


Path Service Pack 3 Release Notes

June 2026

This Path release is scheduled for production release on June 7th, 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 .

Updates

Configuration

Roles > Pipelines > Views

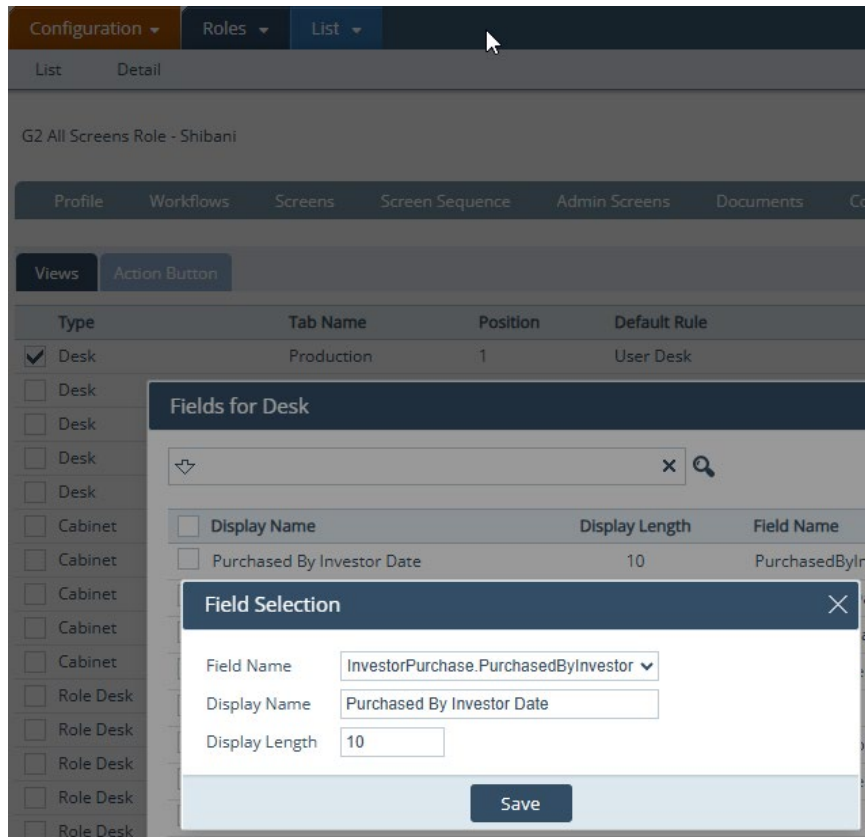
Fields for Desk > Field Selection Lightbox

[New Pipeline Fields \(51954\)](#)

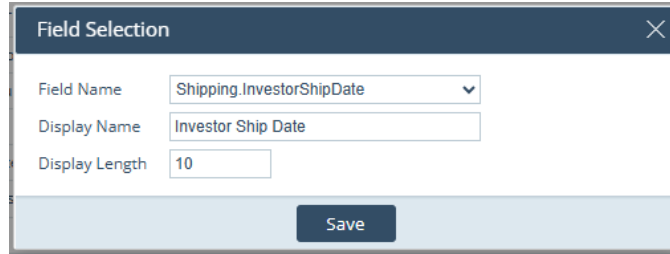
What's Added

✓ Added the following fields that can be displayed as columns in the *Pipeline*:

- **InvestorPurchase.PurchasedByInvestor**
 - Label: **Purchased By Investor Date**



- **Shipping.InvestorShipDate**
 - Label: **Investor Ship Date**



The 'Field Selection' dialog box contains the following fields:

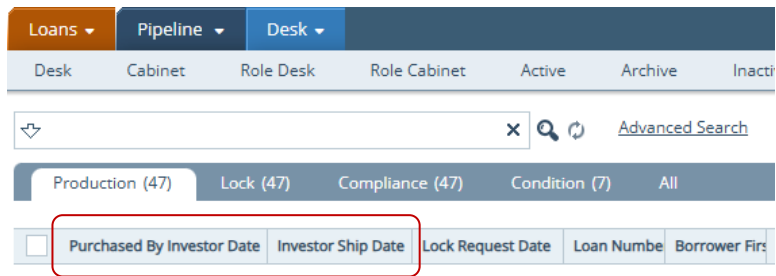
- Field Name: Shipping.InvestorShipDate
- Display Name: Investor Ship Date
- Display Length: 10
- Save button

Note

- Administrators can edit the label and character length of these fields in the *Display Name* and *Display Length* fields, respectively.

