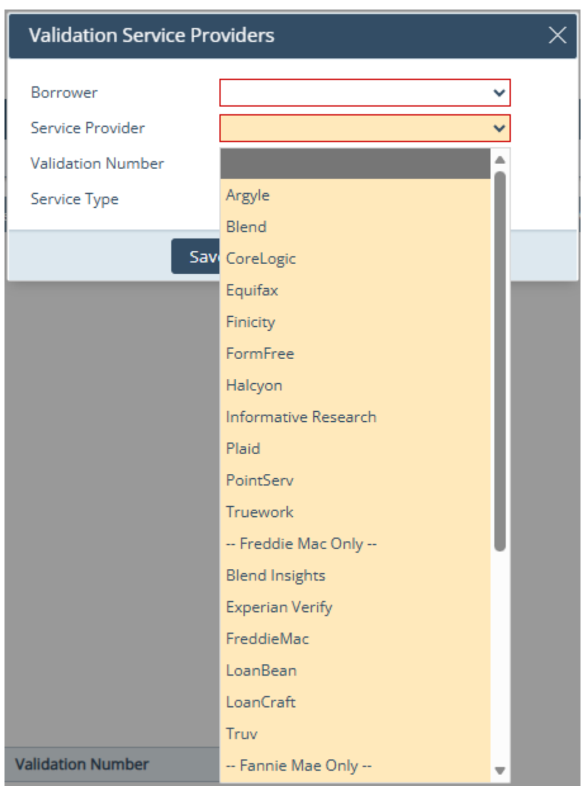
## Usage

- 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.

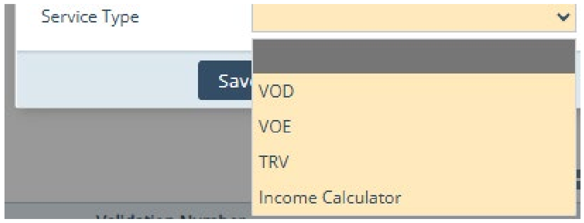



    - **Borrower**—selectable list of up to **5 borrowers**.
    - **Service Provider**—includes providers such as **Argyle, Blend, CoreLogic, Equifax, Finicity, FormFree, Plaid, Truework**, plus Freddie-only and Fannie-only options.

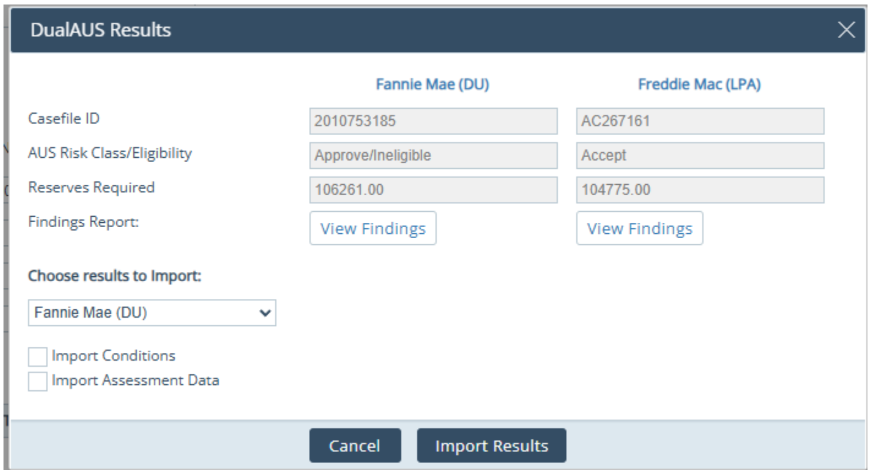



    - **Validation Number**—editable; supports auto-copy behavior for FormFree/VOA key scenarios as defined in the FRD.

- 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)

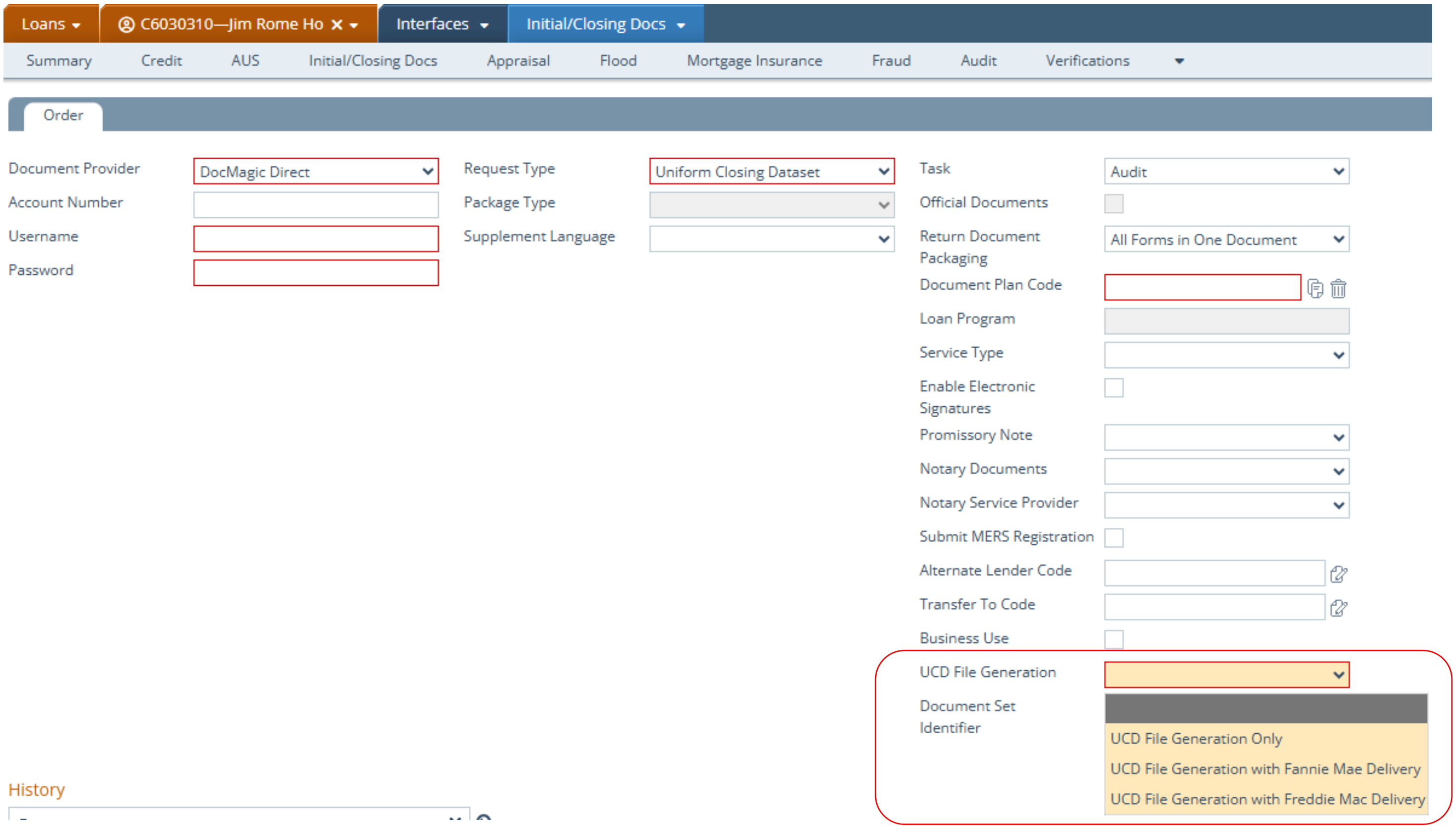
- **DualAUS** records the history using fields, including:
  - **Date/Time**—uses return timestamp when available, otherwise defaults to now.
  - **Ordered By**—Path user first/last name.
  - **Request Type**—based on the user's submission selection.
  - **AUS Type/Status/Recommendation/Case Number**—populated 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**.




## 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 is 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.

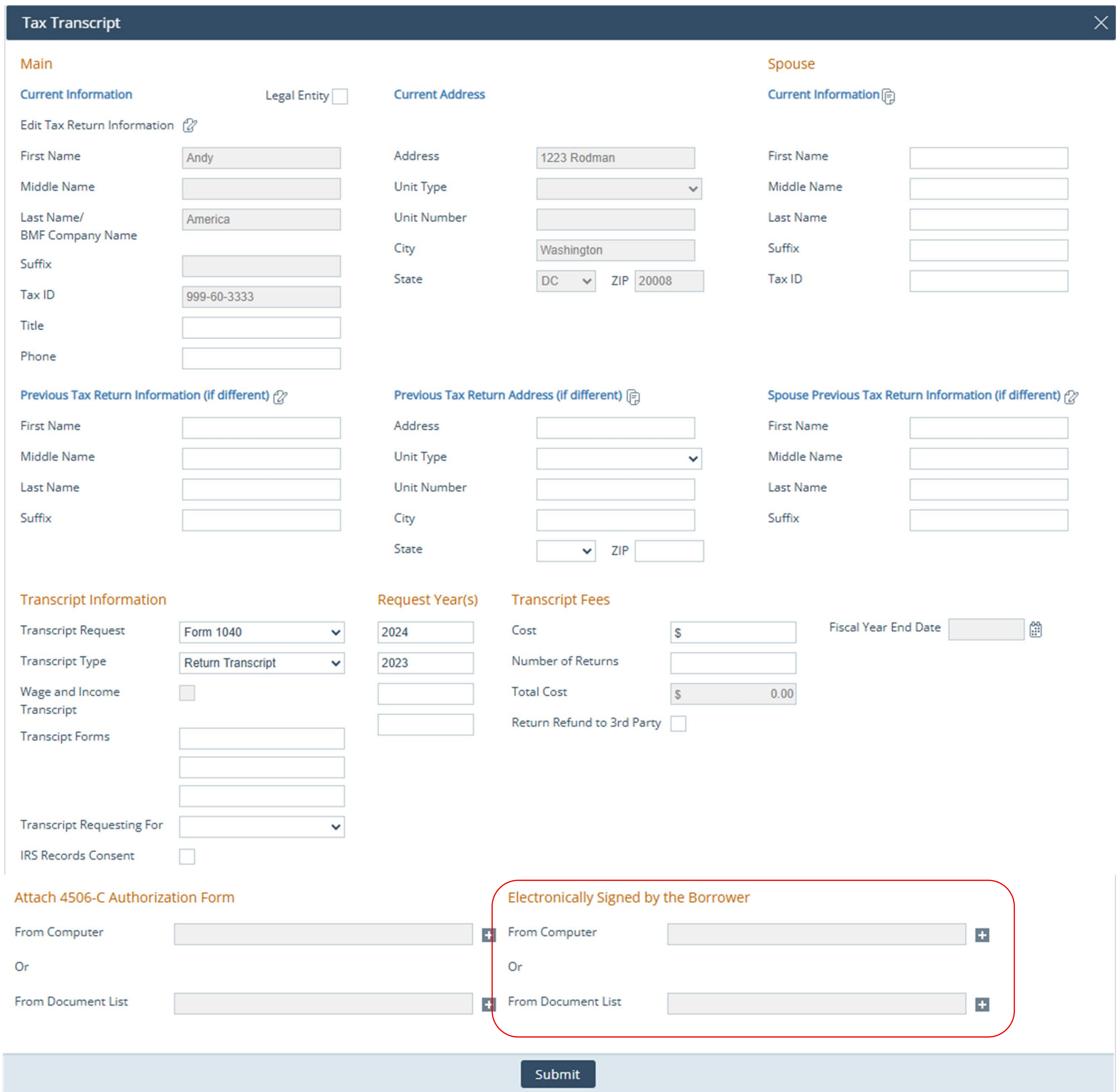
# Verifications Screen

## 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.



# Documents > List

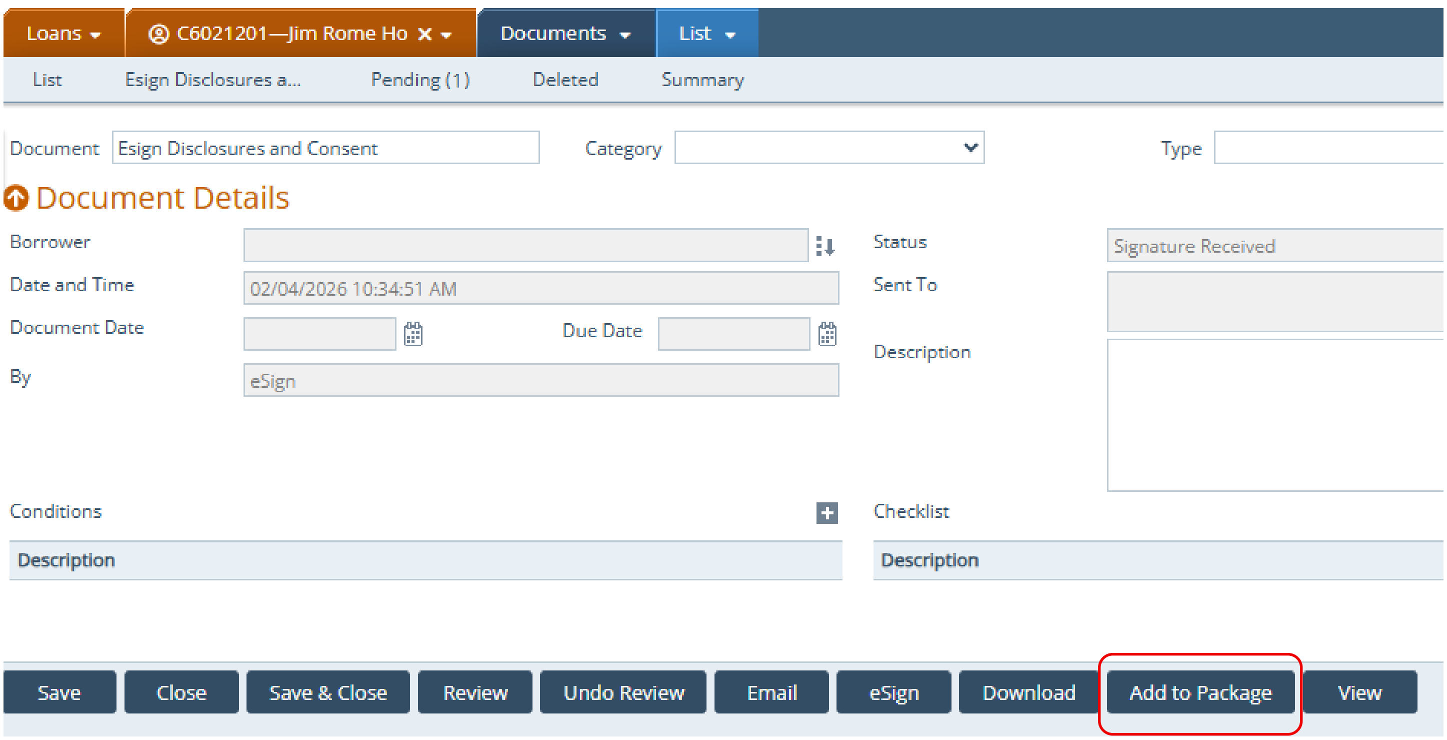
## Add to Package Button/Lightbox (48892)

### What's New

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

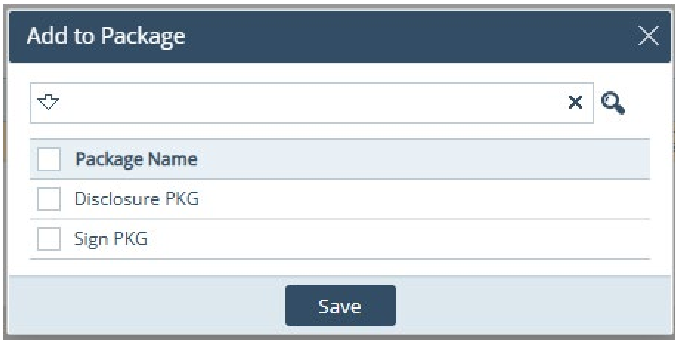
### Purpose

- 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.




