



path
calyx

RELEASE NOTES

July 2025

Path Release Notes (June 9th Version)

July 2025

This Path release is scheduled for production release on July 20th, 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 .

IMPORTANT: This is a pre-release version of the release notes, not the final version. Not all IFRs are included in this version of the release notes. Future versions will include more IFRs.

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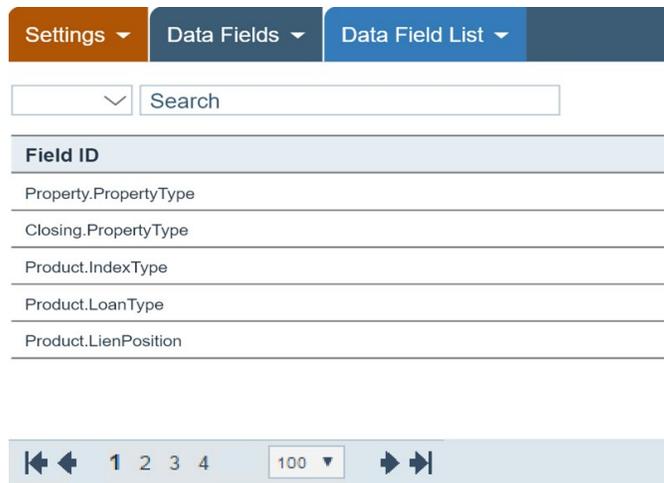
New Features

Settings

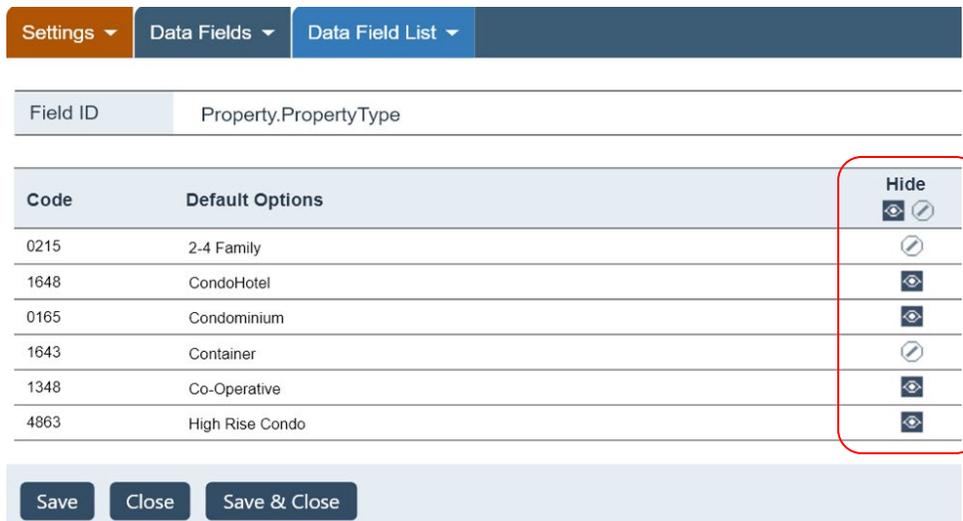
Data Fields Screen (NEW)

- ✓ (45748) – Added the new **Data Fields** screen.

Purpose – To allow you to determine which options are displayed on or hidden from dropdown lists in *Loans*.



- From this screen, select the dropdown list, to configure the displayed or hidden options.



- Once the dropdown list is opened, the default list of options are displayed.

- In the **Hide** column, toggle between the show or hide icons to configure which options are displayed or hidden on the dropdown list.
 - Select  to display.
 - Select  to hide.

Lock

Confirm Screen

Rate Sheet Detail Lightbox

- ✓ (49547) – Added the **Select & Save Price to Benchmark** and **Select & Save Price to Anticipated Sell** buttons to the *Rate Sheet Detail* lightbox.

Rate Sheet Detail
✕

Provider: Newrez Correspondent
Product: 30 Yr Freddie Only Fixed

Price Search Ran On: 05/15/2025 9:38:26 AM

Calculation Detail Lock Period : 30 Day

Rate	30 Day	45 Day	60 Day	75 Day
6.00000 %	<input type="radio"/> 94.8750	<input type="radio"/> 94.8750	<input type="radio"/> 94.7500	<input type="radio"/> 94.6250
6.12500 %	<input type="radio"/> 95.3750	<input type="radio"/> 95.3750	<input type="radio"/> 95.2500	<input type="radio"/> 95.0000
6.25000 %	<input type="radio"/> 96.0000	<input type="radio"/> 95.8750	<input type="radio"/> 95.7500	<input type="radio"/> 95.6250
6.37500 %	<input type="radio"/> 96.6250	<input type="radio"/> 96.6250	<input type="radio"/> 96.3750	<input type="radio"/> 96.2500
6.49000 %	<input type="radio"/> 97.2500	<input type="radio"/> 97.1250	<input type="radio"/> 97.0000	<input type="radio"/> 96.8750
6.50000 %	<input type="radio"/> 97.2500	<input type="radio"/> 97.2500	<input type="radio"/> 97.0000	<input type="radio"/> 96.8750
6.62500 %	<input type="radio"/> 97.6250	<input type="radio"/> 97.6250	<input type="radio"/> 97.3750	<input type="radio"/> 97.2500
6.75000 %	<input type="radio"/> 98.0000	<input type="radio"/> 98.0000	<input type="radio"/> 97.8750	<input type="radio"/> 97.6250
6.87500 %	<input type="radio"/> 98.6250	<input type="radio"/> 98.5000	<input type="radio"/> 98.3750	<input type="radio"/> 98.2500
6.99000 %	<input type="radio"/> 99.1250	<input type="radio"/> 99.1250	<input type="radio"/> 98.8750	<input type="radio"/> 98.7500
7.00000 %	<input type="radio"/> 99.1250	<input type="radio"/> 99.1250	<input type="radio"/> 99.0000	<input type="radio"/> 98.7500
7.12500 %	<input type="radio"/> 99.5000	<input type="radio"/> 99.3750	<input type="radio"/> 99.2500	<input type="radio"/> 99.1250
7.25000 %	<input type="radio"/> 99.8750	<input type="radio"/> 99.7500	<input type="radio"/> 99.6250	<input type="radio"/> 99.3750
7.37500 %	<input checked="" type="radio"/> 100.3750	<input type="radio"/> 100.3750	<input type="radio"/> 100.1250	<input type="radio"/> 100.0000
7.49000 %	<input type="radio"/> 100.8750	<input type="radio"/> 100.8750	<input type="radio"/> 100.6250	<input type="radio"/> 100.5000

Base Rate: 7.37500 %

Rate Adjustments
No adjustments

Adjusted Rate: 7.37500 %

Base Price: 103.5460

Price Adjustments (Not Subject to Price Caps)

Zone 5: AL, FL, MD, NM, TX, VT, ...	0.0200
Margins: Conv 2.75, Gov 4.00, N...	-2.7500

Price Adjustments (Subject to Price Caps)

Second Home	-1.1250
Sub Financing	-0.6250
Loan Amt >\$250,000 - Inv & 2nd ...	0.7500

Adjusted Price: 100.3750

Total Loan Amount \$ 250,400.00

Net Price In Dollars \$ -939.00

Back

Select & Save Price to Benchmark

Select & Save Price to Anticipated Sell

Purpose – To allow you to import pricing to the *Benchmark Price* and *Anticipated Sell Price* sections on the *Lock > Confirm* screen, as shown below.

Benchmark Price

Copy From Benchmark Price 

Total Loan Amount % 

Benchmark Rate % Benchmark Term Benchmark Lock Period

Last Priced Date/Time

Group Group ID

Investor/Provider Investor/Provider ID

Program Program ID

Product Product Code



Benchmark Price + \$ = \$

Anticipated Sell Price

Copy From Anticipated Sell Side Price 

Anticipated Principle Amount Purchased \$

Commitment Rate Commitment Term Commitment Period

Commitment Type

Last Priced Date/Time

Group Group ID

Investor/Provider Investor/Provider ID

Program Program ID

Product Product Code

Base Price + \$ = \$

Price Adjustments Add Adjustment 

Adjusted Price + \$ = \$

Anticipated Gross Gain/Loss Percent Anticipated Gross Gain/Loss \$

Anticipated Net Gain/Loss \$

- These new buttons and importing functions are only displayed for sell-side products.

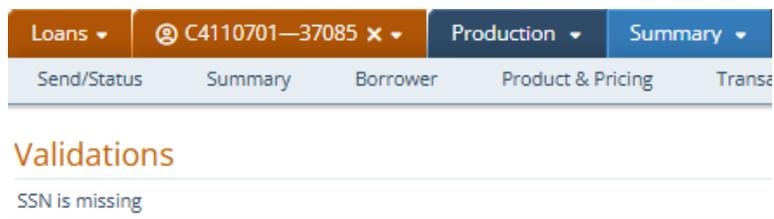
General Update and Enhancements

Loans

Production

Send/Status Screen

- ✓ (50661) – Removed the *Production Validation* section.
 - Purpose** – This section was redundant as it displayed the same information from the *Validations* section on the *Summary* screen.
 - For validations information, see the *Summary* screen.



Borrower Screen

[Assets Section > Other Credits Table > Other Credits Lightbox](#)

- ✓ (50591) – Added **Closing Agent** to the *Source Type* dropdown.
 - Purpose** – To allow you to capture situations where the closing agent contributes funds toward the borrower’s transactions costs

0,000.00	Net	Borrower
		Builder Developer
		Community Non Profit
Other Credits		Closing Agent
Type		Employer
Institution		Federal Agency
Attention		FHLB Affordable Housing Program
Address		Local Agency
Unit Type		Non-Originating Lender
Unit Number		Originating Lender
City		Parent
State		Real Estate Agent
Account Number		Relative
Description		Religious Non Profit
Amount		State Agency
Liquid Asset		Unmarried Partner
Jointly Held With		Unrelated Friend
Source Type		USDA Rural Housing
		Other

Tax Transcript Section > Tax Transcript Lightbox

- ✓ (50513) – Added the **Fiscal Year End Date** field.
 - Purpose** – To allow you to enter the end date of the fiscal year on the 4506-C form, for borrowers that are businesses/legal entities.
 - To enable the new field, make sure to select the *Legal Entity* checkbox.