Display in Loans > Pipeline

- Once they are added, these fields will be displayed as column headers.



Settings

New Path Field for Custom Screens (52001)

What's Added

- ✓ Added **Property.ParcelNumber** (label: **Parcel Number**) as a Path field that can be added to *Custom Screens*.

Settings ▾ Custom ▾ Custom Screens ▾

Custom Fields Custom Screens Detail

User-Defined Fields

⌵ All

Label	Data Type
<input type="checkbox"/> # of Parcels	Dropdown
<input type="checkbox"/> abs	Text
<input type="checkbox"/> abtest 3	Date
<input type="checkbox"/> Account Executive	Dropdown
<input type="checkbox"/> Adding Field	Currency
<input type="checkbox"/> Adding Field 2	Percent
<input type="checkbox"/> Additional Comments	Text
<input type="checkbox"/> Additional Notes	Text

Path Fields

⌵ All parcel

Label	Fields
Parcel Number	Property.ParcelNumber

Screen Name

Selected Fields

Fields in Order

- Application Created Date
- Loan Originator Section
- Custom Field - List
- Custom Field - Date
- Custom Field - Dropdown List
- Custom Field - Percent
- Estimated Closing Date
- FHA Case #
- Borrower FullName
- Mailing Street Address
- Mailing City
- Mailing State
- Mailing Zip
- YearsAtAddress of MailingAddress
- Property Street Address

Loans

Interfaces

AUS > DualAUS Tab

New Dual AUS Credentials Lightbox (52038)

What's New

- ✓ Added the new **Dual AUS Credentials** lightbox, which opens when the *Order* button is clicked.

Dual AUS Credentials
✕

Desktop Underwriter (DU)

Username

Password

Lender ID

Agency

User ID

Password

Save Password

Loan Product Advisor (LPA)

Seller Servicer Number

Third Party Originator (TPO) Number

Username

Password

Save Password

Save

Purpose

- To allow each user to enter/maintain their own DU credential (instead of storing credentials in the *Business Unit* configuration) by prompting for DU and LPA login credentials at the time of ordering when needed.

Admin Note/Usage

- To control the behavior of this lightbox, the administrator can select or deselect *Disable Login* checkbox for *Desktop Underwriter M3.4* and *Loan Product Advisor (ULAD)* in *Configuration > Business Units > Interfaces > Add/Edit Vendor* lightbox.
 - *Vendor = Desktop Underwriter M3.4*

Add Vendor
✕

Category

Vendor

Disable Login Override Company Setting

Lender ID

Submission Request ⌵ ⌴ 🗑

Username

Password

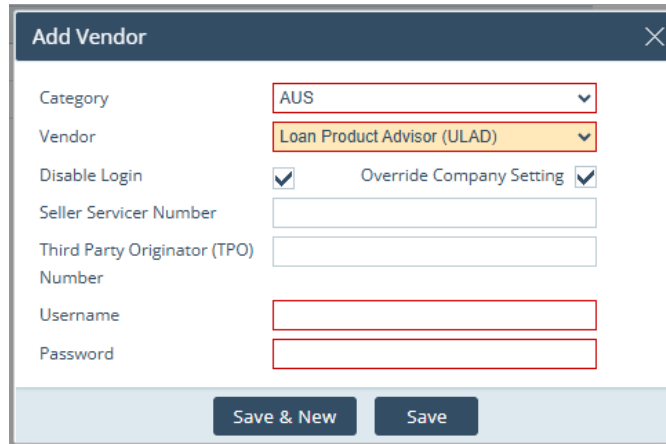
Agency

User ID

Password

Save & New
Save

- Vendor = Loan Product Advisor (ULAD)



When the Dual AUS Credentials Lightbox Appears

- The **Dual AUS Credentials** lightbox is displayed based on the *Disable Login* configuration for each AUS vendor, Desktop Underwriter (DU) and Loan Product Advisor (LPA):
 - If *Disable Login* is selected for both DU and LPA, the lightbox does not appear.
 - Credentials are pulled from BU settings and submission proceeds automatically.
 - If *Disable Login* is selected for DU but not for LPA, the lightbox appears.
 - Users must enter LPA credentials only; DU credentials are read-only and prefilled.
 - If *Disable Login* is not selected for DU but is selected for LPA, the lightbox appears.
 - Users must enter DU credentials only; LPA credentials are read-only and prefilled.
 - If *Disable Login* is not selected for both DU and LPA, the lightbox appears.
 - Users must enter credentials for both DU and LPA.