### 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**.

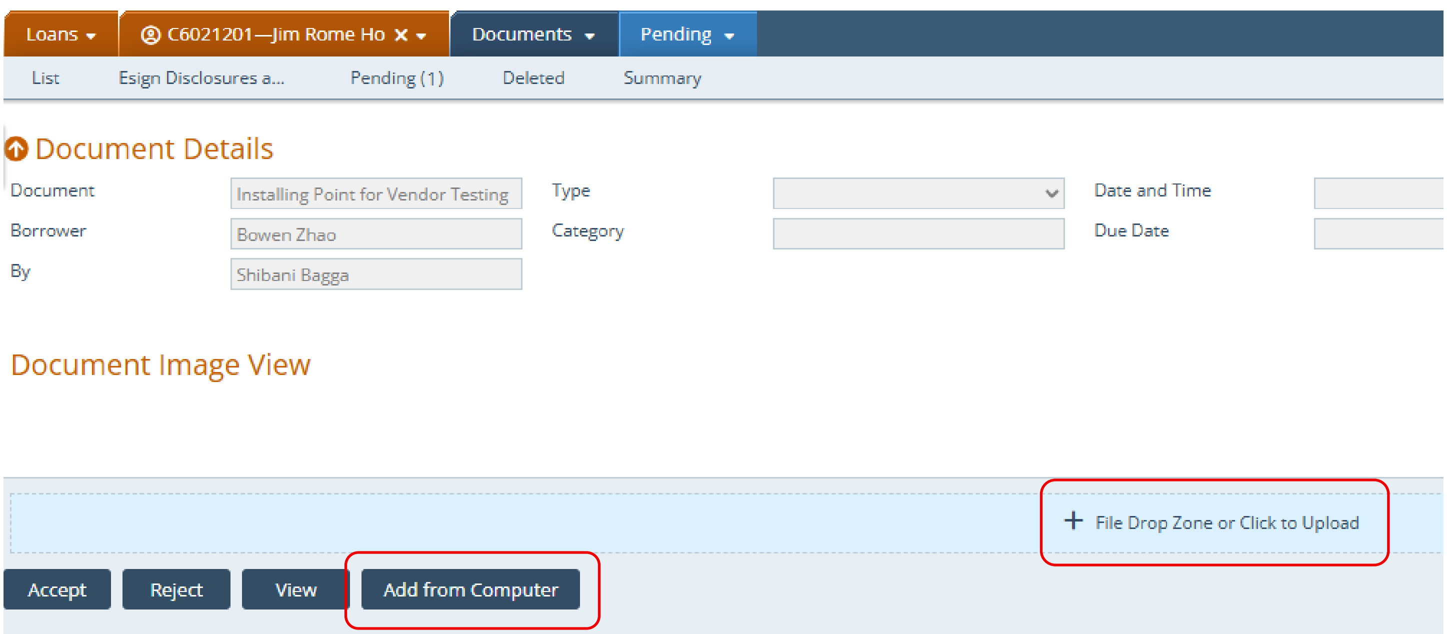
  - The same document can be added to multiple packages from this lightbox.

# 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.




### 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

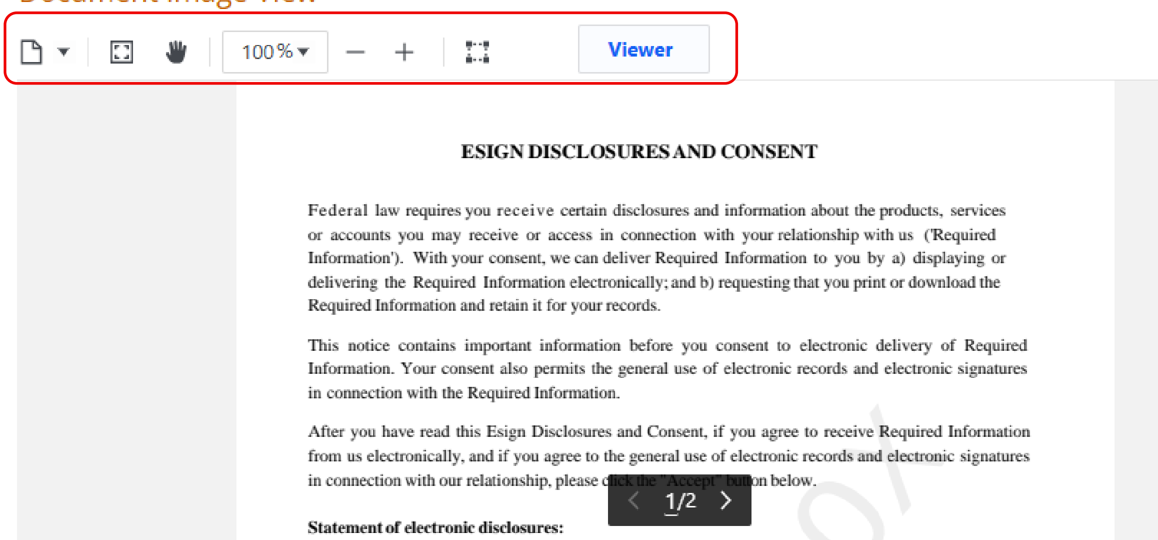
- These features work the same as they do on the *Document* > *List* screen.

### 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.

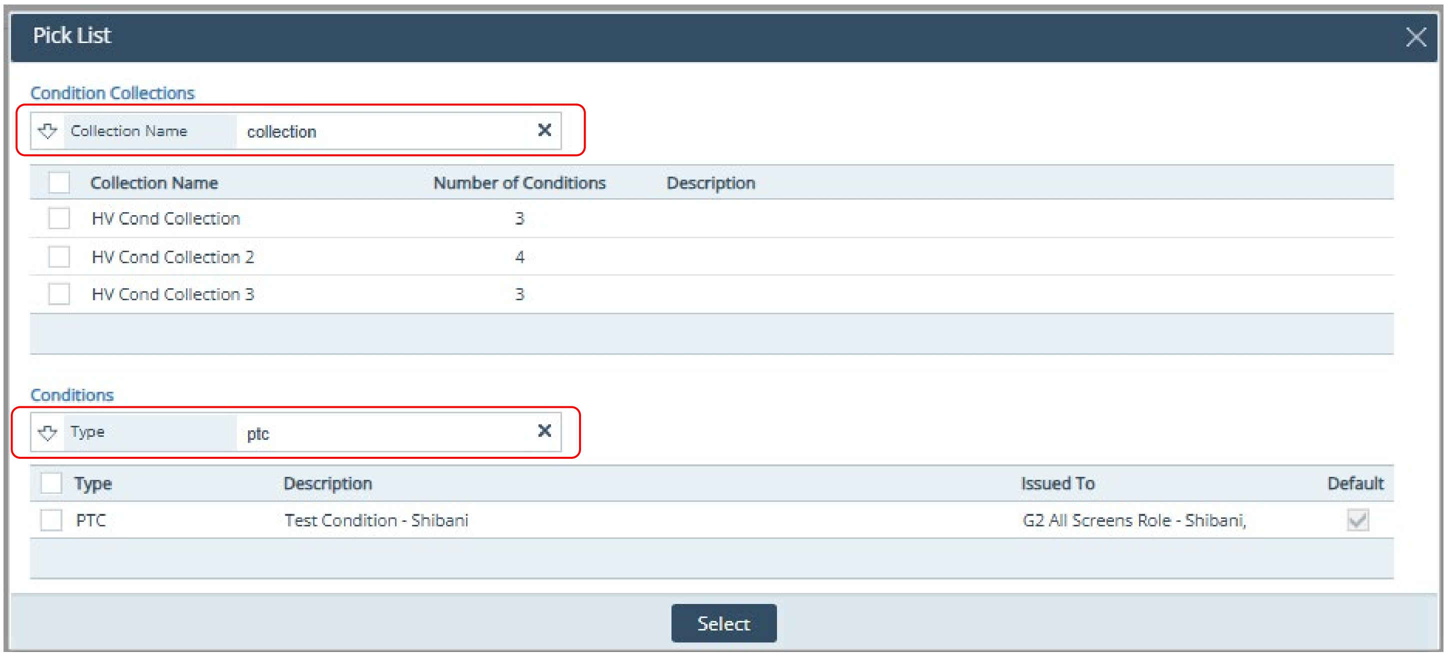
# Conditions

## 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*.

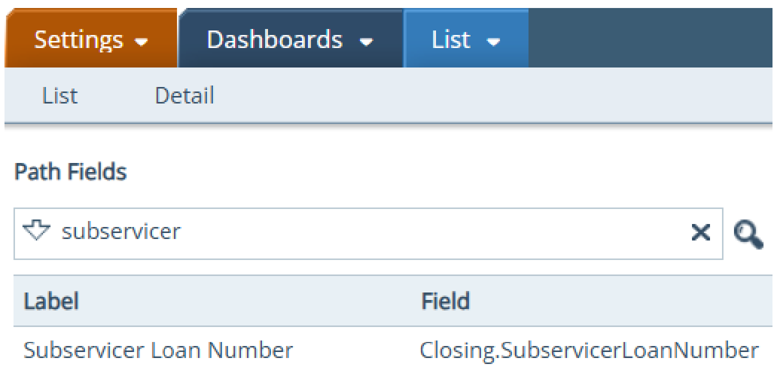
# Updates

## 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.

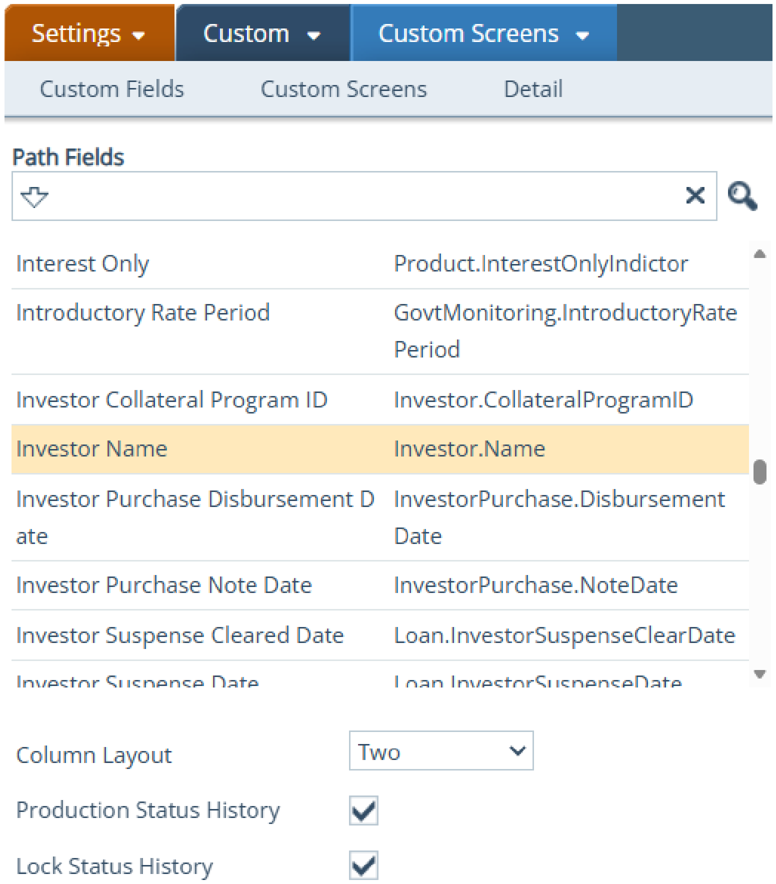
- **AUS.DUCasefileID** (field label: **DU Casefile ID**)
- **AUS.CaseNumber** (field label: **DU Case ID/LPA Key Number**)
- **AUS.LPDocClass** (field label: **LPA Doc Class (Freddie)**)

### Custom

#### Custom Screens

##### New Field (51568)

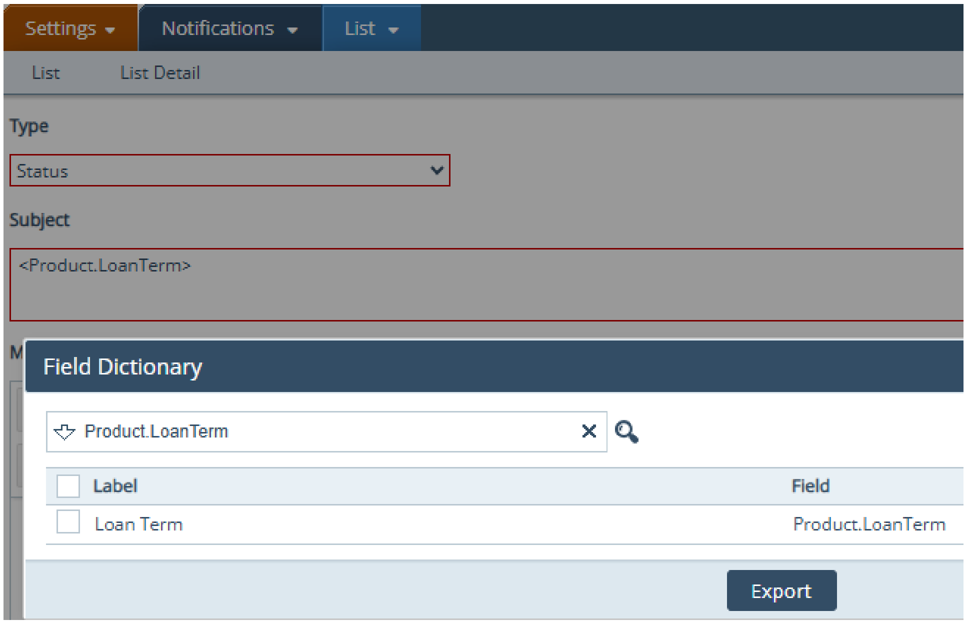
✓ Added **Investor.Name** (field label: **Investor Name**) as a field that can be added to custom screens.