Tax Transcript

<p>Main</p> <p>Current Information</p> <p><input checked="" type="checkbox"/> Legal Entity</p> <p>First Name <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Last Name/ BMF Company Name <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Tax ID <input type="text"/></p> <p>Title <input type="text"/></p> <p>Phone <input type="text"/></p> <p>Previous Tax Return Information (if different)</p> <p>First Name <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Transcript Information</p> <p>Transcript Request <input type="text"/></p>	<p>Current Address</p> <p>Address <input type="text"/></p> <p>Unit Type <input type="text"/></p> <p>Unit Number <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/> ZIP <input type="text"/></p> <p>Previous Tax Return Address (if different)</p> <p>Address <input type="text"/></p> <p>Unit Type <input type="text"/></p> <p>Unit Number <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/> ZIP <input type="text"/></p> <p>Request Year(s)</p> <p><input type="text"/></p>	<p>Spouse</p> <p>Current Information</p> <p>First Name <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Tax ID <input type="text"/></p> <p>Spouse Previous Tax Return Information (if differen</p> <p>First Name <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Transcript Fees</p> <p>Cost \$ <input type="text"/></p> <p>Fiscal Year End Date <input type="text"/></p>
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Credit Report Data Section > Credit Score Lightbox

- ✓ (50561) – Updated the importing of credit data to also include the 5th credit factor if it exists in the credit report data.

Credit Score
✕

Representative Credit Score: 732	Disclose: Middle or Lower Than Lowest	Provided on Behalf of Lender: <input type="checkbox"/>
Rep Credit Score Agency: Experian	Other Score: <input type="text"/>	Credit Score Impairment: <input type="text"/>
Min FICO: 730	Number of Inquiries (last 120 days): 1	

Credit Agency Name: Xactus		
Address: 600 SAW MILL ROAD		
City: WEST HAVEN	State: CT	ZIP: 06516
Phone: 800-243-0120		

Experian Credit Score: 732 Model Used: Experian Fair Isaac Range: 300 to 850 Percentage: 44.000%	Equifax Credit Score: 734 Model Used: Equifax Beacon 5.0 Range: 300 to 850 Percentage: 48.000%	TransUnion Credit Score: 730 Model Used: FICO Risk Score Classic04 Range: 300 to 850 Percentage: 46.000%
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Factors	Factors	Factors			
Code	Text	Code	Text	Code	Text
<input type="checkbox"/> 18	NUMBER OF ACCOUNTS DELINQUENT.	<input type="checkbox"/> 30	TIME SINCE MOST RECENT ACCOUNT ...	<input type="checkbox"/> 018	NUMBER OF ACCOUNTS WITH DELIN...
<input type="checkbox"/> 10	PROPORTION OF BALANCE TO HIGH ...	<input type="checkbox"/> 18	NUMBER OF ACCOUNTS WITH DELIN...	<input type="checkbox"/> 030	TIME SINCE MOST RECENT ACCOUNT ...
<input type="checkbox"/> 08	NUMBER OF RECENT INQUIRIES.	<input type="checkbox"/> 23	NUMBER OF BANK OR NATIONAL REV...	<input type="checkbox"/> 012	LENGTH OF TIME REVOLVING ACCOU...
<input type="checkbox"/> 05	NUMBER OF ACCOUNTS WITH BALAN...	<input type="checkbox"/> 5	TOO MANY ACCOUNTS WITH BALANC...	<input type="checkbox"/> 010	PROPORTION OF BALANCES TO CRED...
<input type="checkbox"/>	FACTA: Risk Score Value - Score value ...	<input type="checkbox"/>	FACTA: Risk Score Value - Score value ...		

Delete Save

Tables

- ✓ (50737) – Added the delete icon (🗑️) to all applicable tables.
 - Purpose** – To allow you to easily delete items from tables.
 - Same as the *Delete* button, simply select the item’s checkbox and click 🗑️.

Loans ▾ C4110604—Peteraa Parker, Sn ✕ ▾ Production ▾ Borrower ▾

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

Income

Total Income \$ 7,000.00
 Employment Income \$ 6,000.00 Other Income \$ 0.00 Net Rental Income \$ 1,000.00

Employment Income

Status	Start Date	End Date	Company	Self Employed/Owner	Monthly Income Total	Verified Date
<input type="checkbox"/> Current (Primary)			Target	No	\$ 6,000.00	

Subtotal \$ 6,000.00

Other Income

Type	Name	Base Amount	Adjuster	Monthly Income Total	Doc Expiration	Verified Date
No records						

Subtotal \$ 0.00

Assets

Total Assets \$ 671,400.00 Total Liabilities \$ 250,000.00 Net Worth \$ 421,400.00

Bank Accounts, Retirement and Other Accounts

Type	Institution	Account Number	Cash/Balance/Market Value	Source Amount	Verified Date
<input type="checkbox"/> Checking Account	CHASE BANK	231213212	\$ 150,000.00	\$	

Subtotal \$ 150,000.00

Other Assets

Type	Description	Amount	Source Amount
<input type="checkbox"/> Other		\$ 1,400.00	\$

Subtotal \$ 1,400.00

Other Credits

Type	Description	Amount	Source Amount
<input type="checkbox"/> Earnest Money		\$ 20,000.00	\$

Subtotal \$ 20,000.00

Property Screen

Seller Section > Add/Edit Seller Lightbox

- ✓ (50082) – Updated the *Legal Entity*, *Seller First Name*, and *Seller Middle Name* fields to allow for 150, 75, and 50 characters, respectively.

Add Seller

Seller is a Legal Entity/Trust

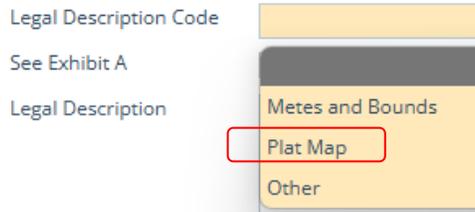
Legal Entity

Seller First Name

Seller Middle Name

Title and Legal Section

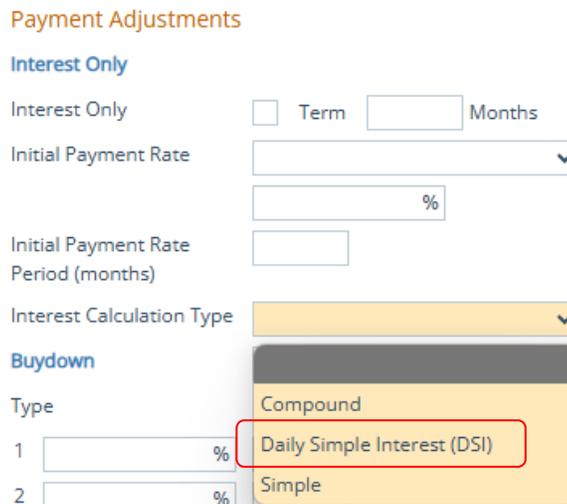
- ✓ (50554) – Updated the *Title Vesting Description* field to allow for 500 characters.
- ✓ (49593) – Added **Plat Map** to the *Legal Description Code* dropdown.



Product & Pricing Screen

Rate Adjustments Section > Payment Adjustments Subsection

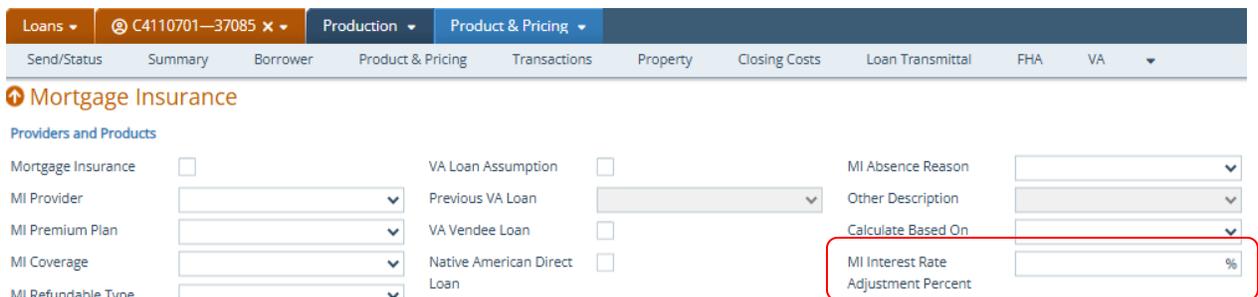
- ✓ (50801, 50254) – Added **Daily Simple Interest (DSI)** to the *Interest Calculation Type* dropdown.
 - Purpose** – To give you a more precise calculation of the interest, based on daily interest. For example, if the borrower chooses to pay early, the interest calculations would be based on how many days have passed since the last payment.



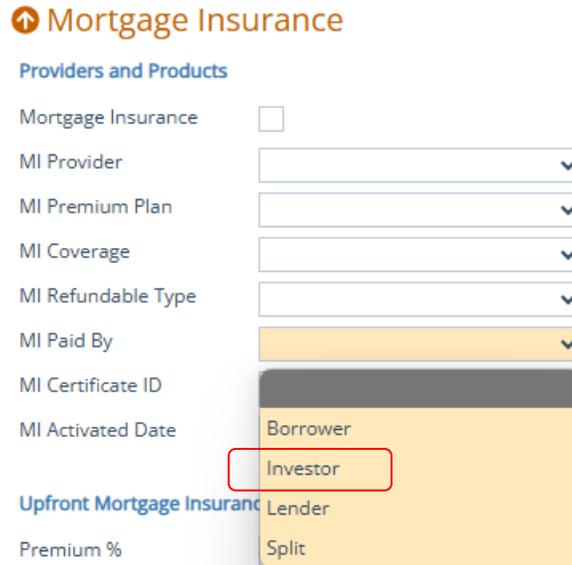
- When *Simple* is chosen, the interest would be paid out in one lump sum at the end of the loan term.

Mortgage Insurance Section

- ✓ (50342) – Added the **MI Interest Rate Adjustment Percent** field.
 - Purpose** – To support specification requirements for ULDD Phase 5.



- ✓ (50598) – Added **Investor** to *MI Paid By* dropdown.
Purpose – To support the changes in ULDD Phase 5.



- ✓ (50884) – Removed the *Premium Paid By* dropdown.
Purpose – Because it was capturing the same data point as the *MI Paid By* dropdown, which could cause confusion.
 - To select who is paying the mortgage insurance premium, select from the *MI Paid By* dropdown.