Table Breakdown

DU Disable Login	LPA Disable Login	Lightbox Appears?	User Action Required	Field Behavior
Yes	Yes	No	None	Both DU and LPA credentials use BU settings (auto-filled)
Yes	No	Yes	Enter LPA credentials only	DU = Read-only, LPA = Editable
No	Yes	Yes	Enter DU credentials only	DU = Editable, LPA = Read-only
No	No	Yes	Enter both DU and LPA credentials	Both = Editable and required

New Dropdown Options (52014)

What's Updated

- ✓ Updated the following dropdown menus with more selectable options:
 - *Technical Affiliate*
 - *Service Provider*

Scope

- The following options are added to the *Technical Affiliate* dropdown menu:
 - When *Meridian Link* is the *Credit Company*:
 - **Advantage Credit Inc by Credit Interlink**
 - **Birchwood Credit Services, Inc.**
 - **CIS by Xactus**
 - **Credit Plus by Xactus**
 - **Partners Credit & Verification**
 - **SettlementOne credit Corp. via MeridianLink**
 - **Unisource Credit LLC**
 - **United One**
 - **Universal Credit by Xactus**
 - **Xactus**
 - **Credit Reporting Services**
 - **DataFacts Lending Solutions by Xactus via ML (304)**
 - **Merchants Credit Bureau (SAV)**
 - **Professional Credit Services**
 - **Xactus via ML**
 - When *SharperLending* is the *Credit Company*:
 - **MFI Credit Solutions**
 - **SARMA**
 - **---Freddie Mac Only---**
 - **Sunrise Credit Services**
 - **Xactus**
 - **Xactus by SL**
- The following options are added to the *Service Providers* dropdown:
 - **Avantus**
 - **Experian**

Appraisal Screen

New Appraisal Method Dropdown (51941)

What's New

- ✓ Added the **Appraisal Method** dropdown menu, displaying the following options:
 - **Desktop Appraisal**
 - **Exterior Appraisal**
 - **Hybrid Appraisal**
 - **Traditional Appraisal**

How It Works

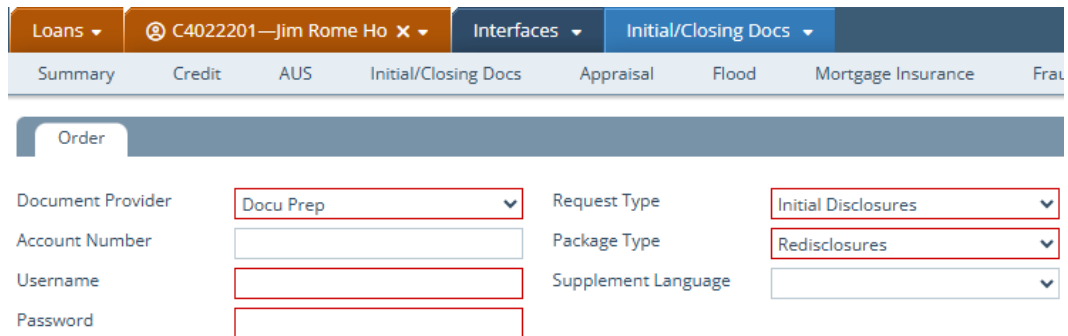
- ✓ After the order is submitted and the results gotten back, the selected **Appraisal Method** option will be populated in the *Appraisal Method* dropdown menu from *Production > Appraisals > Information* tab.

Initial/Closing Docs Screen

New Docu Prep Option (51339)

What's New

- ✓ Added **Docu Prep** to the *Document Provider* dropdown list.



