



# **RELEASE NOTES**


## January 2026

# Path Service Pack 1 Release Notes

January 2026

This Path release is scheduled for production release on January 11<sup>th</sup>, 2025, 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 .

# Enhancements and Updates

## Loans

### Pipeline

#### My Active Screen (New)

✓ (51517)

Added the new **My Active** screen, which provides users access to their own loans.

Loans

Pipeline

My Active

Desk

Cabinet

Role Desk

Role Cabinet

Active

Archive

Inactive

My Archive

My Active

x

Q

Advanced Search

MyActive (194)

<div><div></div><div></div></div>	Loan Number	Loan Service	LO Name	OU Name	Borrower First	Subject Property	Loan Status	Loan Sub-Status	Lock Expiration	Loan Amount	Note Rate	Loan Type	Loan Purpose
<div><div></div><div></div></div>	P2511141	11204	Petlum Sae...	Petlum Tes...	John smith		Application...			0.00	0.000		
<div><div></div><div></div></div>	P2412131	10199	Petlum Sae...	Petlum Tes...			Application...			0.00	0.000		
<div><div></div><div></div></div>	P2404042	8948	Petlum Sae...	Petlum Tes...	John M Ho...	6499 Trinid...	Application...			300,000.00	7.000	Conventio...	Constructi...
<div><div></div><div></div></div>	P2404032	8932	Petlum Sae...	Petlum Tes...	John M Ho...	123 Disney...	Application...			300,000.00	7.000	Conventio...	Constructi...
<div><div></div><div></div></div>	P2404021	8924	Petlum Sae...	Petlum Tes...	TestFirst T...		Application...			0.00	0.000		
<div><div></div><div></div></div>	P2404012	8919		Petlum Tes...	John M Ho...	123 Disney...	Application...			300,000.00	7.000	Conventio...	Constructi...
<div><div></div><div></div></div>	P2403262	8880	Petlum Sae...	Petlum Tes...	John M Ho...	123 Disney...	Application...			300,000.00	7.000	Conventio...	Refinance
<div><div></div><div></div></div>	P2309202			Petlum Tes...	John M Ho...	123 Disney...	Application...			300,000.00	7.000	Conventio...	Refinance
<div><div></div><div></div></div>	P2309201	8501	Petlum Sae...	Petlum Tes...	John M test	123 Disney...	Application...			300,000.00	7.000	Conventio...	Purchase

- System administrators need to enable this screen in *Configuration > Roles > Pipeline > Views*.

## Production

#### Property Screen

✓ (51586)

Updated the display format of the *Census Tract* field to remove the decimal point.

#### Loan Transmittal and Underwriting Screens

✓ (51476)

Added the **CPM Certification ID** and **CPM Phase ID**, to support Fannie Mae ULDD Phase 5.

- *Loan Transmittal* screen > *I. Borrower and Property Information* section.

Loans ▾	@ P2107221—Patrick P test, Jr ✕ ▾	Production ▾	Loan Transmittal ▾							
Send/Status	Borrower	Property	Product & Pricing	Transactions	Contacts	Summary	USDA	Closing Costs	Loan Transmittal	Underw

## ↑ I. Borrower and Property Information

Borrower		Subject Property		Project Classification	
First Name	Patrick	Address	1234 Main	Unit Number	
Middle	P	Unit Type		Project Name	
Last Name	test	Unit Number		Fannie Mae	
Suffix	Jr	City	Baltimore	Freddie Mac	
SSN	999-12-1234	State	MD ▾ ZIP 20600-1234	CPM Project ID	
		Property Type		CPM Certification ID	
		Number of Units	1	CPM Phase ID	
		Occupancy	Primary Residence ▾	Section of the Act	
		Property Rights	Fee Simple ▾	Condo Project	
		Appraised Value	\$ 250,000.00	Assessment ID	
		Purchase Price		Project Waiver Request ID	

– Underwriting screen > Loan Analysis tab > Subject Property and Project Classification section.

Loans ▾	@ P2107221—Patrick P test, Jr ✕ ▾	Production ▾	Underwriting ▾							
Send/Status	Borrower	Property	Product & Pricing	Transactions	Contacts	Summary	USDA	Closing Costs	Loan Transmittal	Underw
Summary   Loan Analysis   Review & Decision										

## ↑ Subject Property and Project Classification

Address	1234 Main	Property Type		Project Name	
Unit Type		Number of Units	1	Fannie Mae	
Unit Number		Occupancy	Primary Residence ▾	Freddie Mac	
City	Baltimore	Sales Price	\$	CPM Project ID	
State	MD ▾ ZIP 20600-1234	Appraised Value	\$ 250,000.00	CPM Certification ID	
County		Property Rights	Fee Simple ▾	CPM Phase ID	
				Section of the Act	
				Condo Project	
				Assessment ID	
				Project Waiver Request ID	

## Production and Compliance

### Closing Costs Screen

#### Closing Disclosure Tab

✓ (51150)

Updated the calculation for *Mortgage Insurance* in the *Projected Payments* section, where the MI amount is rounded up.