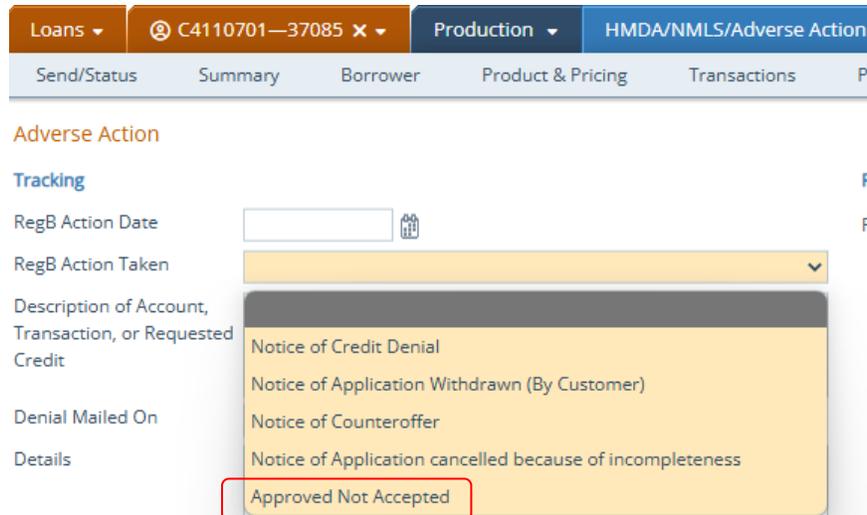
Pricing Group Selection

- ✓ (50549) – Updated the selection of the pricing group.
 - Previously, when the pricing group IDs differ between the ones set up in the user’s profile and the business unit, the selected pricing group ID defaults to one set up in the user’s profile.
 - Now, the selected pricing group ID defaults to the one setup in the business unit. The user can still select other pricing group IDs if needed from the *Pricing Group* dropdown list, which can be found in the following lightboxes:
 - *Product Availability Search*
 - *Eligibility Pricing Search Results*
 - *Historical Pricing Search*

HMDA/NMLS/Adverse Action Screen

Adverse Action Section > Tracking Subsection

- ✓ (50697) – Added **Approved Not Accepted** to the *RegB Action Taken* dropdown.
Purpose – To give you the option to specify that the loan was approved but the borrower decided not to proceed.



Loans ▾ C4110701—37085 ✕ ▾ Production ▾ HMDA/NMLS/Adverse Action

Send/Status Summary Borrower Product & Pricing Transactions P

Adverse Action

Tracking

RegB Action Date 🗓️

RegB Action Taken ▾

Description of Account, Transaction, or Requested Credit

Denial Mailed On

Details

Notice of Credit Denial

Notice of Application Withdrawn (By Customer)

Notice of Counteroffer

Notice of Application cancelled because of incompleteness

Approved Not Accepted

Send/Status Screen

- ✓ (50661) – Removed the *Production Validation* section.
Purpose – This section is no longer needed. For validation information, see *Summary* screen > *Validations* section.

Closing Information Screen > Wire & Funding Tab

- ✓ (46067, 50837, 49278) – Updated the *Wire* tab to the new **Wire & Funding** tab, by incorporating the *Request Funding* screen into the *Wire* tab, resulting in the new **Wire & Funding** tab.
Purpose – To consolidate screens/tabs within tab and to remove the need to move back and forth between different screens and tabs.

Loans ▾ C4110701—37085 X ▾ Production ▾ Closing Information ▾

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

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

Wire Calculation

Deduction		Amount		Addition		Amount	
<input type="checkbox"/>	Certification Fee	\$	0.00	No records			

Total Loan Amount	\$ 324,999.50	Date Requested	<input type="text"/>	Date Approved	<input type="text"/>
Draw Amount	\$ <input type="text"/>	Funds Requested By	<input type="text"/>	Funds Approved By	<input type="text"/>
Total Deductions from Wire	\$ 0.00	Amount Requested	\$ 99,999.50	Amount Approved	\$ 99,999.50
Total Additions to Wire	\$ 0.00				
Net Wire Amount	\$ 324,999.50				

Request Funding

Funding Date: Wire Priority:

Funds Requested By: Phone:

Email:

Comments/Instructions:

Settlement Agent

Settlement Agent		Bank		Further Credit to Bank	
Company	A Title Company	Company	<input type="text"/>	Company	<input type="text"/>
Address	400 Market Street	Address	<input type="text"/>	Address	<input type="text"/>
City	San Jose	City	<input type="text"/>	City	<input type="text"/>
State	CA ZIP 95113	State	<input type="text"/> ZIP <input type="text"/>	State	<input type="text"/> ZIP <input type="text"/>
Country	<input type="text"/>	Country	<input type="text"/>	Country	<input type="text"/>
Phone	(408) 224-3995	Credit To	<input type="text"/>	Further Credit To	<input type="text"/>
Fax	<input type="text"/>	ABA Number	<input type="text"/>	ABA Number	<input type="text"/>
Email	<input type="text"/>	Account Number	<input type="text"/>	Account Number	<input type="text"/>
Contact	Pat Gross	Reference Number	<input type="text"/>		
Escrow Number	<input type="text"/>				

- The *Wire Calculation* section is moved to the top.
- The *Request Funding* screen is no longer available.

Closing Information Screen > General Tab

General Closing Information Section

- ✓ (50242) – Added the **Notary** field and lightbox to replace the **Remote Online Notarization** checkbox. **Purpose** – To allow you to enter more information regarding the notarization, such as the name, company, and the signing location, in addition to remote/online.

Notary
✕

Notary Name

Notary Company

Notary License Number

Signing Location

Remote Online Notarization

Address

Unit Type

Unit Number

City

State Zip

County

Save

- Click the edit icon (📄) next to the **Notary** field, to open the **Notary** lightbox, where you can enter more details about the notarization.
- The *Remote Online Notarization* checkbox has been from the section to the lightbox.

Additional Product Information Section

- ✓ (50321) – Added the **Borrower ACH** checkbox.
- Purpose** – So you don't have to leave the screen and go to the *Product & Pricing* screen to select this checkbox.

Loans ▾
🔍 C4110701—37085 ✕ ▾
Production ▾
Closing Information ▾

Send/Status
Summary
Borrower
Product & Pricing
Transactions

General
Legal
Fees
Insurance & Escrows
Summaries of Trans.
Clo

⬆️ Additional Product Information

Prepayment Penalty <input type="checkbox"/>	Automatic Payment <input type="checkbox"/>
Prepayment Penalty Term <input type="text" value="One Year"/>	Conforming/Non-Conforming <input type="checkbox"/>
Assumable <input type="checkbox"/>	Other Loan Feature <input type="checkbox"/>
Balloon <input type="checkbox"/>	Other Description <input type="checkbox"/>
HELOC <input type="checkbox"/>	Convertible <input type="checkbox"/>
Jumbo <input type="checkbox"/>	Conversion Fee <input type="text" value="\$"/>
Non-Prime <input type="checkbox"/>	Negative Amortization <input type="checkbox"/>
Refundable Finance Charge <input type="checkbox"/>	Relocation Loan <input type="checkbox"/>
Hedge <input type="checkbox"/>	Employee Loan <input type="checkbox"/>
Borrower ACH <input type="checkbox"/>	

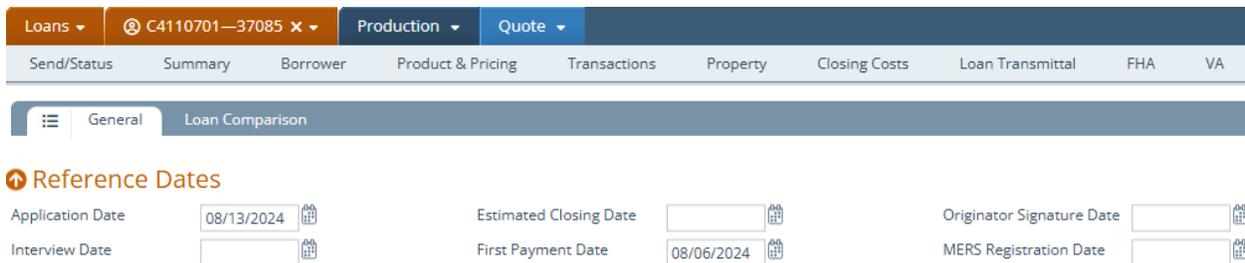
Quote Screen > General Tab

Credit Report Data Section

- ✓ (50749) – Relabeled the *Credit* section to the new **Credit Report Data** section.
Purpose – To be aligned with the corresponding *Credit Report Data* section on the *Borrower* screen.
- ✓ (50572) – Added the **Credit Report Date** and **Credit Report Expires** fields.
Purpose – To be aligned with the corresponding *Credit Report Data* section on the *Borrower* screen.

Reference Dates Section

- ✓ (50751) – Added the **Reference Dates** section.
Purpose – To give you access to these dates without the need to leave the screen. This section can also be found on the *Transactions* screen.



The screenshot shows the 'Reference Dates' section within the 'General' tab of the 'Quote' screen. It includes the following fields:

- Application Date: 08/13/2024
- Estimated Closing Date: [Empty]
- Originator Signature Date: [Empty]
- Interview Date: [Empty]
- First Payment Date: 08/06/2024
- MERS Registration Date: [Empty]

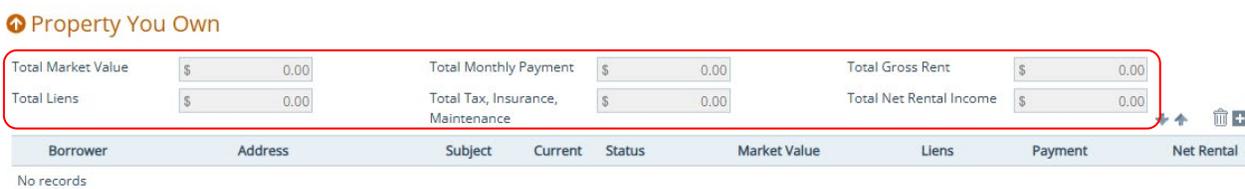
Sections

- ✓ (50750) – Updated the *Assets*, *Property You Own*, and *Liabilities* sections by moving the *Total* fields to the top of each section.



The screenshot shows the 'Assets' and 'Gift Funds' sections. In the 'Assets' section, the 'Total Assets' and 'Total Liquid Assets' fields are highlighted with a red box, both showing \$ 0.00. Below this are two tables:

- Bank Accounts, Retirement and Other Accounts- Other Assets - Other Credits:** A table with columns: Borrower, Type, Institution, Account Number, Cash/Balance/Market Value, Source Amount. It shows 'No records'.
- Gift Funds:** A table with columns: Borrower, Donor, Relationship, Deposited, Cash/Balance/Market Value, Source Amount. It shows 'No records'.