# 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

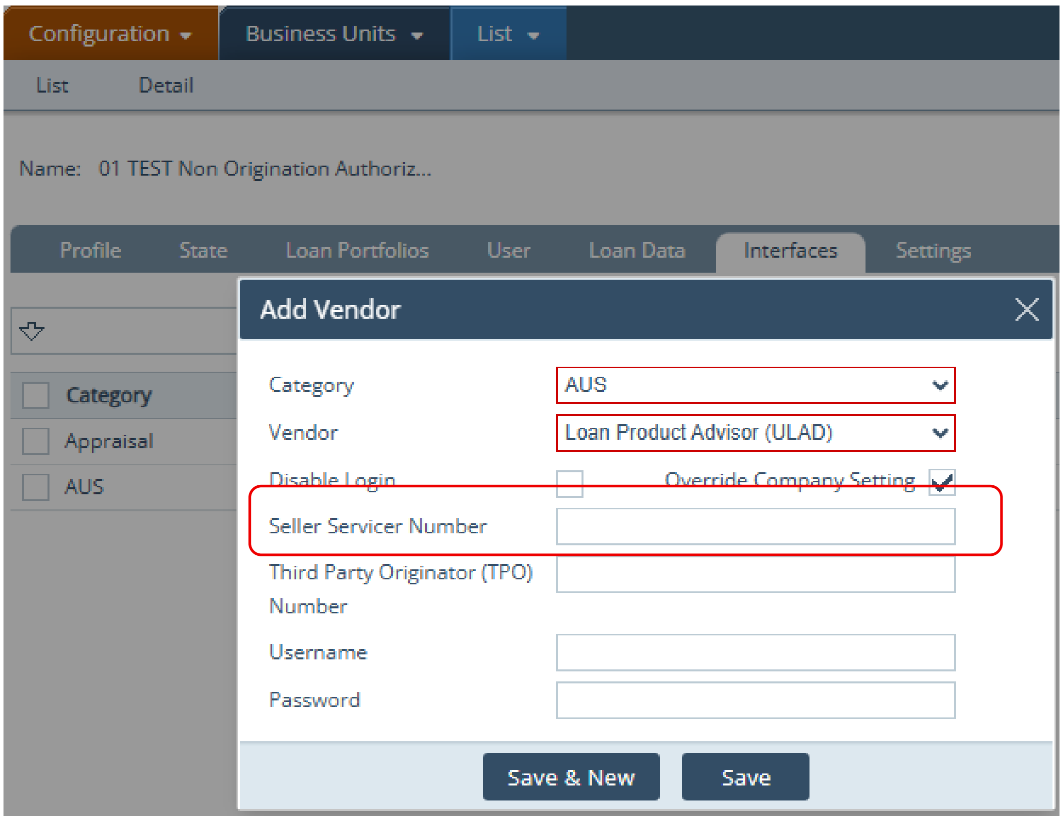
## Business Units

### Interfaces > Add/Edit Vendor Lightbox

#### Seller Servicer Number Update (51269)

**What's Updated**

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




**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.

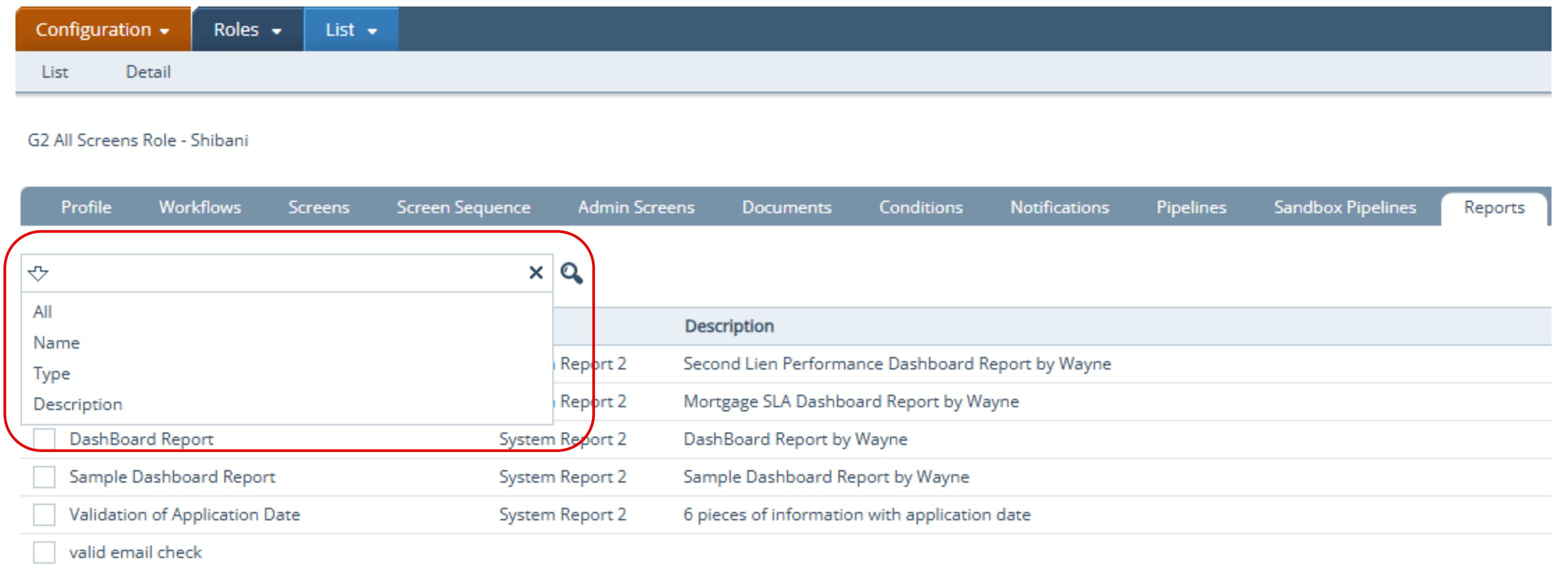
# Roles

## Reports

### New Search Function (49405)

**What's New**

✓ Added the search box and functionality.

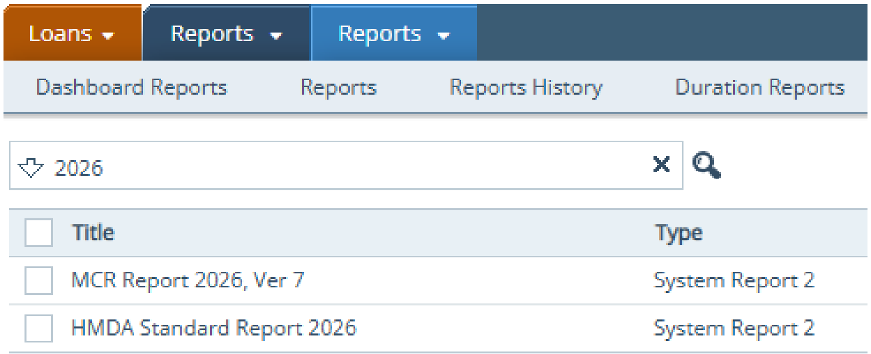



# Loans

## Reports

### New Reports

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




**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**

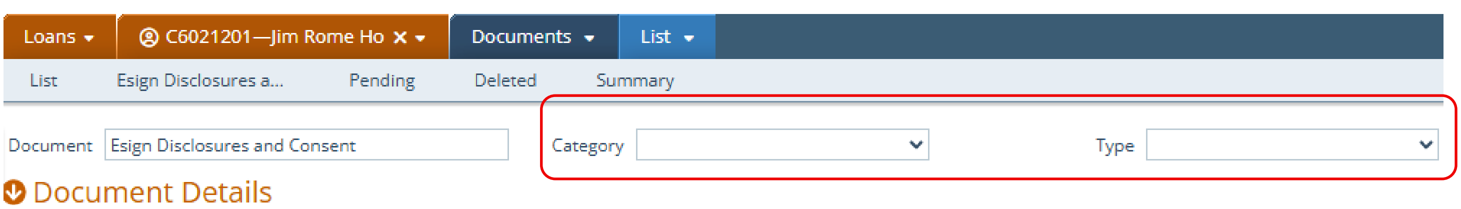
- For these reports to be available for use, the system admin should go to in *Configurations* > *Roles* > *Reports*.

## 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.




**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)

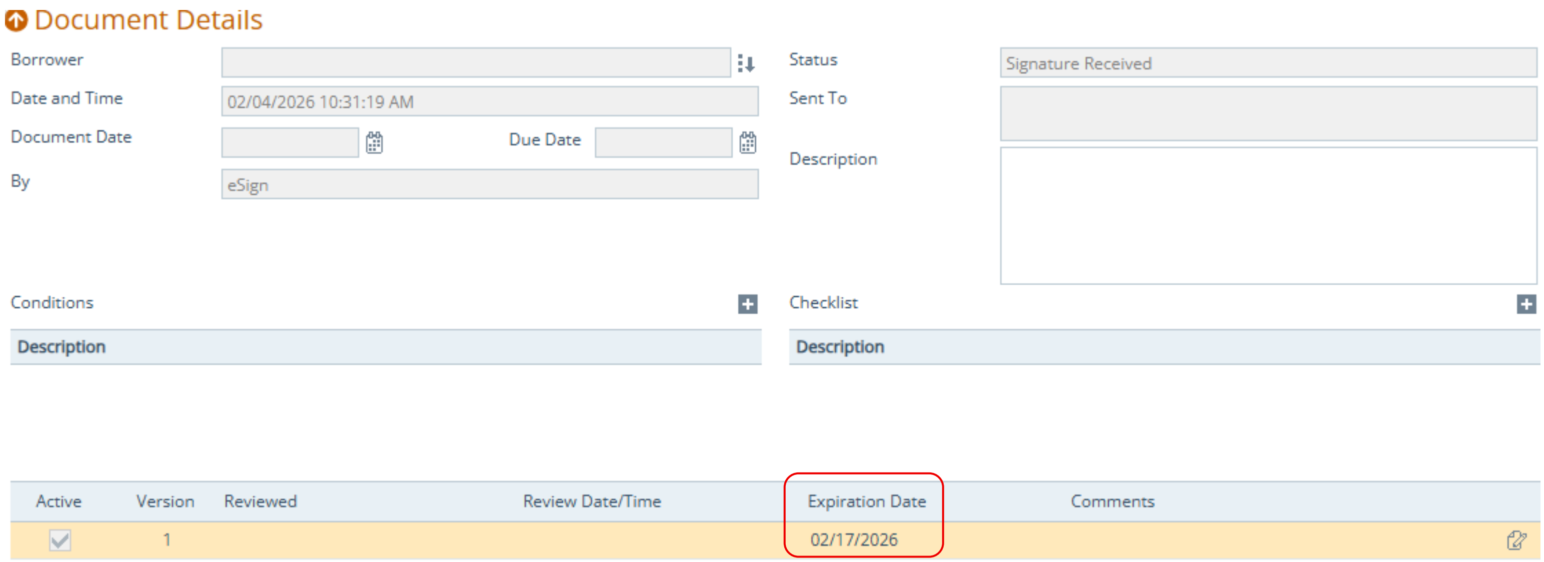
**What's Updated**

✓ 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.




### 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

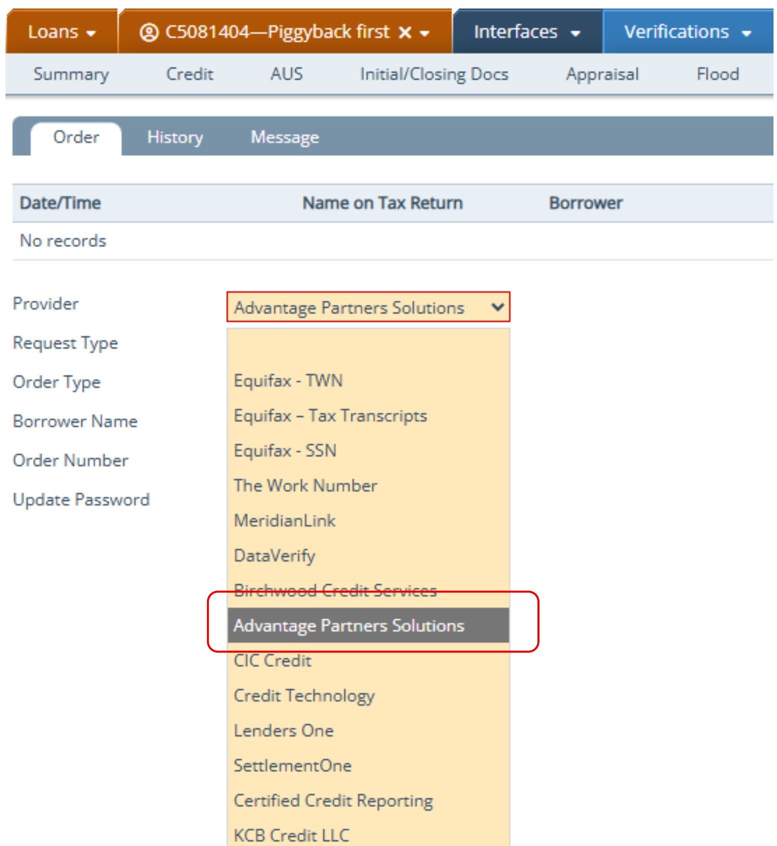
✓ Path now supports TLS 1.3, ensuring audit submissions proceed normally.

# Verifications Screen

## Provider List Update (51860)

### What's Updated

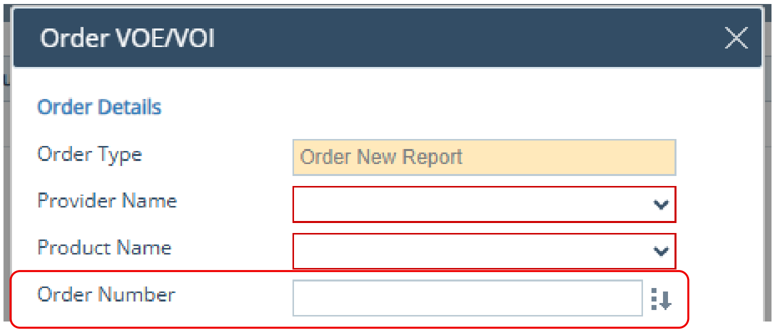
✓ *Advantage Credit* has been changed to **Advantage Partner Solutions**, in accordance with the company's rebranding.