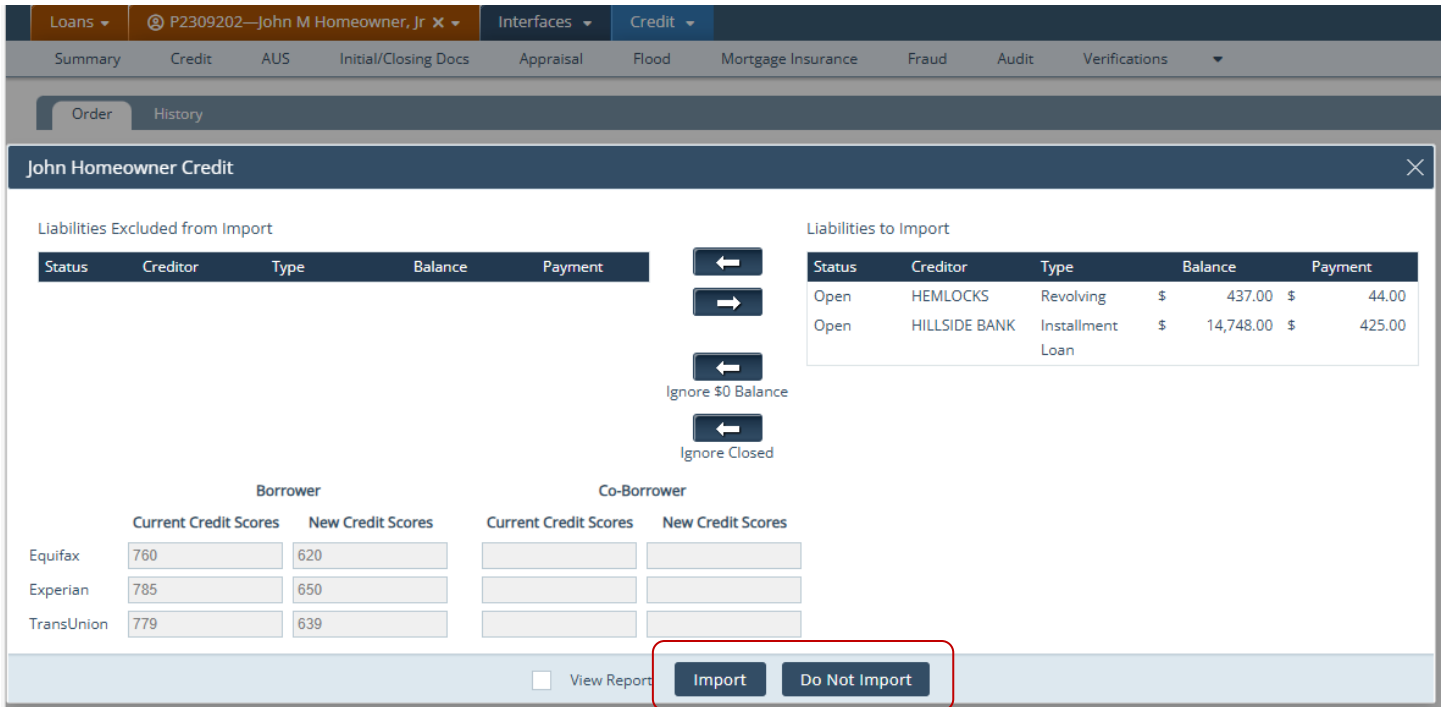
The screenshot shows a web interface for document preparation. At the top, there is a navigation bar with tabs: Loans, C4022201—Jim Rome Ho, Interfaces, Initial/Closing Docs (selected), and another tab. Below the navigation bar, there are several tabs: Summary, Credit, AUS, Initial/Closing Docs (selected), Appraisal, Flood, Mortgage Insurance, and Fraud. Underneath, there is an 'Order' section with a form. The form includes fields for Document Provider (set to 'Docu Prep'), Account Number, Username, Password, Request Type (set to 'Initial Disclosures'), Package Type (set to 'Redislosures'), and Supplement Language.

Credit Screen

Borrower Credit Import Lightbox Update (51800)

What's Updated

- ✓ To prevent credit data from getting out of sync, the *[Borrower Name] Credit* lightbox UI has been updated so users can no longer import credit scores and liabilities independently by default; instead, customers now see a simplified set of *Import* and *Do Not Import* buttons that encourages importing both together.