The screenshot shows the 'Property You Own' section. The summary fields are highlighted with a red box:

- Total Market Value: \$ 0.00
- Total Monthly Payment: \$ 0.00
- Total Gross Rent: \$ 0.00
- Total Liens: \$ 0.00
- Total Tax, Insurance, Maintenance: \$ 0.00
- Total Net Rental Income: \$ 0.00

Below this is a table with columns: Borrower, Address, Subject, Current, Status, Market Value, Liens, Payment, Net Rental. It shows 'No records'.



The screenshot shows the 'Liabilities' section. The summary fields are highlighted with a red box:

- Total Liabilities: \$ 0.00
- Total Monthly Payment: \$ 0.00

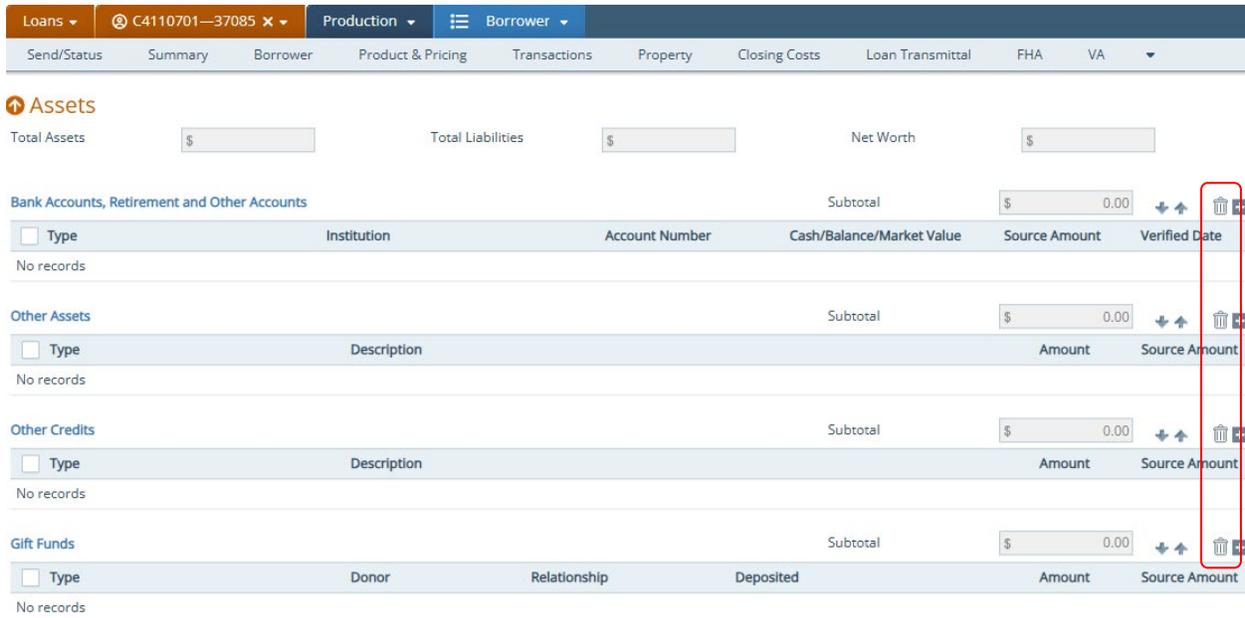
Below this is a table with columns: Borrower, Type, Creditor, Balance, Payment, PAC, Omit. It shows 'No records'.

Tables

- ✓ (50753) – Added the delete icon (🗑️) to all applicable tables.

Purpose – To allow you to easily delete items from tables.

- Same as the *Delete* button, simply select the item’s checkbox and click 🗑️.



The screenshot displays the 'Assets' section of the software. It includes several tables: 'Bank Accounts, Retirement and Other Accounts', 'Other Assets', 'Other Credits', and 'Gift Funds'. Each table has a 'Subtotal' row and a header row with columns like 'Type', 'Institution', 'Description', 'Amount', and 'Source Amount'. A red box highlights the delete icon (🗑️) located in the top right corner of each table's header area.

Lightboxes

- ✓ (50748) – Updated all the buttons in all applicable lightboxes to have uniform buttons, with **Previous**, **Next**, **Save**, **New**, and **Delete**.



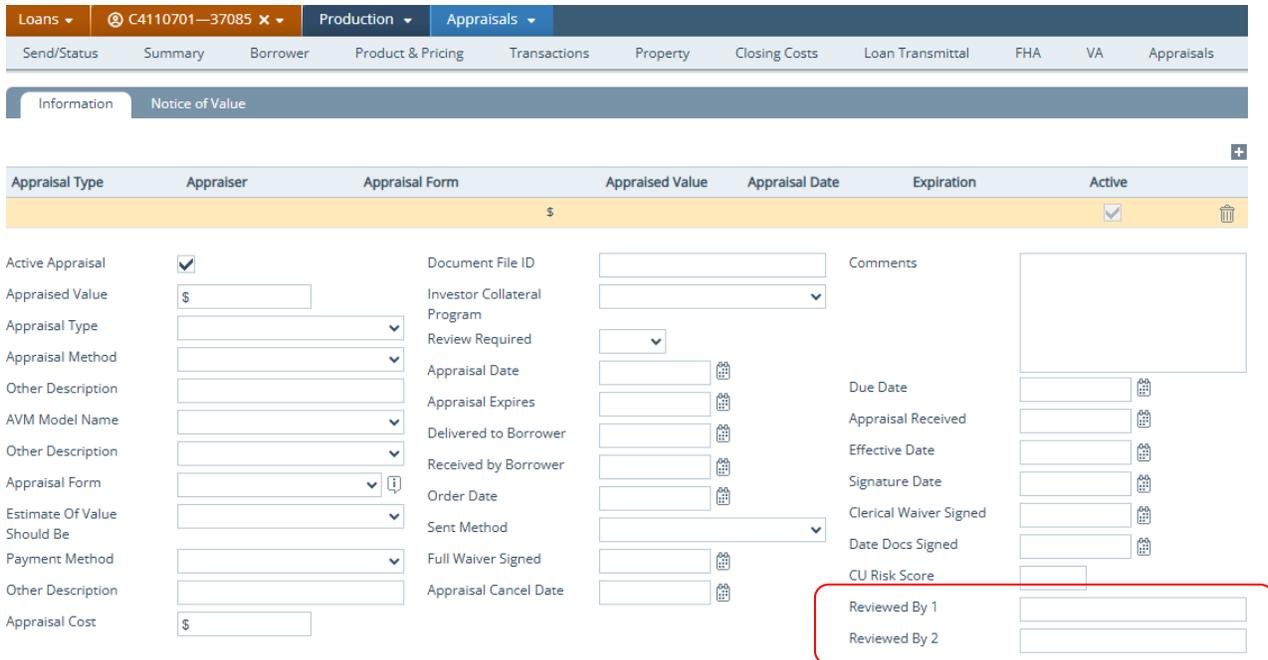
The screenshot shows a lightbox form with the following fields: 'Notes' (text area), 'Request Verification' (checkbox), and 'Verified Date' (text input). At the bottom, there is a row of six uniform buttons: 'Previous', 'Next', 'Save', 'New', 'Delete', and 'Open Verification'.

- This update applies to the following lightboxes:
 - *Income Employment*
 - *Other Income*
 - *Asset*
 - *Property You Own*
 - *Liabilities*

Appraisals Screen > Information Tab

- ✓ (50467) – Added **Reviewed By** fields.

Purpose – To allow you to enter who reviewed the appraisal.



The screenshot shows the 'Appraisals' screen in the 'Information' tab. The breadcrumb trail is 'Loans > C4110701-37085 > Production > Appraisals'. The navigation bar includes 'Send/Status', 'Summary', 'Borrower', 'Product & Pricing', 'Transactions', 'Property', 'Closing Costs', 'Loan Transmittal', 'FHA', 'VA', and 'Appraisals'. The sub-tab is 'Notice of Value'. The main form has a table header with columns: 'Appraisal Type', 'Appraiser', 'Appraisal Form', 'Appraised Value', 'Appraisal Date', 'Expiration', and 'Active'. Below the header, there are several input fields and dropdown menus. A red box highlights the 'Reviewed By 1' and 'Reviewed By 2' fields, which are text input boxes.

- ✓ (50709) – Updated the *CU Risk Score* field to allow for 999 to be entered.

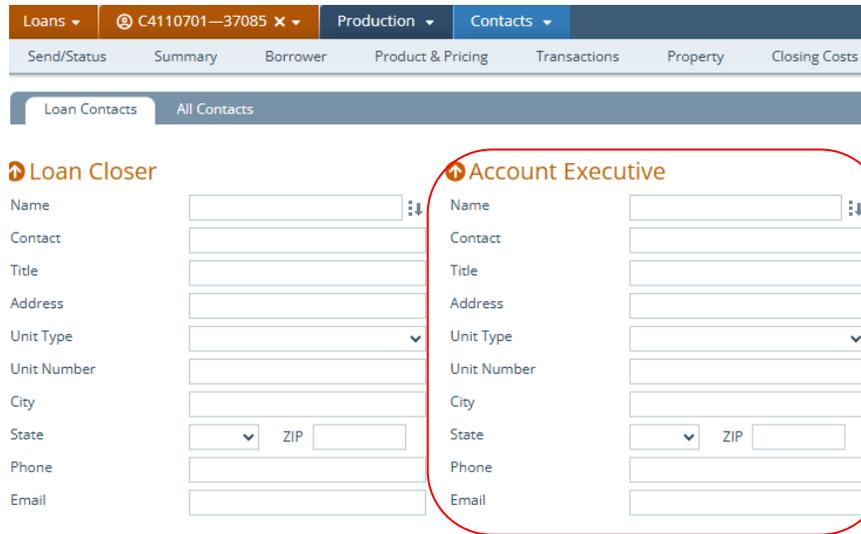
Purpose – Previously, you could only enter a value between 1.0 to 5.0, by increments of 0.5. Now, you can enter 999, to indicate that CU could not generate a score, due to missing date or geocoding issues.

Contacts Screen > Loan Contacts Tab

Account Executive Section (NEW)

- ✓ (49685) – Added the **Account Executive** section.

Purpose – To give you an area to enter this information.