## Order Number Field Update (51845)—Verified

### What's Updated

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




**Purpose**

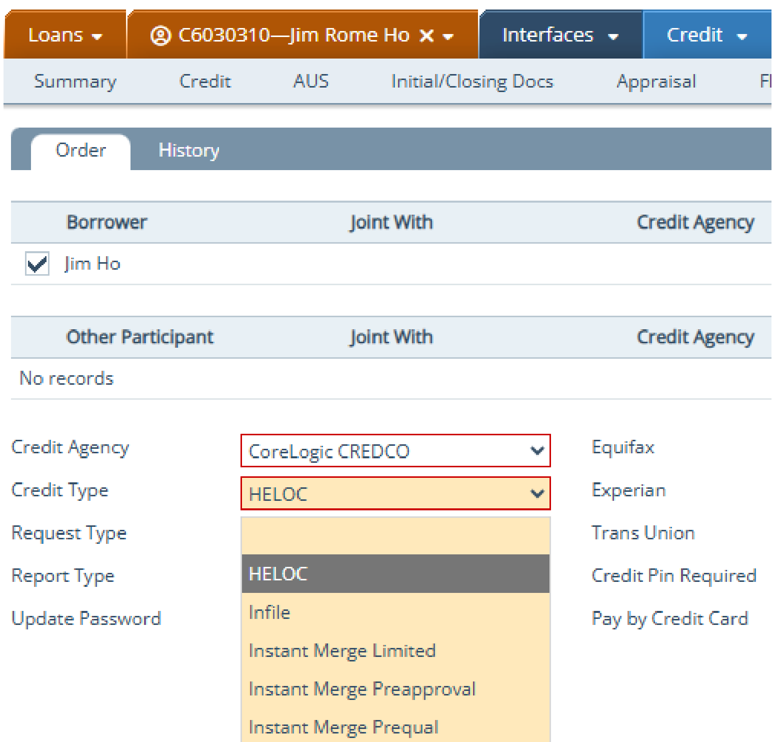
- To allow you to enter the previous order number when manually ordering VOE/VOI.

# Credit Screen

## HELOC Option for CoreLogic CREDCO (51758)

**What's New**

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

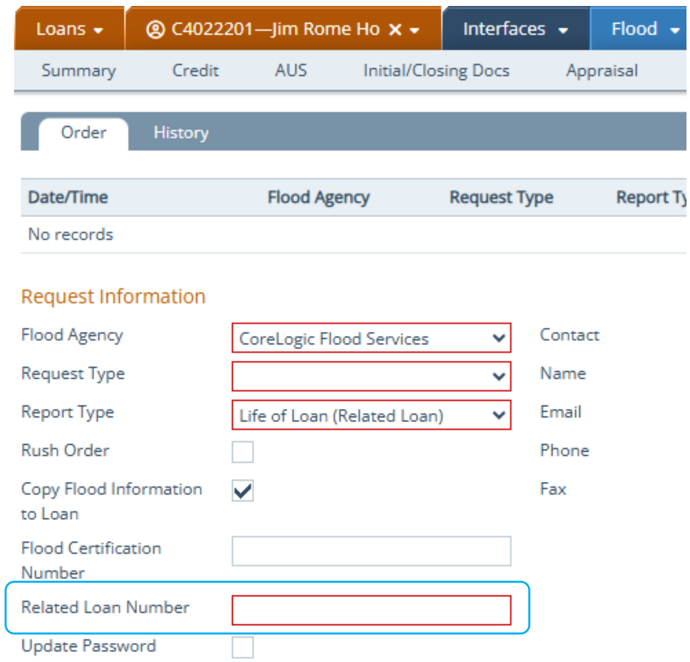


# Flood Screen

## Related Loan Number (51541)

### What's New

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




### Purpose and Usage

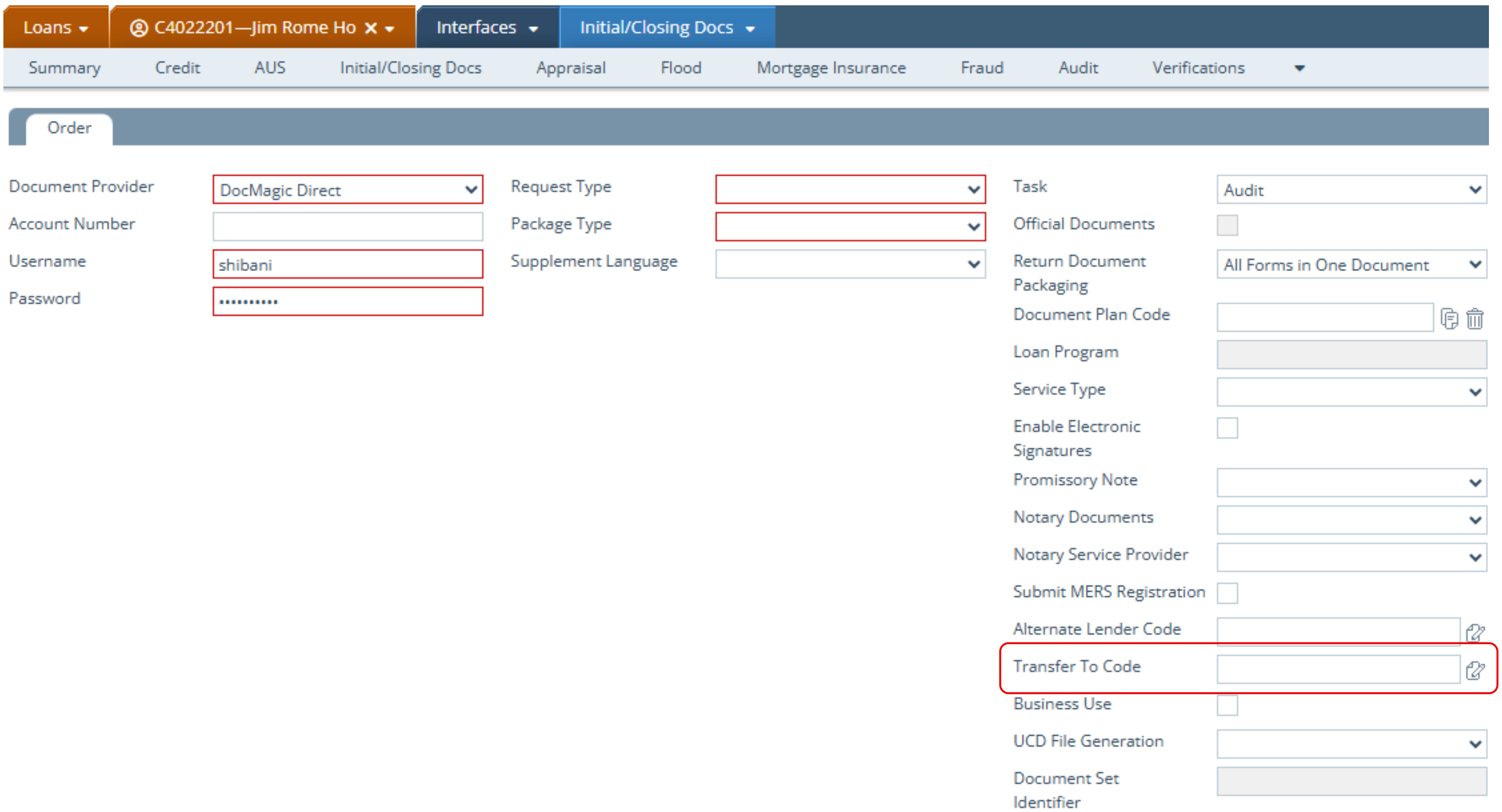
- To allow you to enter the related loan's loan number.
- The field is enabled when the following options are selected from the *Report Type* dropdown:
  - *Life of loan (Refinance Loan) with Census*
  - *Life of Loan (Related Loan) with Census*
  - *Life of Loan (Refinance Loan)*
  - *Life of Loan (Related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

# Initial/Closing Docs Screen

## Transfer To Code API (51374)

### What's New

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

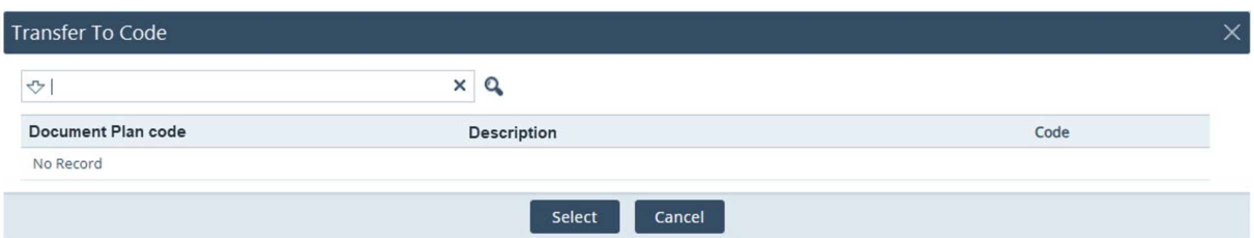



**Purpose**

– 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.




– 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.)

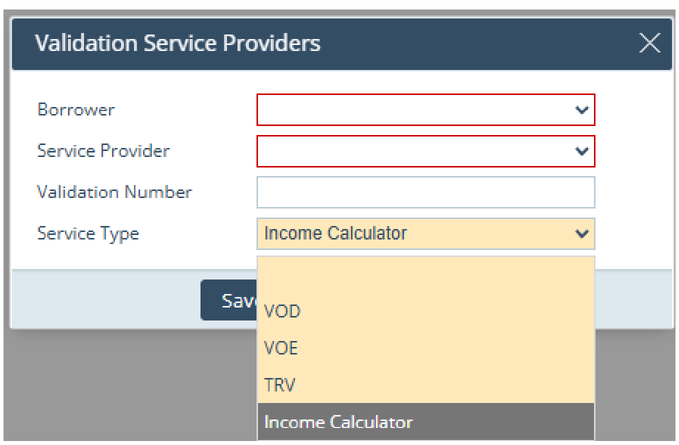
# AUS Screen > Desktop Underwriter Tab

## Validation Service Providers Lightbox

### Service Type Update (51216)

#### What's New

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

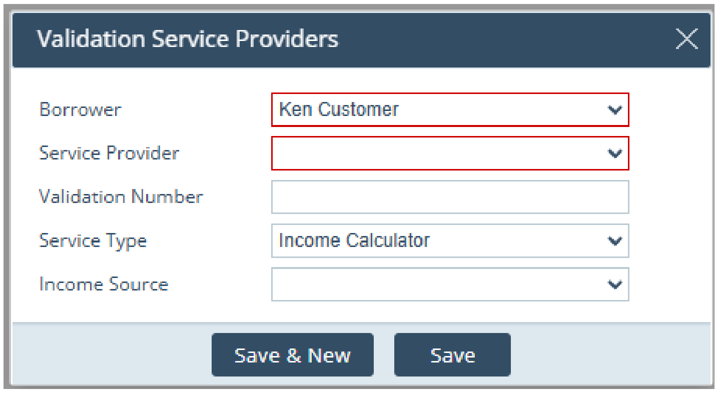



#### Purpose

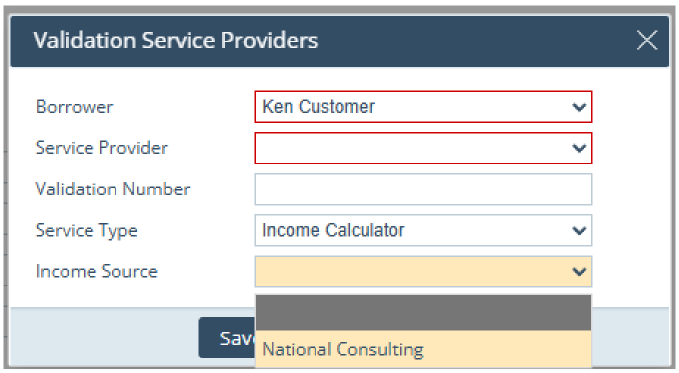
- To support Fannie Mae DU 1.9.1 specification.

#### Usage

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

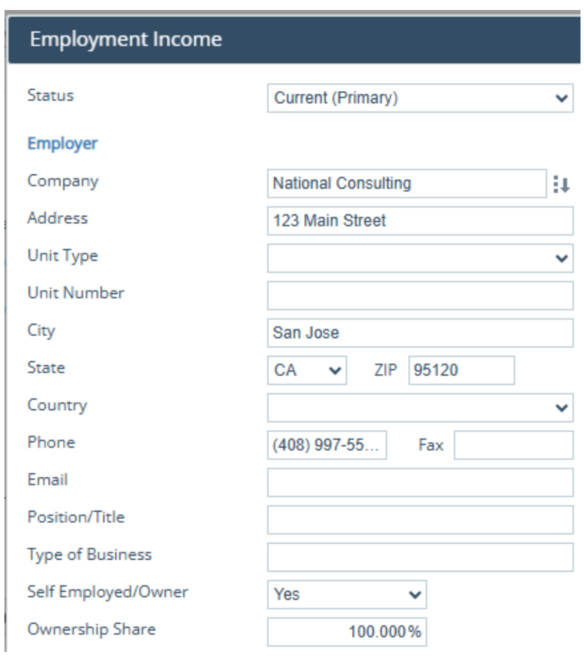



– The **Income Source** dropdown displays the source(s) of the borrower's self-employment income.