John Homeowner Credit

Liabilities Excluded from Import

Status	Creditor	Type	Balance	Payment

Liabilities to Import

Status	Creditor	Type	Balance	Payment
Open	HEMLOCKS	Revolving	\$ 437.00	\$ 44.00
Open	HILLSIDE BANK	Installment Loan	\$ 14,748.00	\$ 425.00

Borrower

	Current Credit Scores	New Credit Scores
Equifax	760	620
Experian	785	650
TransUnion	779	639

Co-Borrower

	Current Credit Scores	New Credit Scores

View Report **Import** **Do Not Import**

Important Note

- By default, only the *Import* and *Do Not Import* buttons are currently shown.
- To have the full set of buttons (*Import All*, *Import Liabilities*, *Import Credit Scores*, *Do Not Import*), contact Path Support.

Why it matters

- This update addresses scenarios where importing only one side (credit or liabilities) could result in mismatched data.

Production

Product & Pricing Screen

[New Business Channel Dropdown \(47174, 50162, 52095\)](#)

What's New

- ✓ Added the **Business Channel** dropdown menu to the *Loan Information* section.

Loans ▾	P2404042—John M Homeowner, Jr ✕ ▾	Production ▾	Product & Pricing ▾
Send/Status	Borrower	Property	Product & Pricing
		Transactions	Contacts

↑ Loan Information

Occupancy	Primary Residence ▾	Sales Price	\$
Lien Position	First ▾	Estimated Property Value	\$ 500,000.0
Loan Purpose	Construction ▾	Appraised Value	\$ 500,000.0
Other		Base Loan Amount	\$ 300,000.0
Refinance Type	▾	Total Loan Amount	\$ 300,000.0
Refinance Program	▾	Note Rate	7.000
Other		Loan Term/Due In (months)	360
Original Lender		Note Rate Monthly P&I	\$ 1,995.0
Loan Type	Conventional ▾	Down Payment Amount	\$
Other		Down Payment Percent	
Amortization Type	ARM ▾	UFMIP/FF Financed	\$ 0.0
Other		Borrower Financed Fees	\$

Business Channel ▾

↑ Product Information

Request Information

Lock Period

Product Type

Broker Comp Paid By

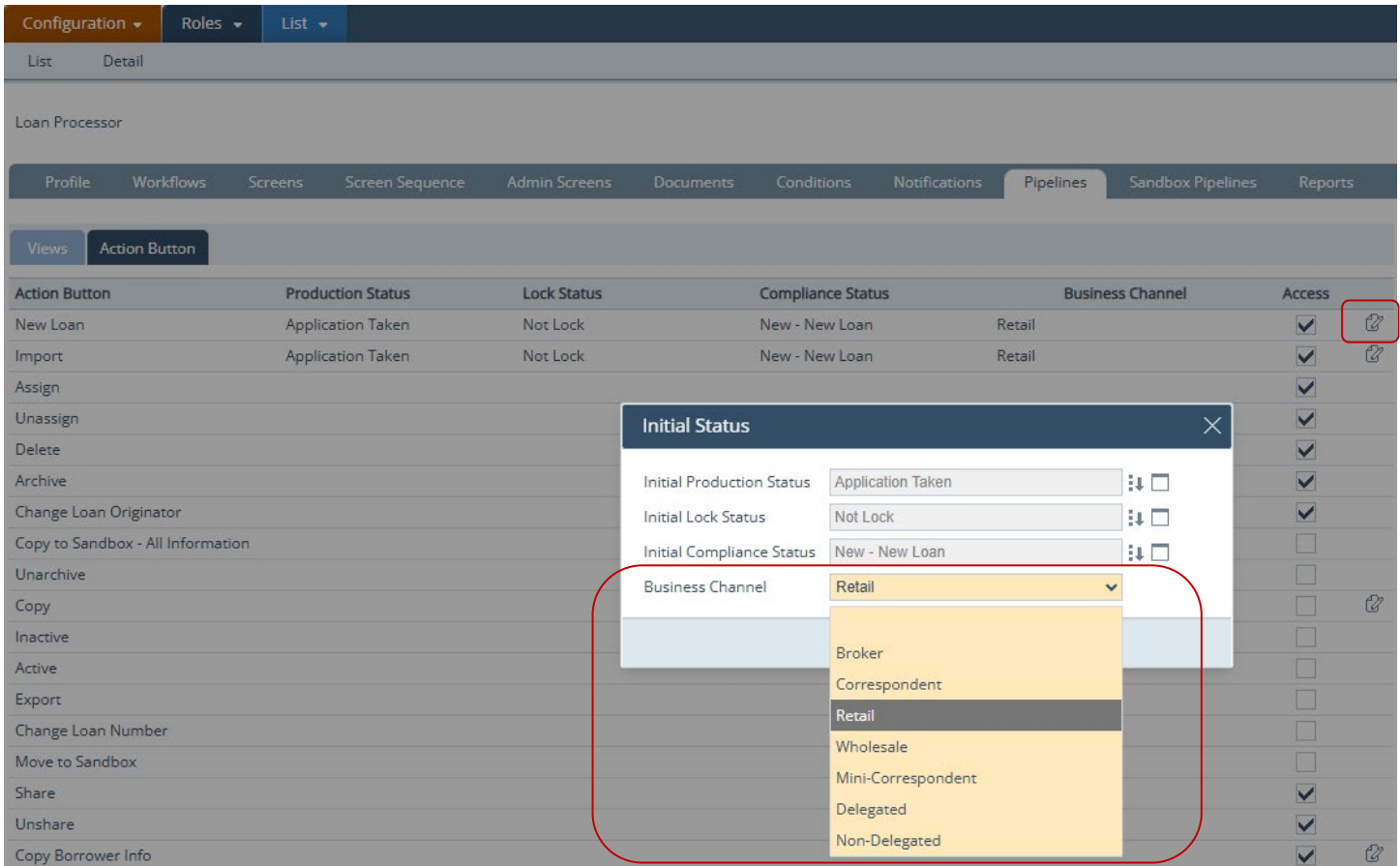
- Broker
- Correspondent
- Retail
- Wholesale
- Mini-Correspondent
- Delegated
- Non-Delegated