The screenshot shows the Path Calyx interface with a navigation bar at the top containing 'Loans', 'C4110701—37085', 'Production', and 'Contacts'. Below the navigation bar are tabs for 'Send/Status', 'Summary', 'Borrower', 'Product & Pricing', 'Transactions', 'Property', and 'Closing Costs'. The main content area has two tabs: 'Loan Contacts' and 'All Contacts'. Two contact forms are visible: 'Loan Closer' and 'Account Executive'. The 'Account Executive' form is highlighted with a red rounded rectangle. Both forms have fields for Name, Contact, Title, Address, Unit Type, Unit Number, City, State, ZIP, Phone, and Email.

Lock

Summary Screen

- ✓ (49980) – Updated the *Copy from Lock to Loan* button, to be displayed only when the loan is locked. When the loan is not locked, this button is hidden.

Purpose – To prevent blank lock data from being copied to screens in *Loans*.

Purchase Advice Screen

Purchase Advice Detail Section

- ✓ (50560) – Added new fields to the *Escrows* and *Fees* subsections.

Purpose – To give you easier access to these data points:

- **Escrow/Impound Balance**
- **Funding/Delivery Fee**
- **Underwriting Fee**
- **Tax Service Fee**

Escrow Total: \$ 0.00 +
Escrow/Impound Balance \$

Escrow Name	Charge
No records	

Fee Total: \$ 0.00 +
Funding/Delivery Fee \$
Underwriting Fee \$
Tax Service Fee \$

Fee Name	Charge
No records	

Servicer Information Section (NEW)

- ✓ (48607) – Added the **Servicer Information** section.

Purpose – To save you time and the need to leave the screen to enter/modify this information.

Loans ▾ C3031501—DTI ✕ ▾ Lock ▾ Purchase Advice ▾

Send/Status Summary Request Lock Verification Purchase Advice Profit & Loss Confirm

↑ Servicer Information

Servicer

Servicer Name

Servicer Number

Address

Unit Type

Unit Number

City

State ZIP

Country

Phone Number

Toll Free Number

Business Hour To

Future Servicer

Future Servicer

Transfer Date

Address

Unit Type

Unit Number

City

State ZIP

Country

Phone Number

Toll Free Number

Transfer Contact

Phone Number

Business Hour To

Subservicer

Subservicer Name

Subservicer Number

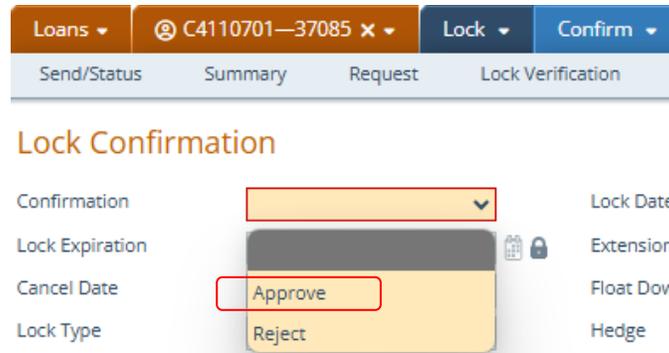
Subservicer Loan Number

- The fields in this section are synced with the correspond fields from the *Closing Information > General* tab.

Confirm Screen

Lock Confirmation Section

- ✓ (50447) – Updated the *Confirmation* dropdown to display the option **Approve** instead of *Confirm*.



Loans C4110701—37085 Lock Confirm

Send/Status Summary Request Lock Verification

Lock Confirmation

Confirmation

Lock Expiration

Cancel Date

Lock Type

Lock Date

Extension

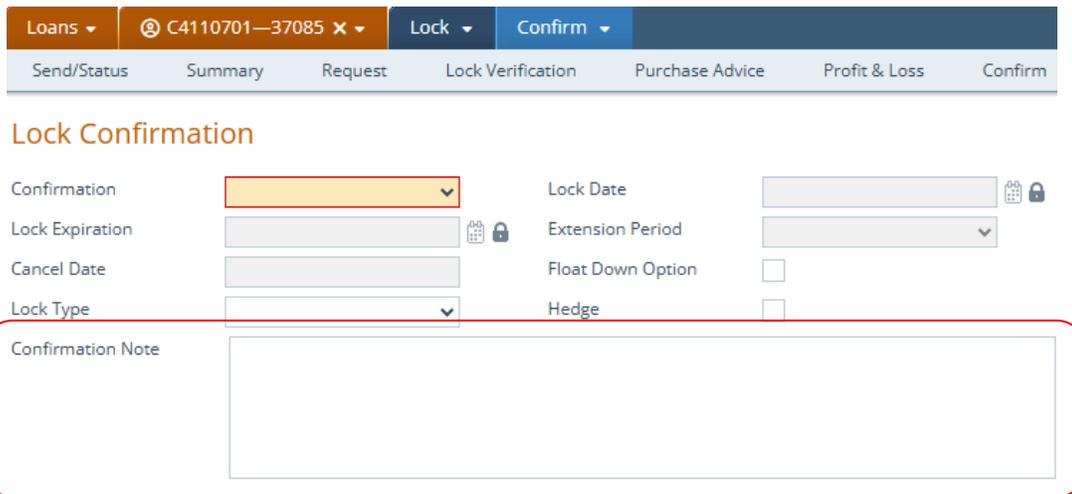
Float Down

Hedge

Approve

Reject

- ✓ (50205) – Updated the *Confirmation Note* field to allow for a maximum of 8000 characters.



Loans C4110701—37085 Lock Confirm

Send/Status Summary Request Lock Verification Purchase Advice Profit & Loss Confirm

Lock Confirmation

Confirmation

Lock Expiration

Cancel Date

Lock Type

Lock Date

Extension Period

Float Down Option

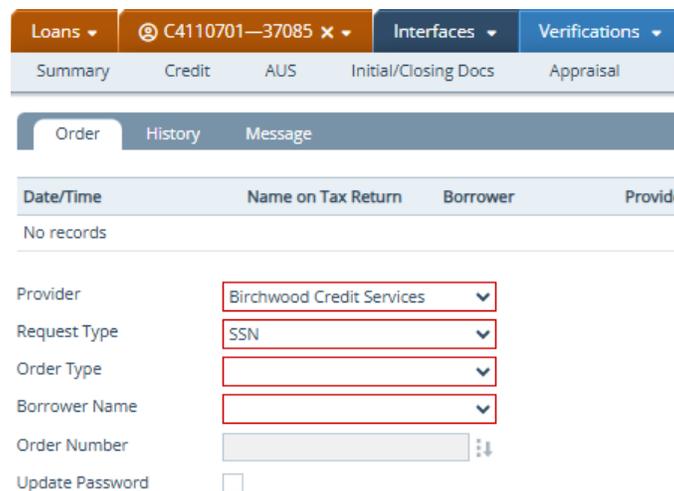
Hedge

Confirmation Note

Interfaces

Verifications Screen > Order Tab

- ✓ (50744) – Added **SSN** to the *Request Type* dropdown for Birchwood Credit Services.



Loans C4110701—37085 Interfaces Verifications

Summary Credit AUS Initial/Closing Docs Appraisal

Order History Message

Date/Time	Name on Tax Return	Borrower	Provide
No records			

Provider

Request Type

Order Type

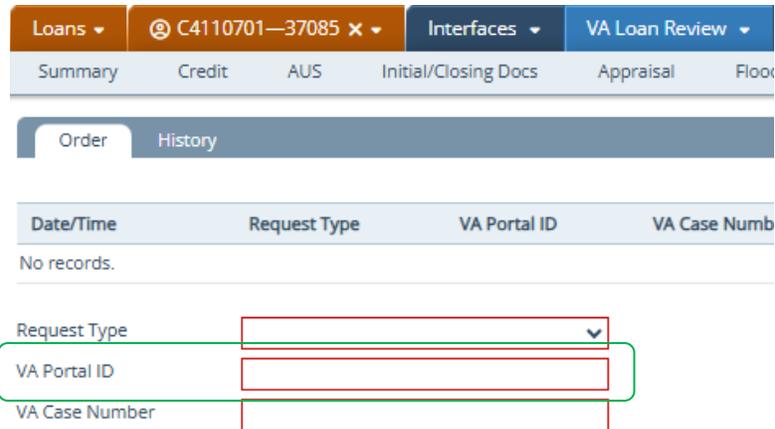
Borrower Name

Order Number

Update Password

VA Loan Review Screen > Order Tab

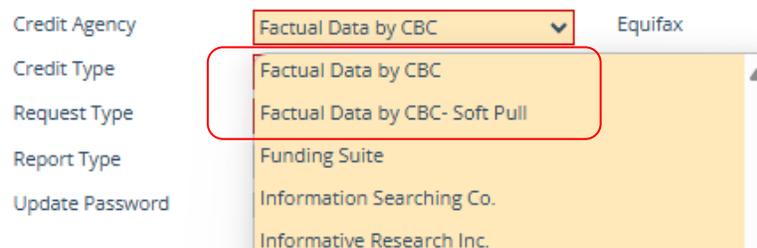
- ✓ (50563) – Relabeled *VA Lender ID* to the new **VA Portal ID**.
Reason – This field was incorrectly labeled as the *VA Lender ID*.



The screenshot shows the VA Loan Review interface. At the top, there are navigation tabs: 'Loans', 'C4110701—37085', 'Interfaces', and 'VA Loan Review'. Below these are sub-tabs: 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', and 'Floor'. The 'Order' tab is selected, and the 'History' tab is also visible. Below the tabs is a table with columns: 'Date/Time', 'Request Type', 'VA Portal ID', and 'VA Case Num'. The table currently shows 'No records.' Below the table are three input fields: 'Request Type' (a dropdown menu), 'VA Portal ID' (a text input field), and 'VA Case Number' (a text input field). The 'Request Type' dropdown is highlighted with a red box, and the 'VA Portal ID' and 'VA Case Number' input fields are highlighted with a green box.

Credit Screen > Order Tab

- ✓ (50328) – The services, *Factual Data by CBC* and *Factual Data by CBC – Soft Pull*, can no longer be paid with credit cards.
Reason – CBC has stopped supporting this functionality.



The screenshot shows a dropdown menu for 'Credit Agency'. The menu is open, showing several options: 'Factual Data by CBC', 'Factual Data by CBC - Soft Pull', 'Funding Suite', 'Information Searching Co.', and 'Informative Research Inc.'. The 'Factual Data by CBC' and 'Factual Data by CBC - Soft Pull' options are highlighted with a red box. The 'Equifax' label is visible to the right of the dropdown menu.

- When either of these services are selected, the *Pay by Credit Card* checkbox is disabled.