**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).

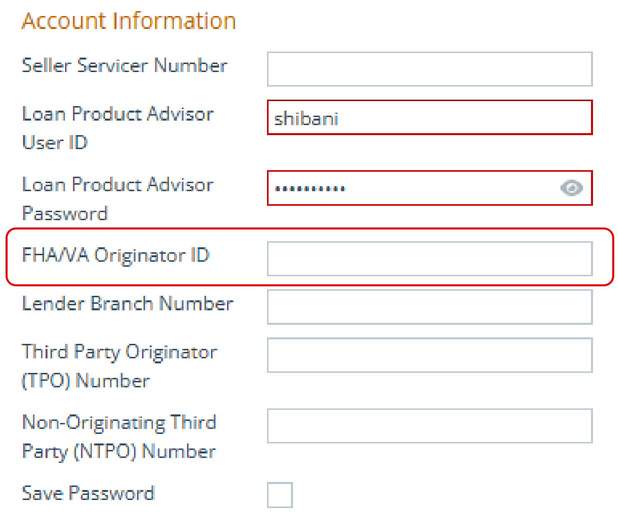
# AUS Screen > Loan Product Advisor (URLA) Tab

## Account Information Section

### FHA/VA Originator ID Update (51725)

#### What's Updated

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




#### Purpose

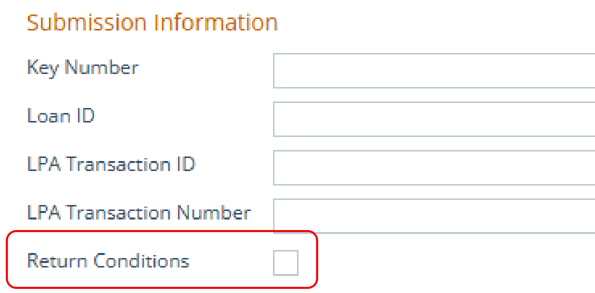
- Previously, this field was disabled along with the login fields, when the *Disable Login* box was checked in *Configuration* > *Business Units* > *Interfaces*.
- Now, this field is always enabled to allow users to enter this information, while the login credential fields remain disabled (read only)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

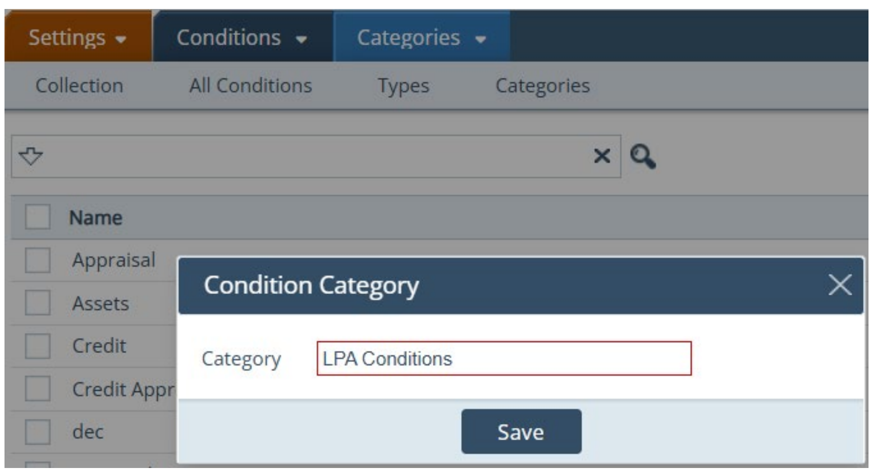



### Purpose and Usage

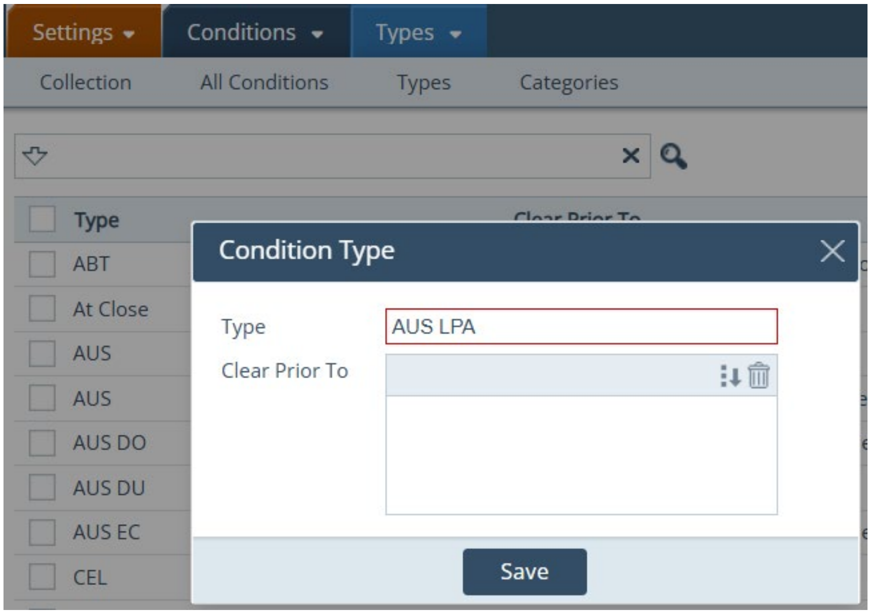
- Enable auto-import—select **Return Conditions** to pull conditions from LPA findings into Loans > Conditions.
- Disable auto-import—leave the checkbox cleared to prevent LPA conditions from being imported.

### Important (Prerequisite Setup)

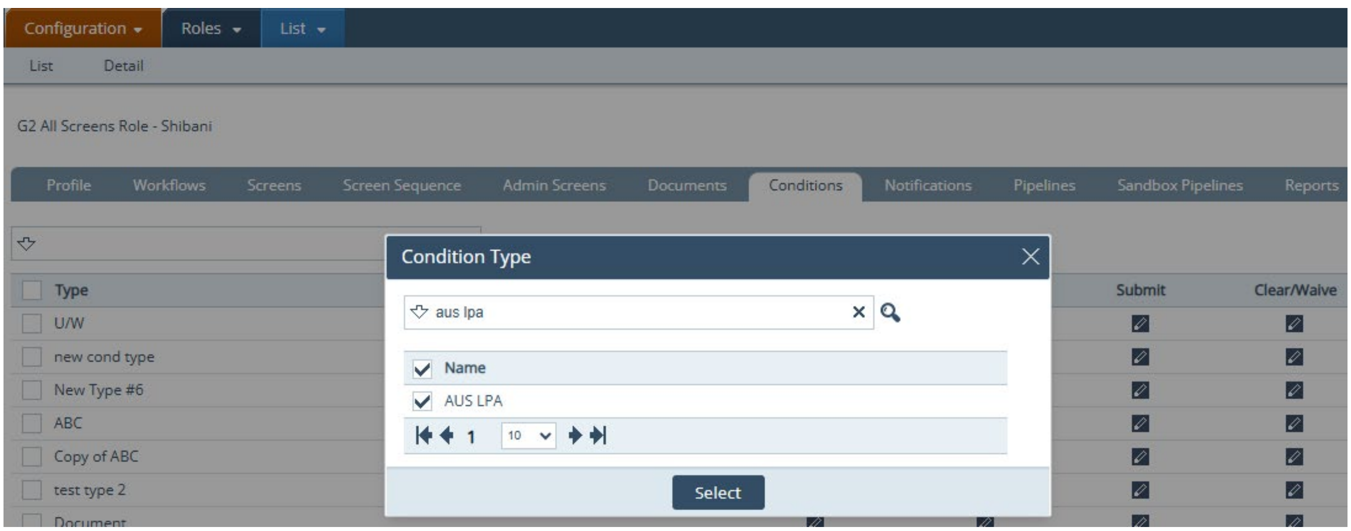
- For this feature to work, a system administrator must create the following exact entries in *Settings* > *Conditions* (spelling and spacing must match exactly) and *Configuration* > *Roles*:
  1. Add the condition category "LPA Conditions" in *Settings* > *Conditions* > *Categories*




  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

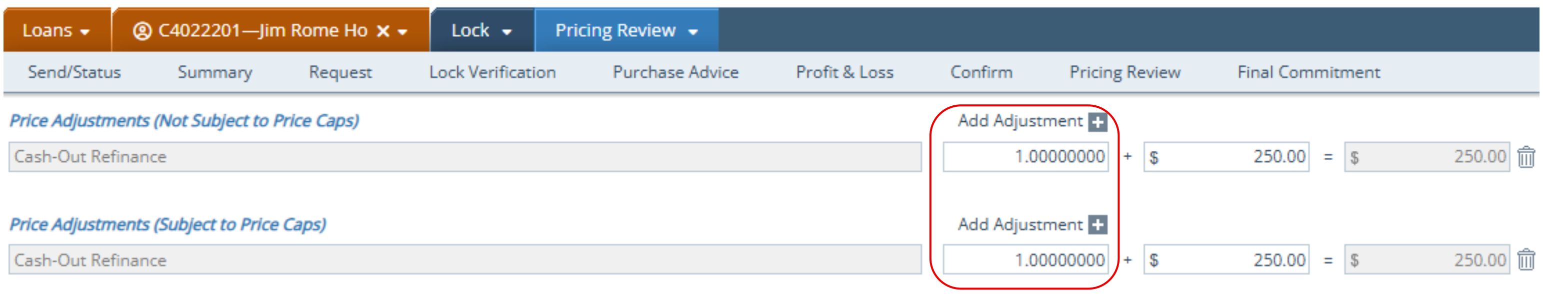
## Pricing Review Screen

### Buy Side Price Section

#### Add Adjustment Update (50845)

**What's Updated**

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




### Multiple Sections

#### Copy Icon Information (51864)

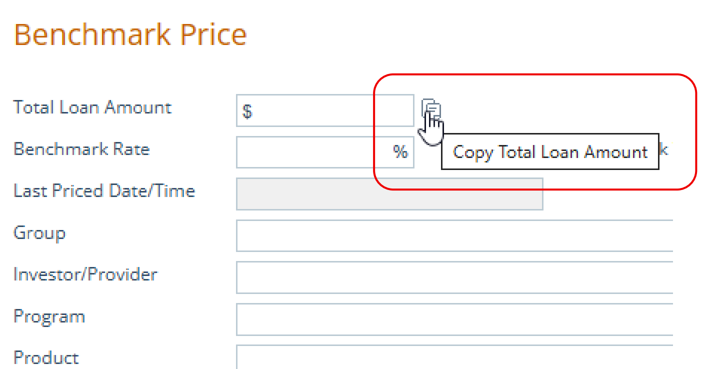
**What's Updated**

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

**Scope**

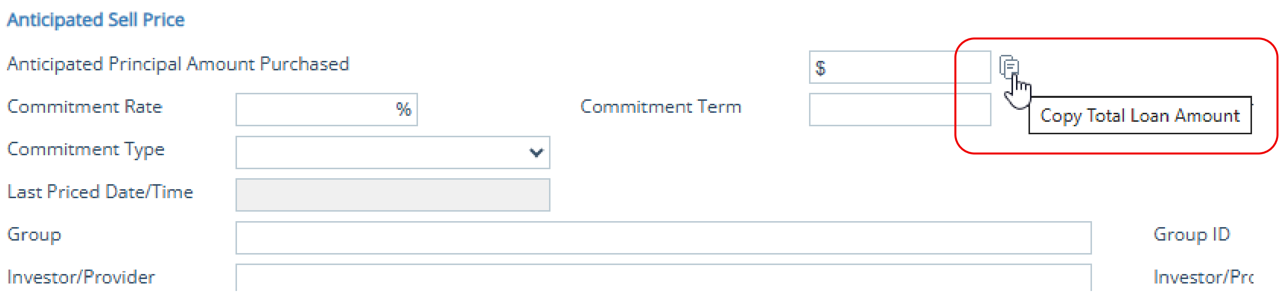
– The tooltip textbox applies to the following fields:

- *Total Loan Amount* (copies from the corresponding field on *Productions* > *Product & Pricing* screen)