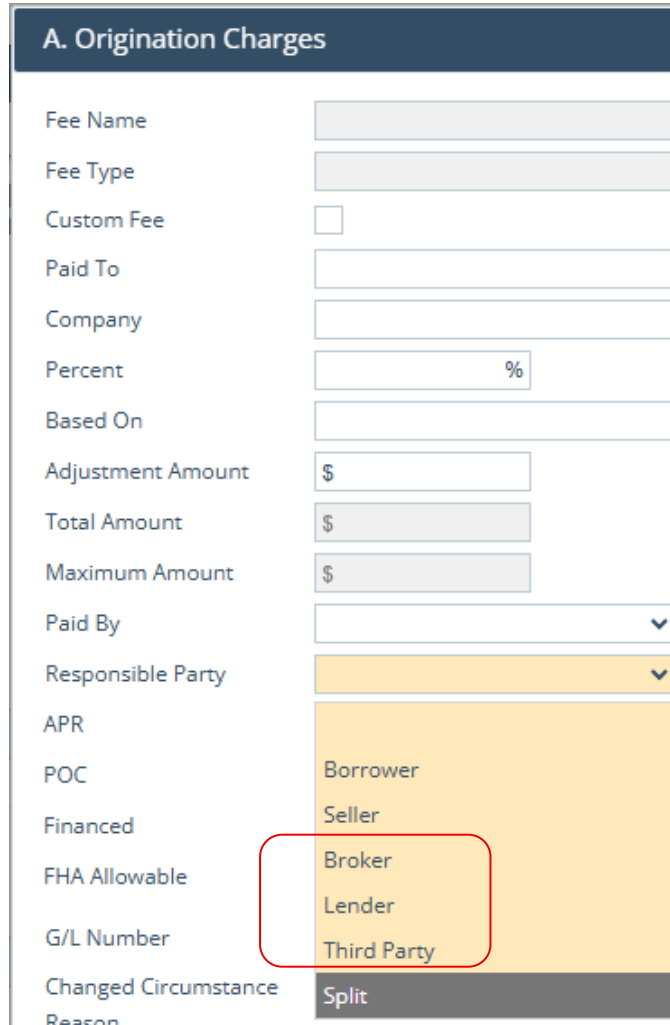
– Example: \$83.125 rounds up to \$83.13.

- This update also applies to the *Payment Schedule* engine.

### Fees and Loan Estimate Tabs

✓ (51445)

Updated the fee lightboxes by adding **Broker**, **Lender**, and **Third Party** to the *Responsible Party* dropdown, on the *Fees* tab.




**A. Origination Charges**

Fee Name	
Fee Type	
Custom Fee	<input type="checkbox"/>
Paid To	
Company	
Percent	<input type="text"/> %
Based On	
Adjustment Amount	\$ <input type="text"/>
Total Amount	\$ <input type="text"/>
Maximum Amount	\$ <input type="text"/>
Paid By	<input type="text"/>
Responsible Party	<input type="text"/>
APR	
POC	Borrower
Financed	Seller
FHA Allowable	Broker
G/L Number	Lender
Changed Circumstance	Third Party
Reason	Split

- This update applies to all fees and sections.
- The *Responsible Party* dropdown now has the same options as the *Paid By* dropdown.
- Updated the logic for *Origination Charges* and *Lender Credits*, on the *Loan Estimate* tab, to exclude non-borrower fees, that is, when the *Responsible Party* is not the *Borrower*.

### ⬆ Closing Costs Details

Origination Charges	\$	0.00	
Services Borrower Cannot Shop For	\$	0.00	
Services Borrower Can Shop For	\$	0.00	
Total Loan Costs (Borrower Responsible)	\$	0.00	
Taxes and Other Government Fees	\$	0.00	
Prepays	\$	0.00	
Initial Escrow Payment at Closing	\$	0.00	
Other	\$	0.00	
Total Other Costs (Borrower Responsible)	\$	0.00	
Total Loan Costs (Borrower Responsible)	\$	0.00	
Total Other Costs (Borrower Responsible)	\$	0.00	
Lender Credits	- \$	0.00	
Total Closing Costs (Borrower Responsible)	\$	0.00	

# Bugfixes

## Reports

### System Fields Causing an Error

🔧 (51551)

- **Issue** – Previously, adding system fields to a report caused an error when the report is run.
- **Fix** – Now, system fields no longer causes an error.

## Loans

### Lock

#### Lock Request Screen

##### Lock Already Placed Lightbox

### Appraised Value Issue

🔧 (51577)

- **Issue** – Previously, the *Appraised Value* displayed an incorrect figure, which was the *Estimated Value*.
- **Fix** – Now, the *Appraised Value* is displaying the correct figure.

### Production

#### Loan Transmittal Screen

### Qualifying Payment Issue

🔧 (51588)

- **Issue** – Previously, the *Qualifying Payment (P&I)* was displaying an inaccurate value.
- **Fix** – Now, updated the calculation for *Qualifying Payment (P&I)* to display the correct value.

## Product & Pricing Screen

### Payment Schedule Lightbox

#### Discrepancies Between Payment Schedule Engine and DocMagic

🔧 (51562)

- **Issue** – Previously, there were discrepancies between Path and DocMagic regarding the *Amount Financed*, *Finance Charges*, and *APR*, when the *Prepaid Interest* was a negative value.
- **Fix** – Now, a negative *Prepaid Interest* no longer causes these discrepancies.

## Closing Information Screen

### Wire & Funding Tab

#### Aggregate Adjustment Issue

🔧 (51578)

- **Issue** – Previously, the *Aggregate Adjustment* was not automatically populating in the *Wire Calculation* section, when it is entered elsewhere in Path.
- **Fix** – Now, the *Aggregate Adjustment* is automatically populated in the *Wire Calculation* section, when it is entered elsewhere in Path.