Production and Interfaces

Path POS (Zip) Import

- ✓ (50720) – Updated the importing of loans, where the sales price from Path POS (Zip) will be populated in the *Estimated Property Value* field (*Product & Pricing* screen > *Loan Information* section).
 - The sales price from Path POS (Zip) already imports to the *Sales Price* field (*Product & Pricing* screen > *Loan Information* section). Now it also imports to the *Estimated Property Value* field.

Production and Lock

- ✓ (50362) – Updated the data sync between loan and lock data for ARM loans, where the *Index Type Description* is now automatically copied from *Loans* to *Lock*.
 - The *Index Type Description* can be found at *Loans > Product & Pricing > Rate Adjustments* section.
 - The *Index Type Description* is also copied from *Lock* to *Loans* when you click the *Copy from Lock to Loan* button on the *Lock > Summary* screen.

Production and Compliance

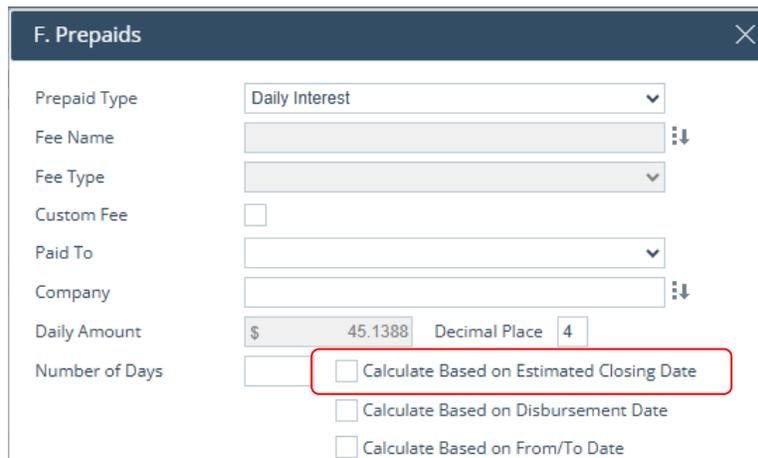
Closing Cost Screen > Fees Tab

F. Prepays Section > F. Prepays Lightbox

- ✓ (50468) – Added the **Calculated Based on Estimated Closing Date** checkbox.

Purpose – To allow you to calculate the prepaid fee based on the estimated closing date.

 - This checkbox is displayed only when *Prepaid Type > Daily Interest*.



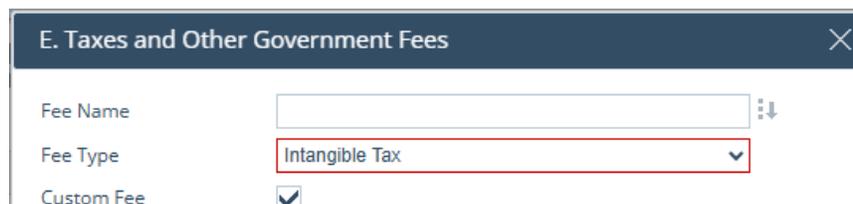
The screenshot shows the 'F. Prepays' lightbox with the following fields and options:

- Prepaid Type: Daily Interest (dropdown)
- Fee Name: (text input)
- Fee Type: (dropdown)
- Custom Fee:
- Paid To: (dropdown)
- Company: (text input)
- Daily Amount: \$ 45.1388 (text input) | Decimal Place: 4 (text input)
- Number of Days: (text input)
- Calculate Based on Estimated Closing Date: (highlighted with a red box)
- Calculate Based on Disbursement Date:
- Calculate Based on From/To Date:

E. Taxes and Other Government Fees Section > E. Taxes and Other Government Fees Lightbox

- ✓ (50738) – Added **Intangible Tax** to the *Fee Type* dropdown.

Purpose – To help you distinguish between the intangible tax and other transfer taxes.



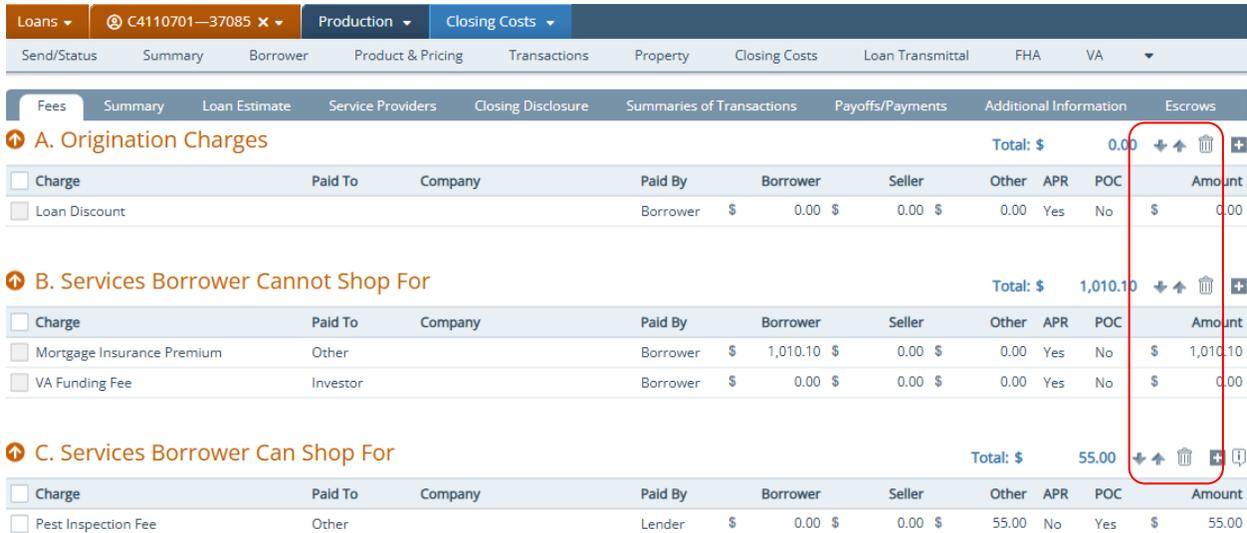
The screenshot shows the 'E. Taxes and Other Government Fees' lightbox with the following fields and options:

- Fee Name: (text input)
- Fee Type: Intangible Tax (dropdown, highlighted with a red box)
- Custom Fee:

Tables

- ✓ (50745) – Added the up/down icons (⬆️/⬇️) and the delete icon (🗑️) to all applicable tables.

Purpose – To allow you to easily move the position(s) of selected item(s), and to delete selected item(s).

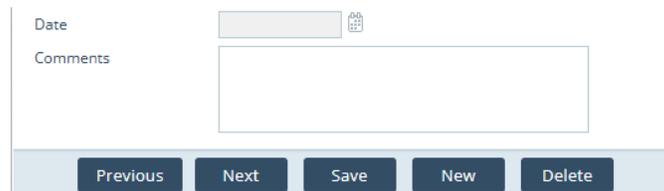


Loans ▾ C4110701--37085 ✕ ▾ Production ▾ Closing Costs ▾										
Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs Loan Transmittal FHA VA ▾										
Fees Summary Loan Estimate Service Providers Closing Disclosure Summaries of Transactions Payoffs/Payments Additional Information Escrows										
A. Origination Charges										Total: \$ 0.00 ⬆️ ⬇️ 🗑️ ↻
<input type="checkbox"/> Charge	Paid To	Company	Paid By	Borrower	Seller	Other	APR	POC	Amount	
<input type="checkbox"/> Loan Discount			Borrower	\$ 0.00	\$ 0.00	\$ 0.00	Yes	No	\$ 0.00	
B. Services Borrower Cannot Shop For										Total: \$ 1,010.10 ⬆️ ⬇️ 🗑️ ↻
<input type="checkbox"/> Charge	Paid To	Company	Paid By	Borrower	Seller	Other	APR	POC	Amount	
<input type="checkbox"/> Mortgage Insurance Premium	Other		Borrower	\$ 1,010.10	\$ 0.00	\$ 0.00	Yes	No	\$ 1,010.10	
<input type="checkbox"/> VA Funding Fee	Investor		Borrower	\$ 0.00	\$ 0.00	\$ 0.00	Yes	No	\$ 0.00	
C. Services Borrower Can Shop For										Total: \$ 55.00 ⬆️ ⬇️ 🗑️ ↻
<input type="checkbox"/> Charge	Paid To	Company	Paid By	Borrower	Seller	Other	APR	POC	Amount	
<input type="checkbox"/> Pest Inspection Fee	Other		Lender	\$ 0.00	\$ 0.00	\$ 55.00	No	Yes	\$ 55.00	

- To move an item, select its checkbox and click ⬆️ or ⬇️.
- To delete an item, select its checkbox and click 🗑️.

Lightboxes

- ✓ (50746) – Updated all the buttons in all applicable lightboxes to have uniform buttons, with **Previous**, **Next**, **Save**, **New**, and **Delete**.



Date

Comments

Previous Next Save New Delete

Closing Costs Screen > Closing Disclosure Tab

Revised Closing Disclosure and Loan Terms Sections

- ✓ (50780) – Updated the *Reason*, *Notes*, and *Prepayment Penalty Description* fields, by expanding the height and width of these fields.

Loans ▾ C4110701—37085 ✕ ▾ Production ▾ Closing Costs ▾

Send/Status Summary Borrower Product & Pricing Transactions Property Closing Costs

Fees Summary Loan Estimate Service Providers Closing Disclosure Summaries of Transactions

⬆ Revised Closing Disclosure

Date

Reason

Notes

⬆ Loan Terms

Purpose Product Name

Loan Amount	\$ 324,999.50	Can Increase?	No	As High As
Interest Rate	5.000 %	Can Increase?	No	As High As
Loan Term	30 years	Adjusts Every		Starting In
Monthly Principal & Interest	\$ 1,744.67	Can Increase?	No	As High As
		Adjusts Every		Starting In
Interest Only	No	Interest-Only Term (months)	0	
Balloon Payment	No	Balloon Term (months)		Max Amount

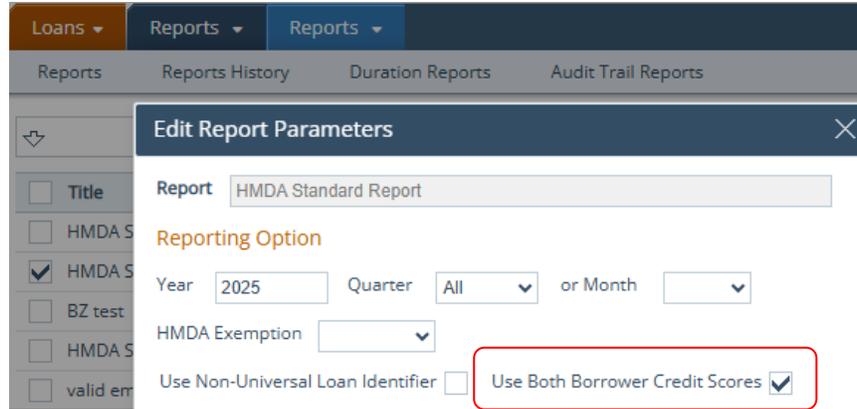
Prepayment Penalty Prepayment Term (months)

Prepayment Penalty Description

Reports

Reports Screen > Edit Report Parameters Lightbox

- ✓ (50171) – Added the **Use Both Borrower Credit Scores** checkbox.
Purpose – This is for when the credit scores of both borrowers need to be reported for HMDA reporting.