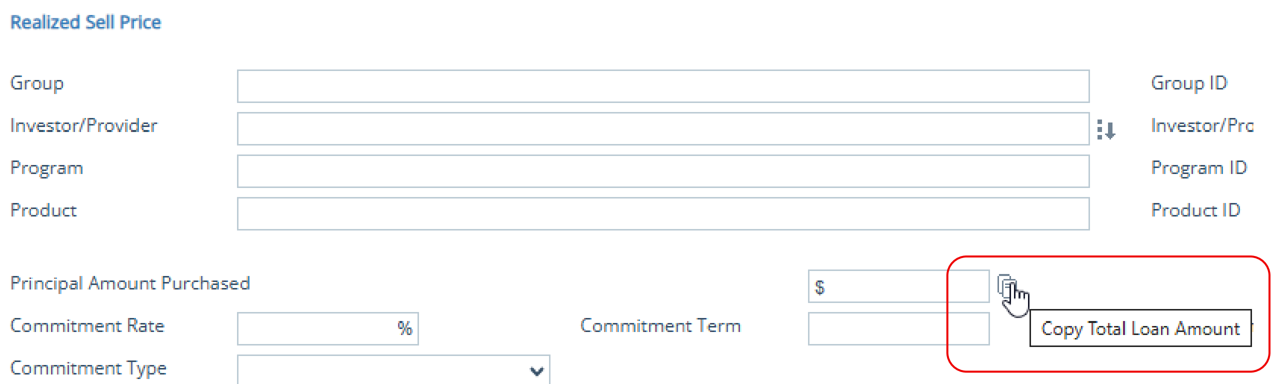



- *Anticipated Principal Amount Purchased*

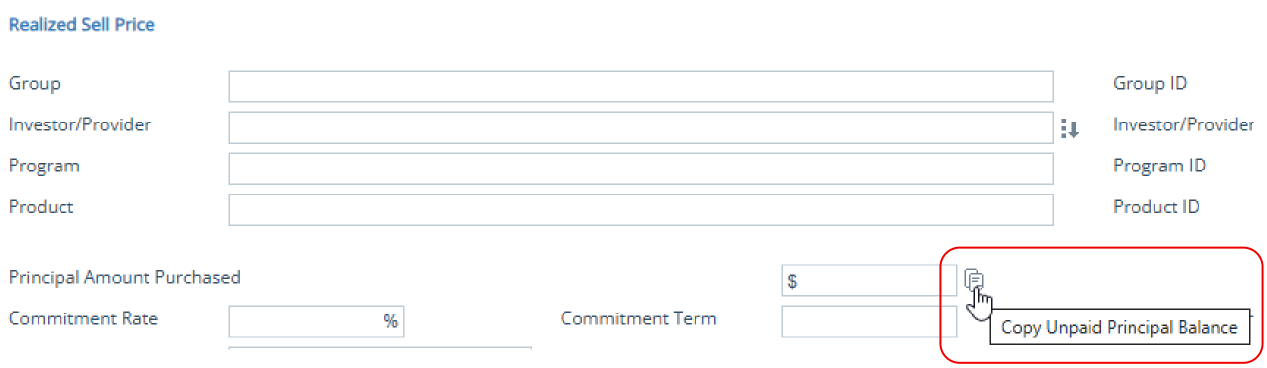
### Sell Side Price




- *Principal Amount Purchased*




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



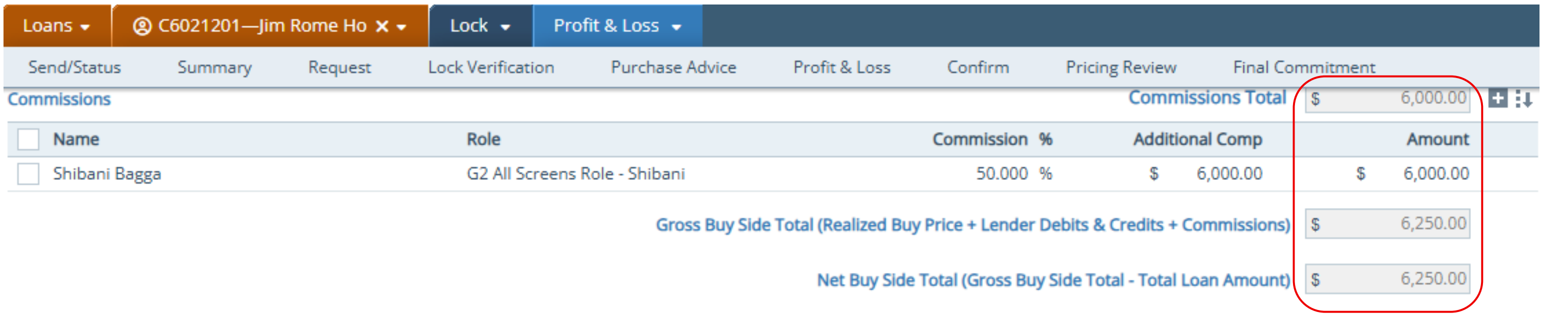

# Profit & Loss Screen

## Buy Side Price Section

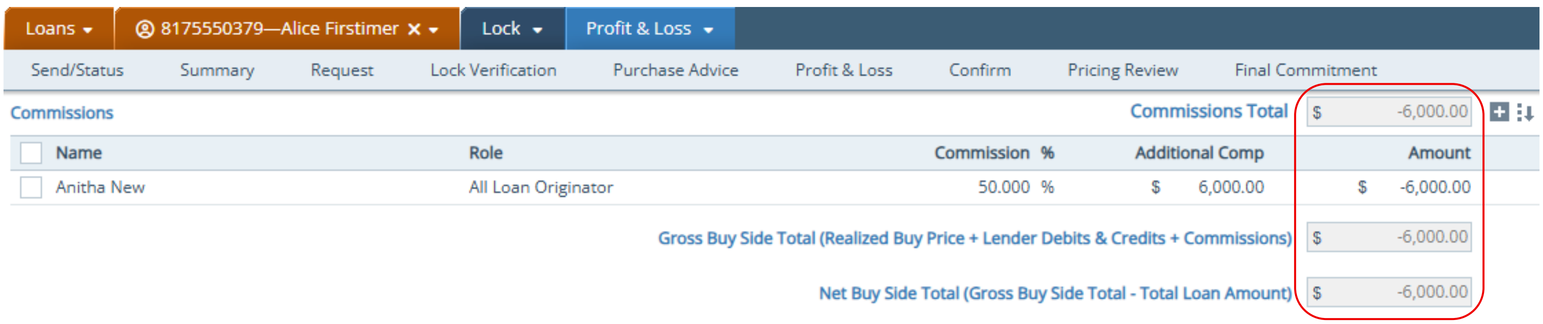
### Commission Values Update (51688)

**What's Updated**

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




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




- 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**

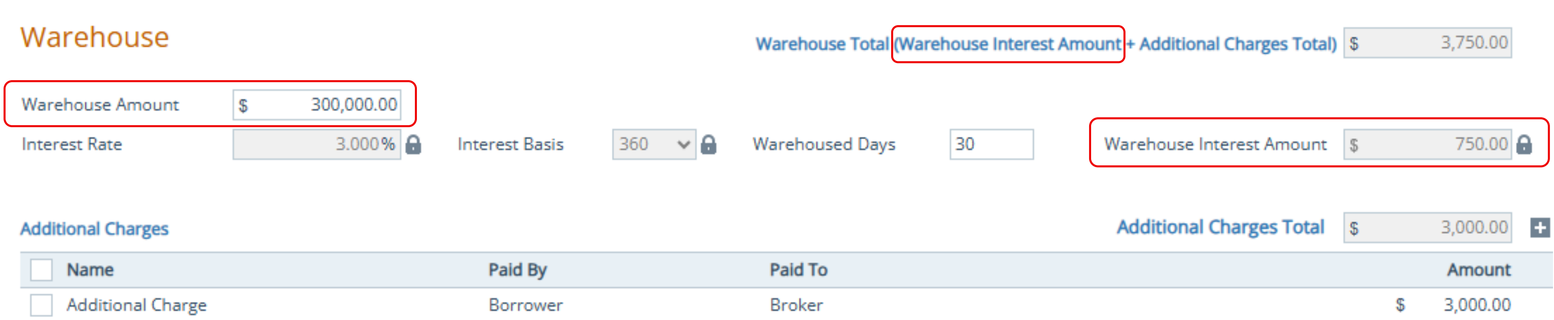
✓ *Warehouse Haircut Amount* has been relabeled to **Warehouse Interest Amount**, and its calculation has been updated.

- 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.



**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

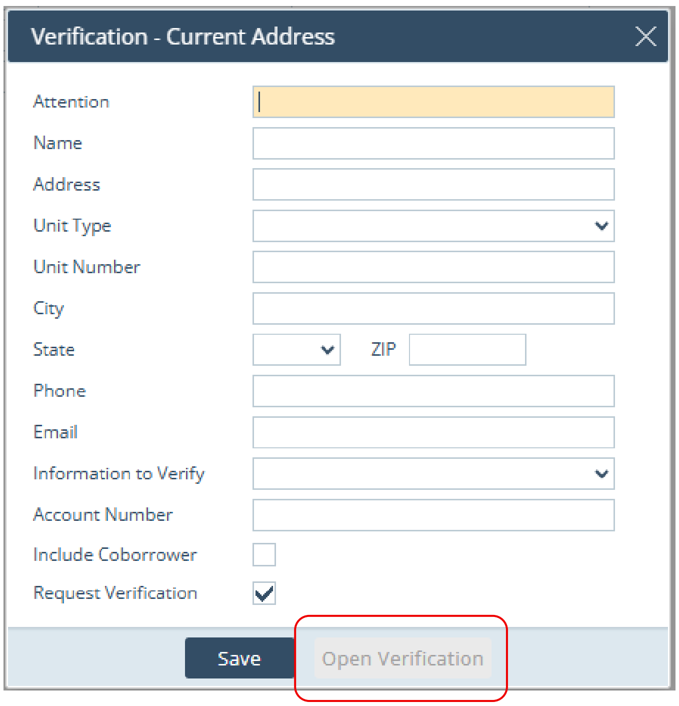
## Borrower Screen

### 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.




**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**

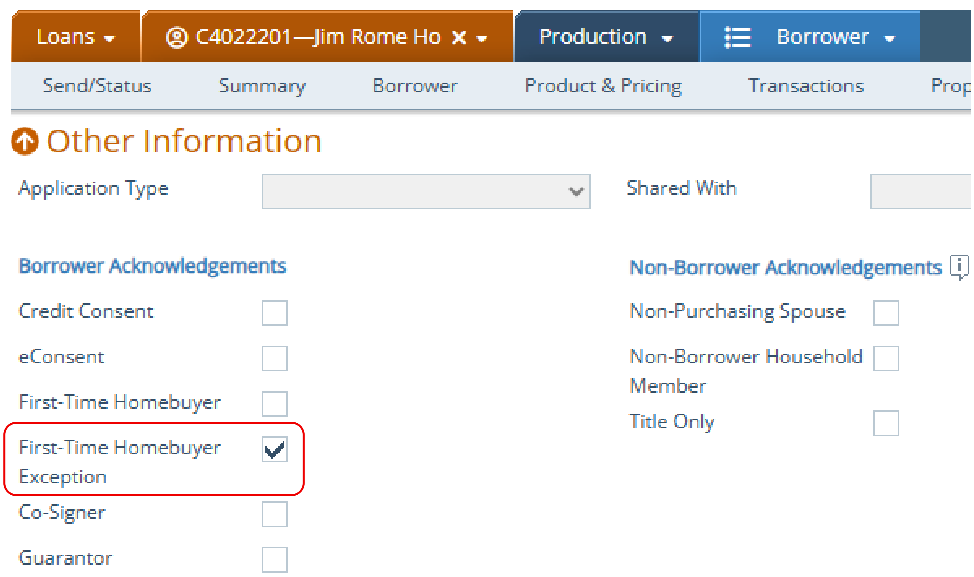
The administrator can enable or disable a role's access to the *Verifications* screen in *Configuration > Roles > Screens*.

## 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.



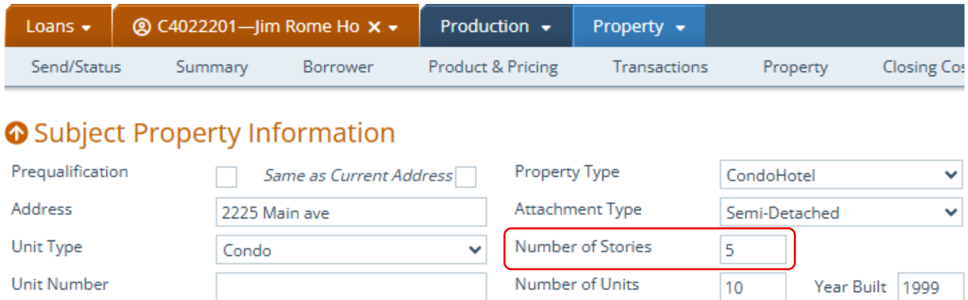

# Property Screen

## 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.



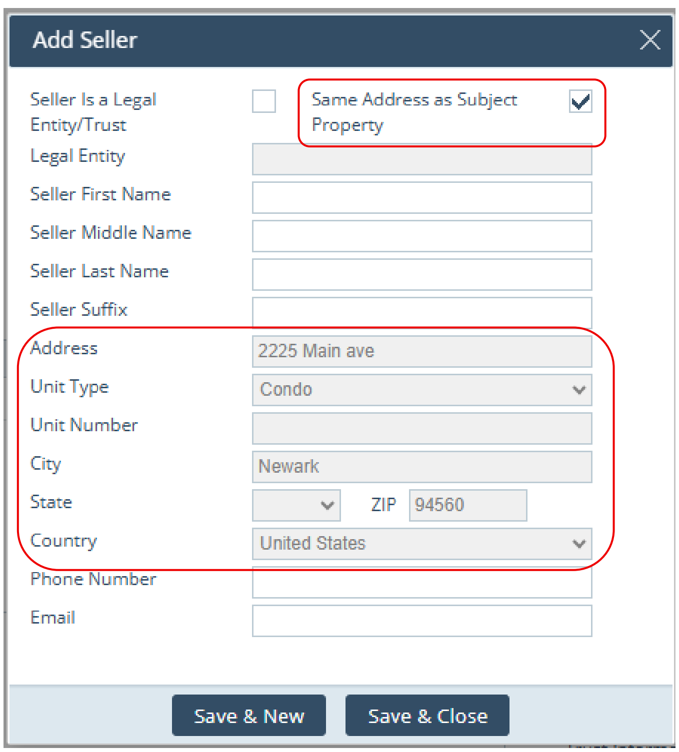

– This field matches (and syncs with) the corresponding field on the *Product & Pricing* screen > *Pricing Search Parameters* lightbox.

## Seller Section > Add/Edit Seller Lightbox

### Same Address as Subject Property Checkbox (49951)

#### What's New

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




#### 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

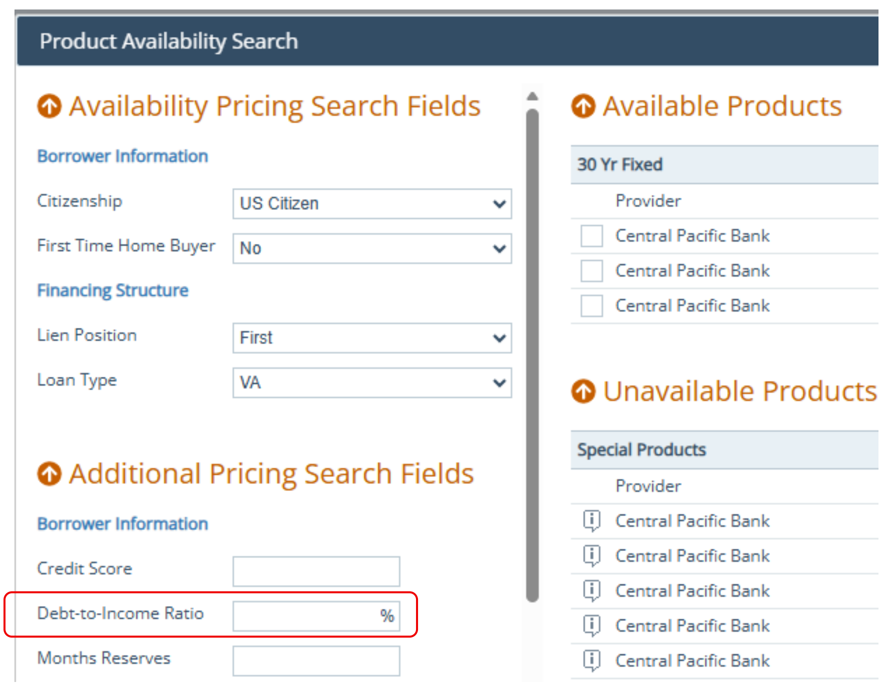
## Product Availability Search and Pricing Search Parameters Lightboxes

### DTI Fields Update (51720)

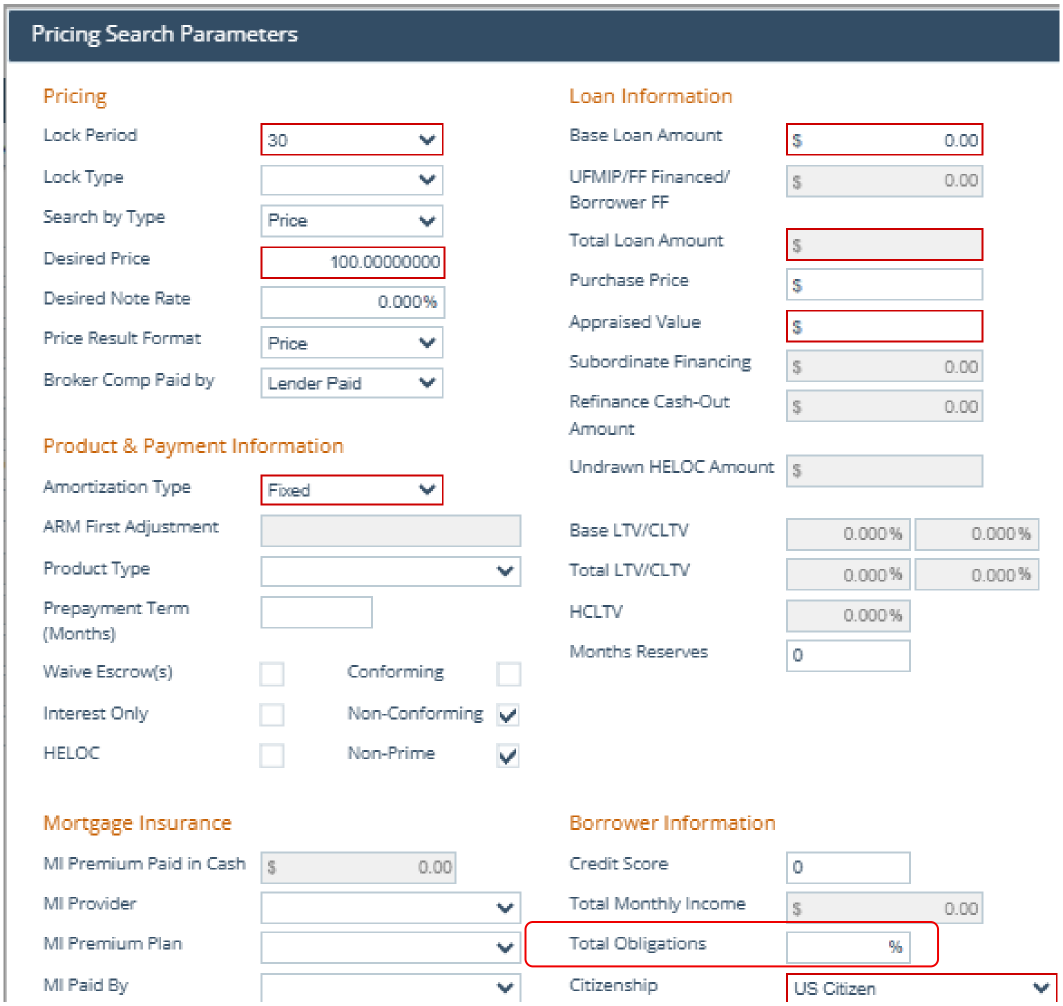
**What's Updated**

✓ Updated the DTI-related fields to always be editable

- *Product Availability Search* > *Debt-to-Income* Ratio.