Purpose

- To allow users to indicate which **Business Channel** the loan is going through:
 - **Broker**
 - **Correspondent**
 - **Retail**
 - **Wholesale**
 - **Mini-Correspondent**
 - **Delegated**
 - **Non-Delegated**

Admin Note

- This dropdown list corresponds to the *Business Channel* dropdown from *Configuration > Roles > Pipelines > Action Button > Initial Status* lightbox.



- The selected option from the new **Business Channel** dropdown from *Loans* defaults to selected option from the *Business Channel* dropdown from *Configuration*.
- If *Retail* is selected in *Configuration*, the **Business Channel** dropdown will default to **Retail** in *Loans*.
- If the user in *Loans* changes the **Business Channel** dropdown to another option, it will not affect the *Business Channel* dropdown from *Configuration*.

Lock

OB lock Request Logic Update (51832)

What's Updated

- ✓ Updated the logic for OB lock requests to only export the months of reserves value when it is a positive value. When it is a negative value, it is not exported.

OB Lock Request Support Update (51828)

What's Updated

- ✓ Updated Optimal Blue lock requests to support debt service coverage ratio (DSCR).

HELOC Loans of OB Lock (51998)

What's Updated

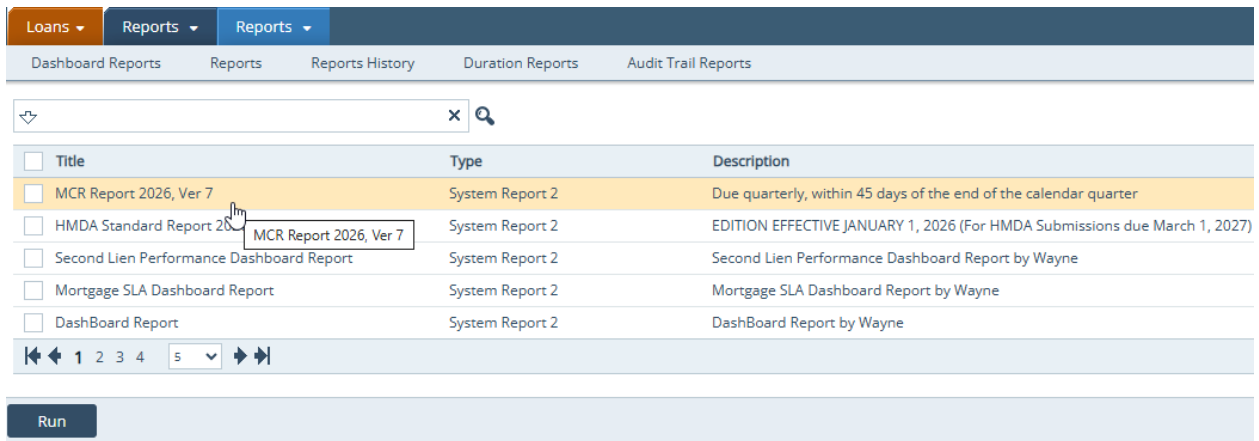
- ✓ Added the ability to send OB lock requests for HELOC loans.