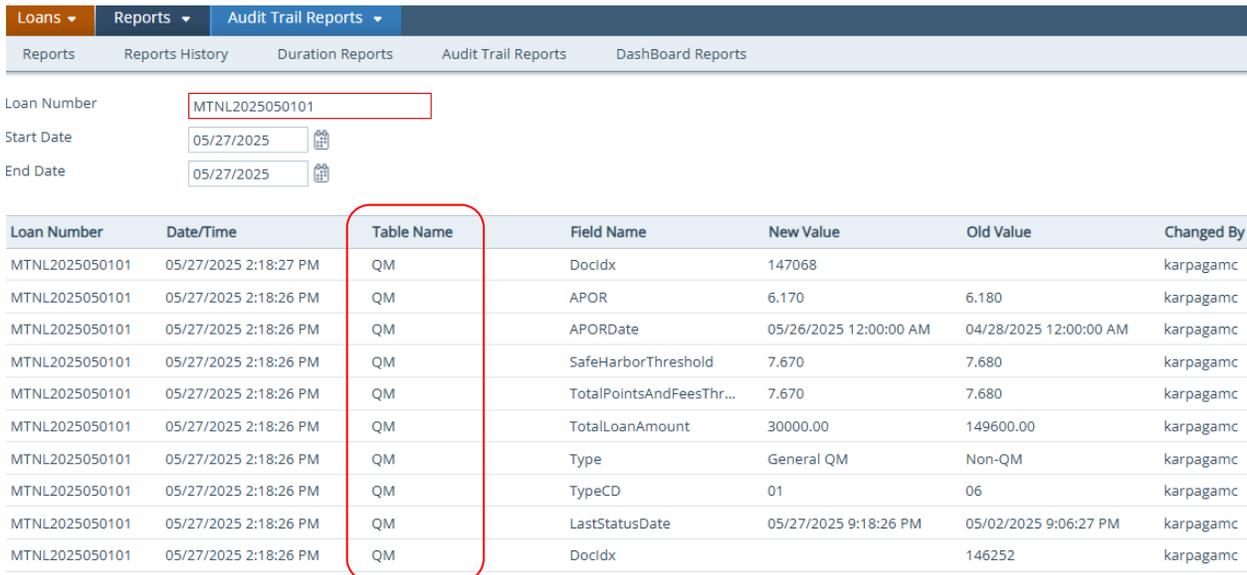


Related: To add HMDA reports for reporting, the system admin need to add them in *Configuration > Roles > Reports > Add button > Report* lightbox.

Audit Trail Reports Screen

- ✓ (50292) – Added **QM** to the *Table Name* column.

Purpose – To allow you to track the changes made to QM fields, the field’s name, new value, old value, and who made the changes.



Loan Number	Date/Time	Table Name	Field Name	New Value	Old Value	Changed By
MTNL2025050101	05/27/2025 2:18:27 PM	QM	DocIdx	147068		karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	APOR	6.170	6.180	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	APORDate	05/26/2025 12:00:00 AM	04/28/2025 12:00:00 AM	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	SafeHarborThreshold	7.670	7.680	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	TotalPointsAndFeesThr...	7.670	7.680	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	TotalLoanAmount	30000.00	149600.00	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	Type	General QM	Non-QM	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	TypeCD	01	06	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	LastStatusDate	05/27/2025 9:18:26 PM	05/02/2025 9:06:27 PM	karpagamc
MTNL2025050101	05/27/2025 2:18:26 PM	QM	DocIdx		146252	karpagamc

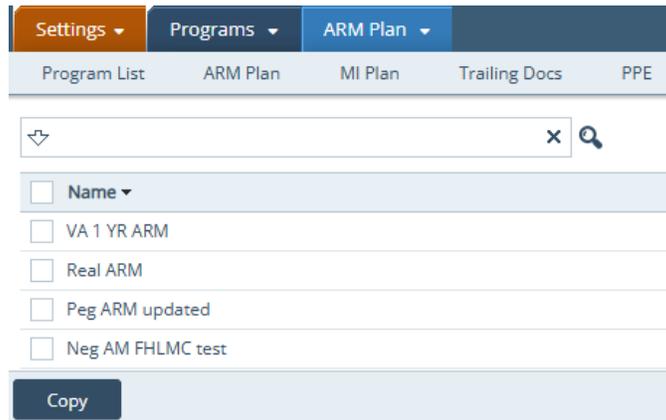
Settings

Programs

ARM Plan Screen

- ✓ (46357) – Added the **Copy** button.

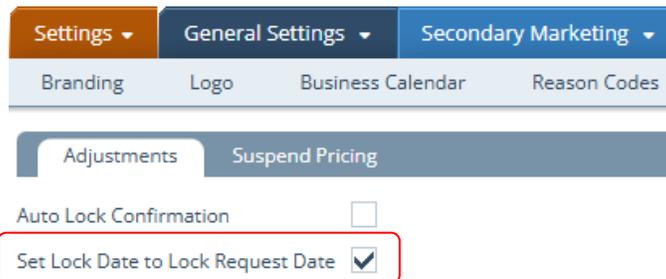
Purpose – To allow you to copy an ARM program and then modify it to your specifications.



General Settings

Secondary Marketing Screen > Adjustments Tab

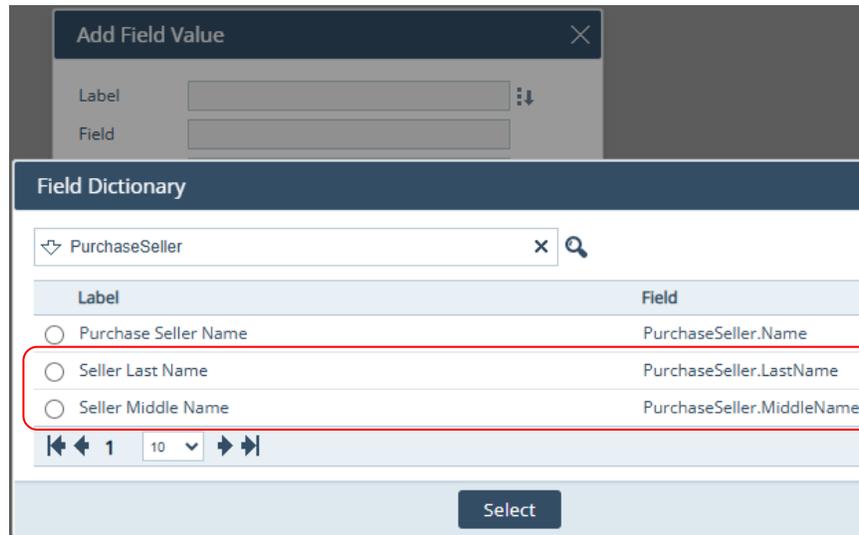
- ✓ (50306) – Updated the *Lock Request Date* checkbox to the new **Set Lock Date to Lock Request Date**.



- Select this checkbox to set the lock request date as the lock date by default, for loan files in *Loans*.
- When this box is unchecked, the default lock date is set to the lock confirm date.

Templates

- ✓ (50900) – Added **PurchaseSeller.LastName** and **PurchaseSeller.MiddleName**.



Dashboards

- ✓ (49245) – Added the following fields, available to be displayed in dashboards.

- **GovtMonitoring.APOR**
- **GovtMonitoring.APORDate**
- **GovtMonitoring.APR**
- **GovtMonitoring.BusinessOrCommercialPurpose**
- **GovtMonitoring.CensusTract**
- **GovtMonitoring.ConstructionMethod**
- **GovtMonitoring.CountyCode**
- **GovtMonitoring.DiscountPoints**
- **GovtMonitoring.DocType**
- **GovtMonitoring.ExcludeLoanFromHMDARReport**
- **GovtMonitoring.FAS140SafeTreatment**
- **GovtMonitoring.HMDAIncome**
- **GovtMonitoring.HMDALienStatus**
- **GovtMonitoring.HMDAPropertyType**
- **GovtMonitoring.HMDARateSpread**
- **GovtMonitoring.HomeImprovementLoan**
- **GovtMonitoring.InitiallyPayableToInstitution**
- **GovtMonitoring.IntroductoryRatePeriod**
- **GovtMonitoring.LegalEntityID**
- **GovtMonitoring.LenderCredits**
- **GovtMonitoring.LoanAppID**
- **GovtMonitoring.LoanPurpose**
- **GovtMonitoring.LoanType**
- **GovtMonitoring.ManufacturedHomeLandInterest**
- **GovtMonitoring.ManufacturedHomeSecuredType**
- **GovtMonitoring.MSAMDCCode**