- *Pricing Search Parameters* > *Total Obligations*




**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**

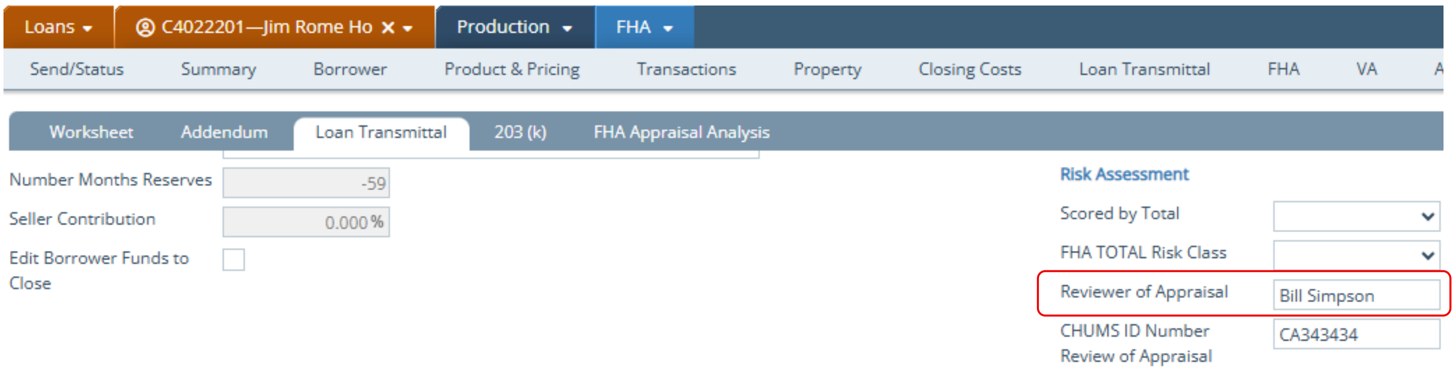
✓ Updated the calculations for the *Loan Maturity Date* field for HELOC loans to be based on the *Note Date* instead of the *First Payment Date*.

# FHA Screen > Loan Transmittal and FHA Appraisal Analysis Tabs

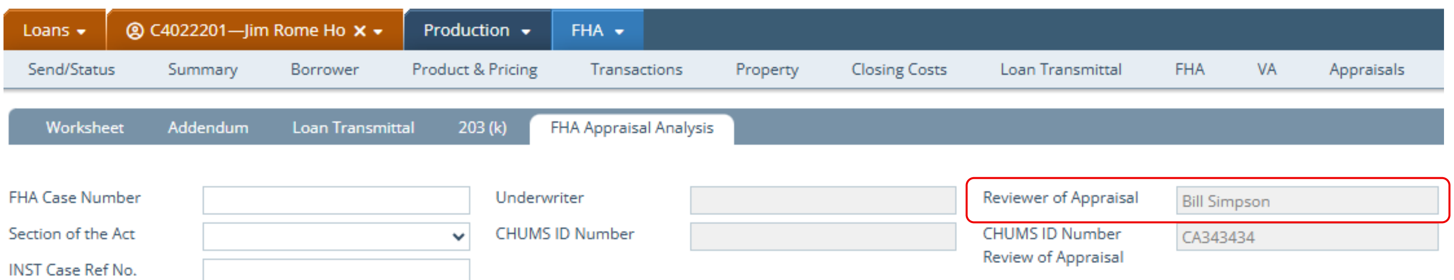
### Reviewer of Appraisal Field (51567)

**What's New**

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




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




**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.

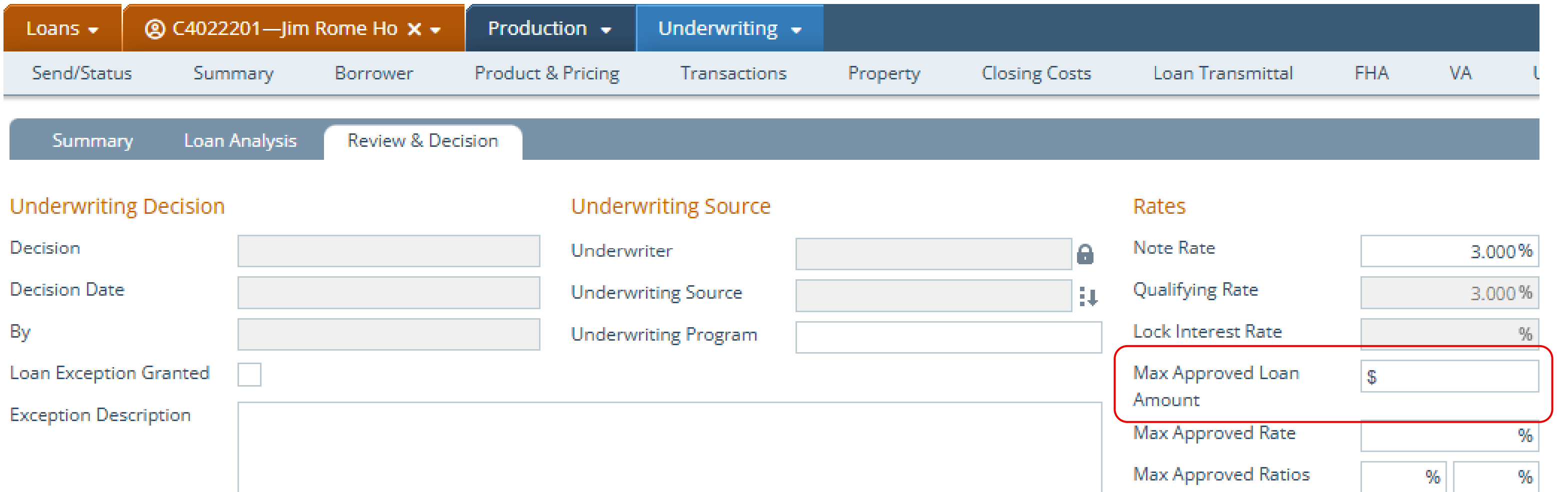
# Underwriting Screen > Review and Decision Tab

## Rates Section

### Max Approved Loan Amount Field (51272)

**What's New**

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



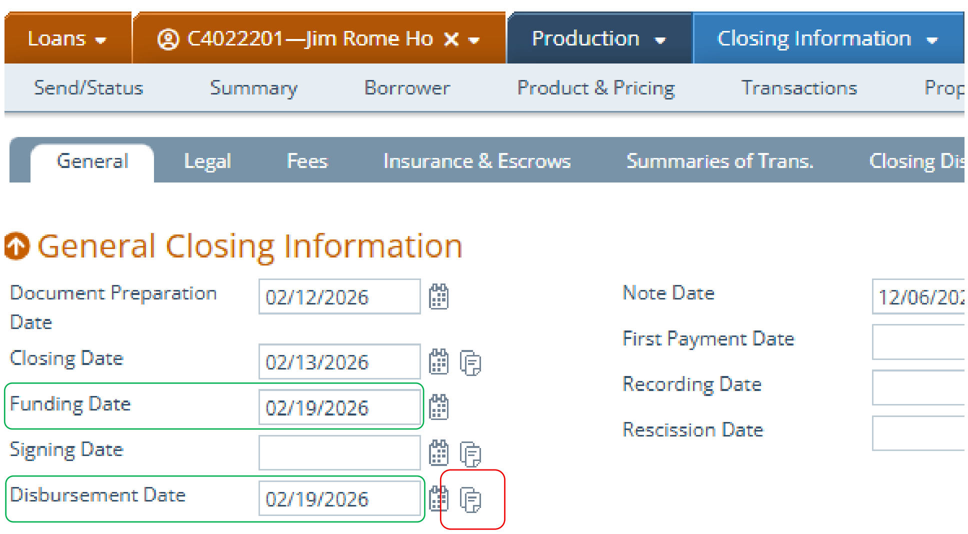

# Closing Information Screen > General Tab

## General Closing Information Section

### Disbursement Date Copy Icon (50187)

#### What's New

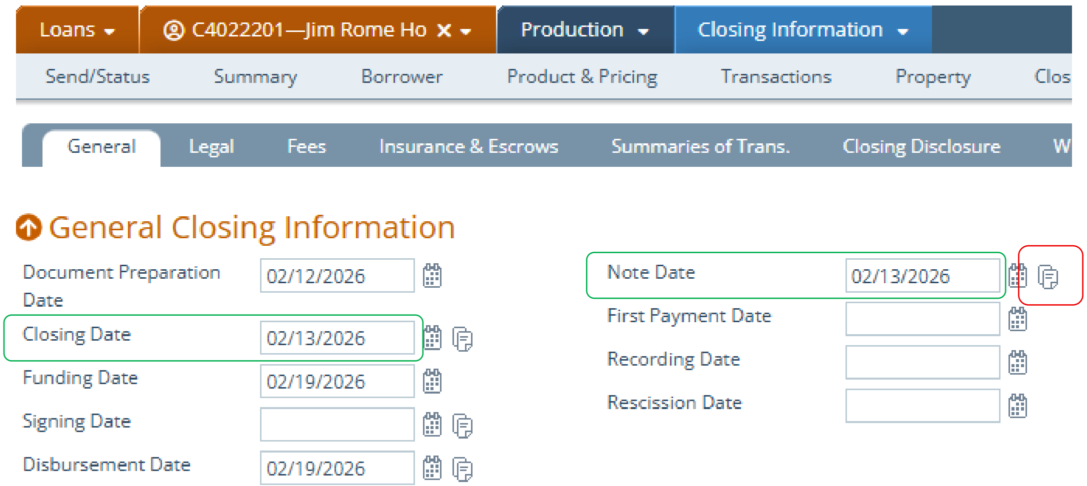
✓ Added the copy icon to the *Disbursement Date* field, which copies the *Funding Date*, useful for situations when the two dates are the same.




### 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.



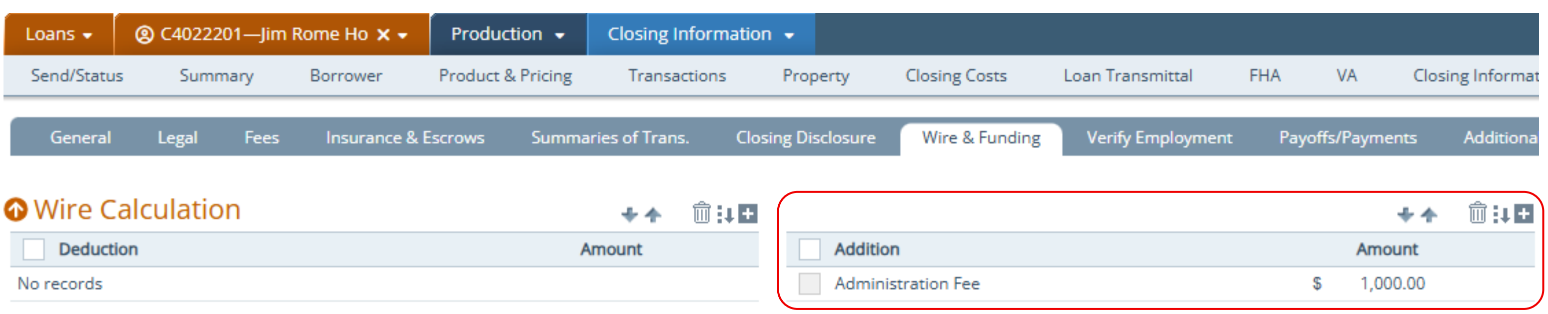

# Closing Information Screen > Wire & Funding Tab

## 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.



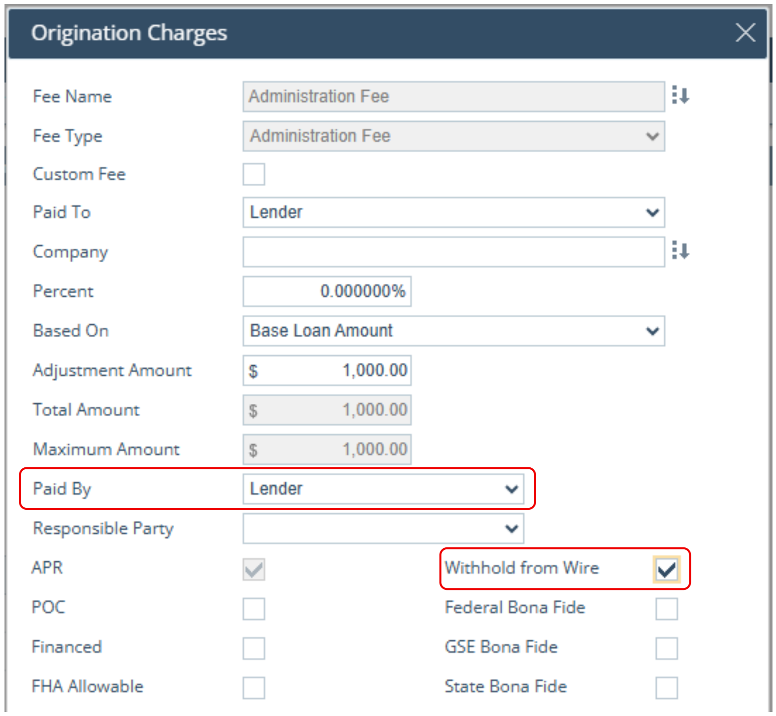

**Requirement**

– 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.