- **GovtMonitoring.MultiFamilyAffordableUnits**
 - **GovtMonitoring.NegativeAmortizationProgramType**
 - **GovtMonitoring.OpenEndLOCIndicator**
 - **GovtMonitoring.OptionARM**
 - **GovtMonitoring.OriginationCharges**
 - **GovtMonitoring.OtherNonAmortizingFeatureIndicator**
 - **GovtMonitoring.OwnerOccupied**
 - **GovtMonitoring.PointsFeesIndicator**
 - **GovtMonitoring.Preapproval**
 - **GovtMonitoring.RateSpread**
 - **GovtMonitoring.ReverseIndicator**
 - **GovtMonitoring.SameAsClosingCosts**
 - **GovtMonitoring.SameAsLoanIndicator**
 - **GovtMonitoring.StateCode**
 - **GovtMonitoring.SubmissionOfApplication**
 - **GovtMonitoring.TotalLoanCosts**
 - **GovtMonitoring.TransferType**
 - **GovtMonitoring.TypeofPurchaser**
 - **GovtMonitoring.ULICheckDigit**
 - **GovtMonitoring.ULIResult**
 - **GovtMonitoring.ULISameAs**
 - **InvestorPurchaseAdjustment.Type**
 - **InvestorPurchaseAdjustmentTotal.EscrowAmountTotal**
 - **InvestorPurchaseAdjustmentTotal.FeeAmountTotal**
 - **InvestorPurchaseAdjustmentTotal.FinalPurchaseAmount**
 - **InvestorPurchaseAdjustment.Amount**
 - **InvestorPurchaseAdjustment[1].Description**
 - **InvestorPurchaseAdjustment[2].Description**
 - **InvestorPurchaseAdjustment[3].Description**
- ✓ (50575) – Added the following fields, available to be displayed in dashboards.
- **Loan.ActualDiscountRebate**
 - **Loan.BaseLoanAmount**
 - **HMDA.IntentReceivedMethod**
- ✓ (50630) – Added the following fields, available to be displayed in dashboards.
- **HELOC.InitialAdvanceAmount**
 - **Processor.FullName**
 - **Payment.InitialPAILT**
- ✓ (50534) – Added the following field, available to be displayed in dashboards.
- **Property.RefinanceAmountExistingLiens**
- ✓ (50700) – Added the following field, available to be displayed in dashboards.
- **AnticipatedCommitment.AnticipatedSellSideBasePrice**

Configuration

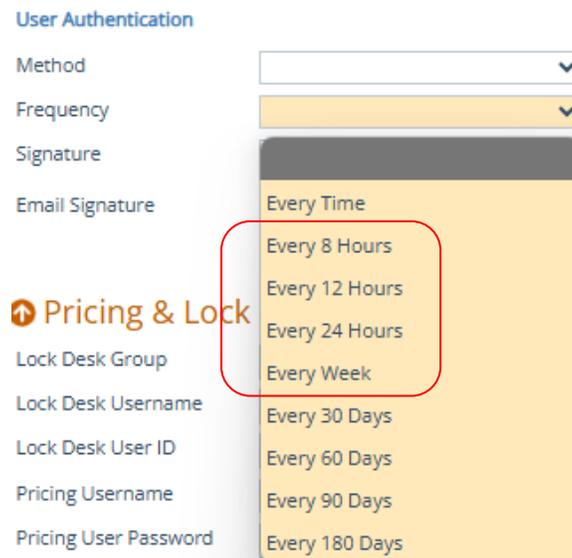
Users

User Authentication

✓ (46604) – Updated the frequency for 2-factor authentication, by adding the following options:

- **Every 8 Hours**
- **Every 12 Hours**
- **Every 24 Hours**
- **Every Week**

Purpose – To help make you organization more secure from phishing attacks.



Bugfixes

Loans

Production

HMDA/NMLS/Adverse Action Screen

Loan Information Section

HMDA Income Rounding Incorrectly

 (50693)

Issue – Previously, the HMDA Income (rounded) field was not rounding up correctly. For example, if the value was 35,500, it would round down to 35. It would only round up if 35,501 was the value.

Fix – Now, it is correctly rounding up to 36 when 35,500 is the value.

Note: The income value populated in this field is based on the monthly income times 12, which is entered on the *Borrower* screen > *Income* section.

Property Screen

Seller Section > Add/Edit Seller Lightbox

Missing Seller Name When Seller Is Legal Entity/Trust

 (50567)

Issue – Previously, when the *Seller is Legal Entity/Trust* box was checked (in the *Add/Edit Seller* lightbox), the name entered in the *Legal Entity* field was not being displayed in the *Seller Name* column (in the *Seller* section).

Fix – Now, when the *Seller is a Legal Entity/Trust* box is checked, the name entered in the *Legal Entity* field is correctly displayed in the *Seller Name* column.

Interfaces

Initial/Closing Docs Screen > Order Tab

Password Issue

 (49441)

Issue – Previously, the special character “&” was causing login issues with DocMagic.

Fix – Now, “&” can be used in passwords without issues.

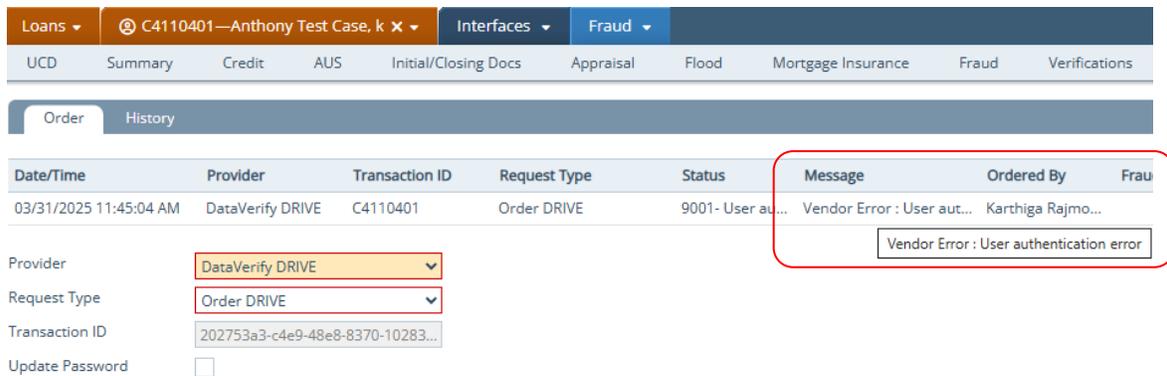
Fraud Screen > Order Tab

Message Display Issue

 (50394)

Issue – Previously, users could not see the full text of the messages displayed under the *Message* column.

Fix – Now, they are displayed in full when you hover the cursor over the message.



Date/Time	Provider	Transaction ID	Request Type	Status	Message	Ordered By	Frau
03/31/2025 11:45:04 AM	DataVerify DRIVE	C4110401	Order DRIVE	9001- User au...	Vendor Error : User authentication error	Karthiga Rajmo...	

Provider: DataVerify DRIVE
 Request Type: Order DRIVE
 Transaction ID: 202753a3-c4e9-48e8-8370-10283...
 Update Password:

Path POS (Zip)

Property Type Import Issue

 (50411)

Issue – Previously, the property types, single-family home and townhome, did not import correctly into Path.

Fix – Now these property types are correctly importing into Path from Path POS (Zip).

Production and Interfaces

XML Import

Alternate Names

 (50859)

Issue – Previously, when importing loans where borrowers have alternate names, the alternate name was not being correctly imported into Path on the *Borrower* screen.

Fix – Now, alternate names are correctly imported.

Production and Settings

Custom Fields

Dropdown Selection Issue

 (49433)

Issue – Previously, when there are special characters, such as plus/minus symbols (+/-), listed in a custom dropdown list, your selection will not be saved when you exit and return to the custom screen.

Fix – Now, your selection is saved correctly when you return to the custom screen.

Compliance

Tolerance Screen

Tax Stamp Categorization Issue

 (50847)

Issue – Previously, the following tax stamps were incorrectly being added to *E. Taxes and Other Government Fees*

- State deed/mortgage
- City deed/mortgage
- County deed/mortgage
- State tax/stamps
- City/County tax/stamps

Fix – Now, these tax stamps are correctly being added to *E. Transfer Taxes*.

Loans		C4110701—37085		Compliance		Tolerance			
Send/Status	Summary	Closing Costs	Other Disclosures	Disclosure Dates	Tolerance	QM	COC Request	COC Confirm	
LE Disclosed Status	<input type="text"/>								
CD Disclosed Status	<input type="text" value="CD Disclosed"/> <input type="checkbox"/>								
Fee Tolerance									
Zero Tolerance	LE Disclosed	CD Disclosed	Current	Difference	Cost to Cure				
A. Origination Charges	\$	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00				
B. Services Borrower Cannot and Did Not Shop For	\$	\$ 1,010.10	\$ 1,010.10	\$ 0.00	\$ 0.00				
E. Transfer Taxes	\$	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00				
Other Fees Paid To Affiliates	\$	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00				
Subtotal	\$ 0.00	\$ 1,010.10	\$ 1,010.10	\$ 0.00	\$ 0.00				
10% Cumulative Tolerance	LE Disclosed	CD Disclosed	Current	Difference	Cost to Cure	Change %	Tolerance		
C. Services Borrower Can but Did Not Shop For	\$	\$ 0.00	\$ 0.00	\$ 0.00	\$				
E. Taxes and Other Government Fees	\$	\$ 0.00	\$ 0.00	\$ 0.00	\$				
Subtotal	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$	0.00		

Lock

Request, Confirm, and Summary Screens

Missing ARM Rounding Factor



(50790)

Issue – Previously, the ARM rounding factor (field label: *Rounding Factor*) was not being copied when lock data was copied to loan data (*Copy from Lock to Loan* button on the *Lock > Summary* screen) and when loan data was copied to lock data (*Copy from Loan to Lock* button on the *Lock > Request* and *Confirm* screens).

Fix – Now, the ARM rounding factor is copied from *Loans* to *Lock* and vice versa. It will also be displayed in the *Loan/Lock Discrepancies* section of the *Lock > Summary* screen when there is a discrepancy.

Missing Property Attachment Type



(50799)

Issue – Previously, the *Property Attachment Type* was not being copied when lock data was copied to loan data (*Copy from Lock to Loan* button on the *Lock > Summary* screen) and when loan data was copied to lock data (*Copy from Loan to Lock* button on the *Lock > Request* and *Confirm* screens).

Fix – Now, the *Property Attachment Type* is copied from *Loans* to *Lock* and vice versa. It will also be displayed in the *Loan/Lock Discrepancies* section of the *Lock > Summary* screen when there is a discrepancy.

Missing Borrower ACH



(50626)

Issue – Previously, the *Borrower ACH* was not being copied when lock data was copied to loan data (*Copy from Lock to Loan* button on the *Lock > Summary* screen) and when loan data was copied to lock data (*Copy from Loan to Lock* button on the *Lock > Request* and *Confirm* screens).

Fix – Now, the *Borrower ACH* is copied from *Loans* to *Lock* and vice versa. It will also be displayed in the *Loan/Lock Discrepancies* section of the *Lock > Summary* screen when there is a discrepancy.

Request and Confirm Screens

Pricing Parameter Update Issue

 (50396)

Issue – Previously, pricing parameter data was not being updated in *Lock* after it was changed in *Loans*.

Fix – Now, pricing parameter data is updated correctly.