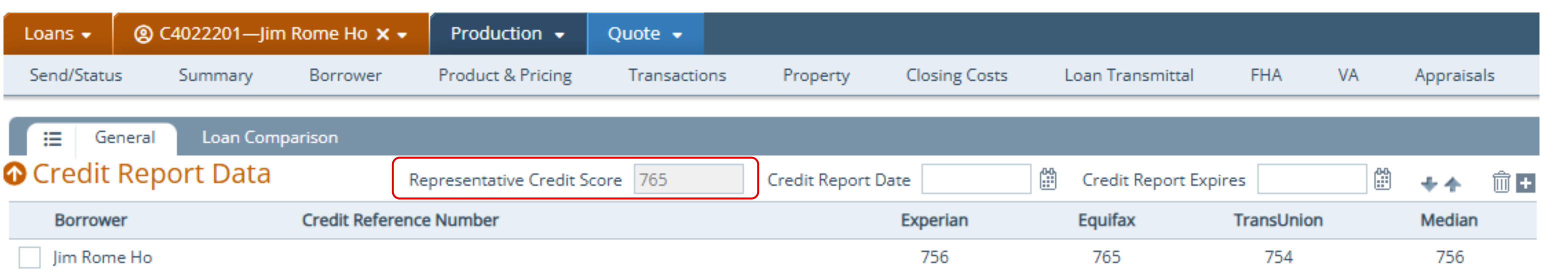

# Quote Screen > General Tab

## 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).



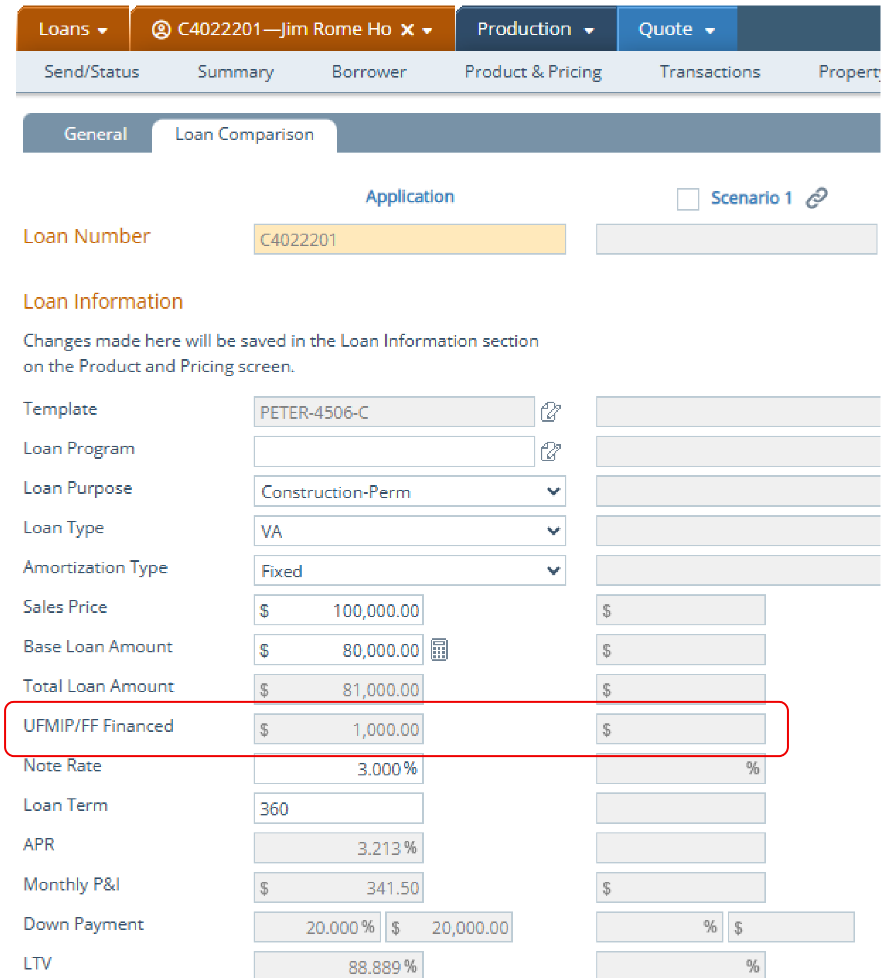
# Quote Screen > Loan Comparison Tab

## Loan Information Section

### UFMIP/FF Financed Field (51620)

#### What's New

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




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

## Ratios Section

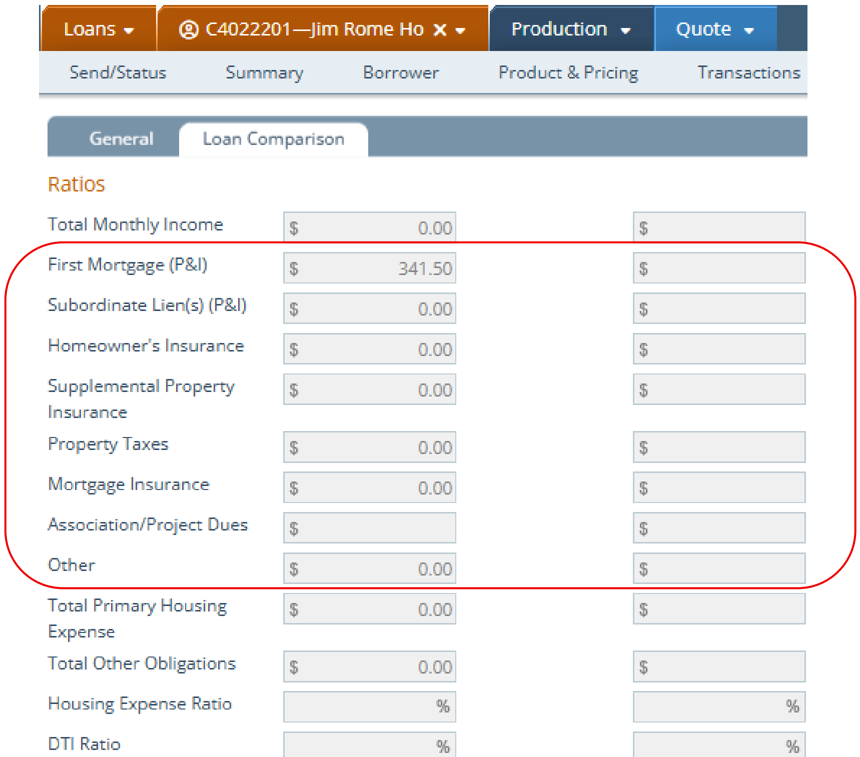
### New Fields (50539)

✓ 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**



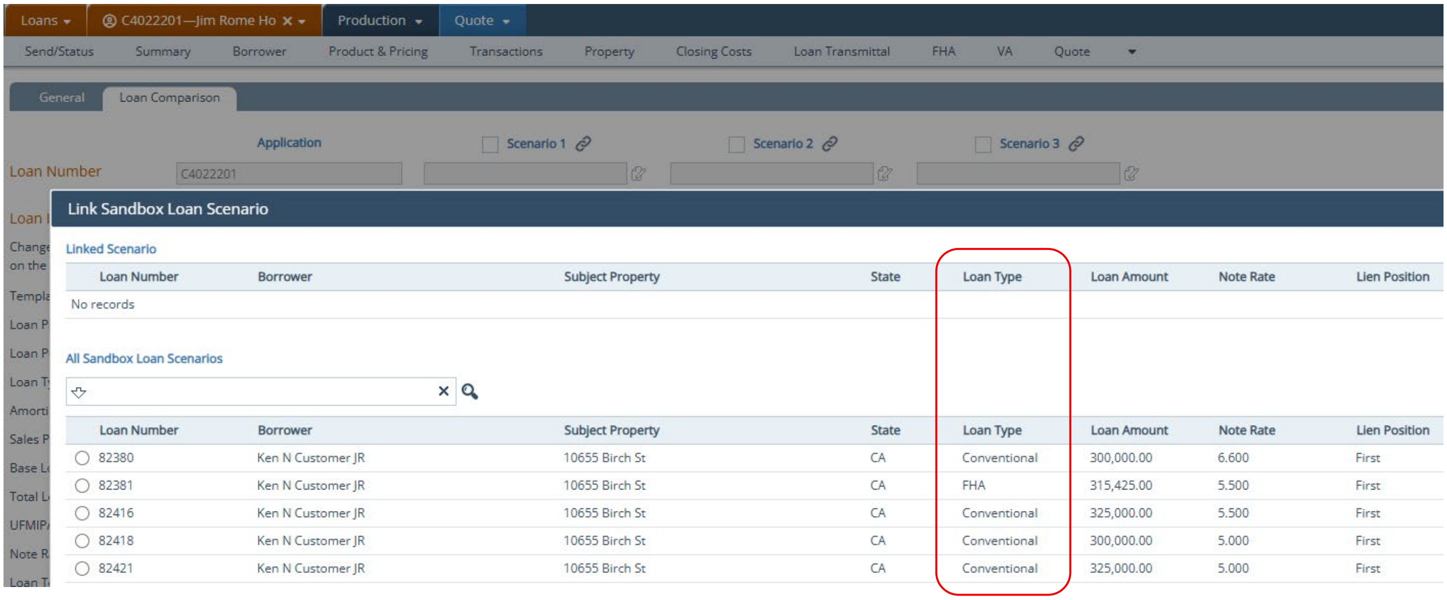

- These fields matches with the corresponding fields on the *Transactions* screen > *Proposed Monthly Payment* section.
- Only the first column displays synced loan data. The other three columns display the loan scenario data from linked loans from the *Sandbox*.

## Link Sandbox Loan Scenario Lightbox

### Loan Type Column (51622)

#### What's New

✓ Added the **Loan Type** column.




# 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).

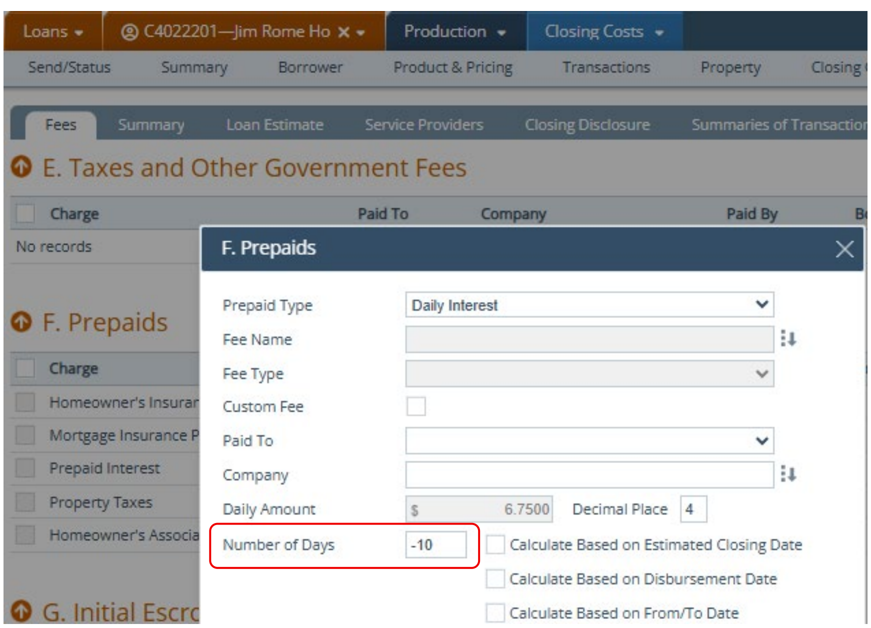
# Production and Compliance

## 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.

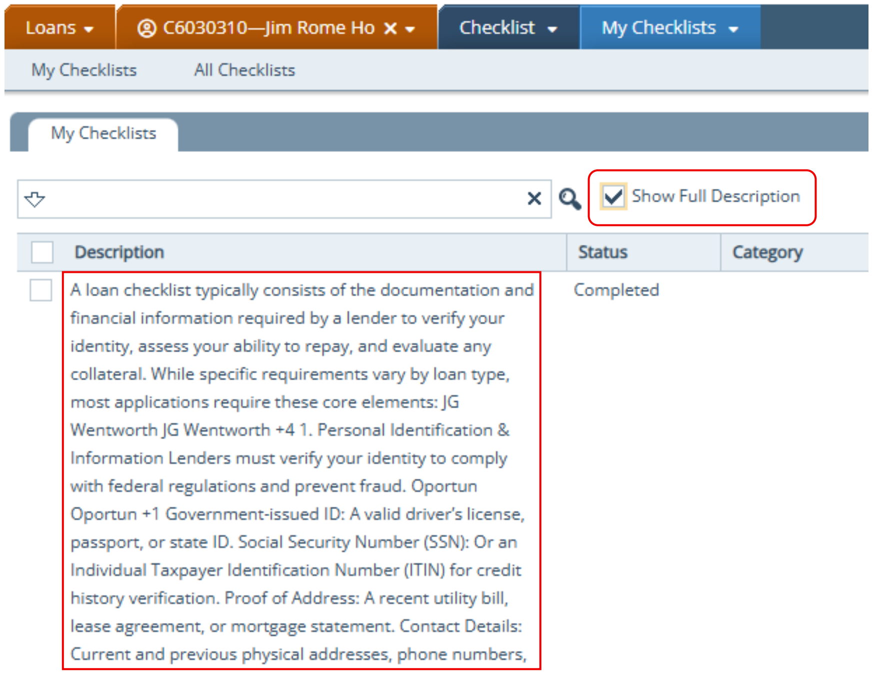
- This update applies to the following *Interfaces* screens:
    - *Credit*
    - *AUS*
    - *Initial/Closing Docs*
    - *Flood*
    - *Mortgage Insurance*
    - *Fraud*
    - *Audit*
    - *Verifications*
    - *UCD*

# Checklist

## Show Full Description Checkbox (51666)

**What's New**

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




### 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 Rule*s, 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 from.

**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 Payment*s.

**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.