Reports

MCR Report Update (52003)

What's Updated

- ✓ Updated the MCR Report 2026 to form version 7. Report name: **MCR Report 2026, Ver 7.**



The screenshot shows the Path Calyx Reports interface. At the top, there are navigation tabs: 'Loans', 'Reports', and 'Reports'. Below these are sub-tabs: 'Dashboard Reports', 'Reports', 'Reports History', 'Duration Reports', and 'Audit Trail Reports'. A search bar is present with a magnifying glass icon. The main content area is a table with the following columns: 'Title', 'Type', and 'Description'. The table contains the following rows:

Title	Type	Description
<input type="checkbox"/> MCR Report 2026, Ver 7	System Report 2	Due quarterly, within 45 days of the end of the calendar quarter
<input type="checkbox"/> HMDA Standard Report 2026, Ver 7	System Report 2	EDITION EFFECTIVE JANUARY 1, 2026 (For HMDA Submissions due March 1, 2027)
<input type="checkbox"/> Second Lien Performance Dashboard Report	System Report 2	Second Lien Performance Dashboard Report by Wayne
<input type="checkbox"/> Mortgage SLA Dashboard Report	System Report 2	Mortgage SLA Dashboard Report by Wayne
<input type="checkbox"/> DashBoard Report	System Report 2	DashBoard Report by Wayne

Below the table is a pagination control showing page 5 of 5. At the bottom of the interface is a 'Run' button.

Bugfixes

Configuration and Settings

[Email Signature Issue with Microsoft Graph API \(52007\)](#)

Issue

- ⚠ Previously, when notifications were sent using the Microsoft Graph API email delivery method (from *Configuration > Business Units > Settings > Email*), the user's *Email Signature* (from *Configuration > Users*) did not merge into the notification email (from *Settings > Notifications*).
 - This issue was not present when notifications were sent through SMTP.

Fix

- ✓ Now, the notification delivery via Microsoft Graph API now correctly merges the full user email signature, including embedded images, so MSGraph-sent notifications match SMTP behavior for signature output.

Loans

Lock

[Lien Type Issue for OB Lock \(51821\)](#)

Issue

- ⚠ Previously, when requesting an OB (Optimal Blue) lock for second lien loans, the request could fail with an error indicating that the first lien amount (*LoanInformation.FirstLienAmount*) was required.

Fix

- ✓ Updated the mapping logic for *LoanInformation.FirstLienAmount* in the OB Lock request so that it is correctly populated second lien loans.
- ✓ Now, OB Lock requests for second-lien loans are completed successfully.

Production

[Adding Borrowers Issue on Quote Screen \(52053\)](#)

Issue

- 🔧 Previously, in some cases, adding an additional borrower on the *Quote* screen would sometimes clear out the middle, suffix, and last names of the newly added borrower in the borrower table at the top, although these names would be retained in the section where the new borrower was added.

Fix

- ✓ Now, you can successfully add a borrower on the *Quote* screen without clearing out their middle, suffix, and last names in the borrower table at the top.

[Quote Screen Changes Not Updating Dashboard \(51900\)](#)

Issue

- 🔧 Previously, updates to loan values (such as *Purchase Price* or *Loan Amount*) on the *Quote* screen were not immediately reflected on the loan's *DASHBOARD*, even after saving. The dashboard continued to display outdated values until users navigated to another screen (e.g., *Loan Transmittal*).

Fix

- ✓ Now, the *DASHBOARD* values now stay in sync with *Quote* screen updates.

[HMDA Loan Amount at Application Date Issue \(52046\)](#)

Issue

- 🔧 Previously, the *HMDA.LoanAmountatApplicationDate* field did not behave consistently. Changes to the field were not always captured in the audit log, and the value did not reliably auto-populate in all scenarios.

Fix

- ✓ Updated the field logic to ensure that the field now reliably populates and tracks changes, ensuring consistent HMDA data accuracy and eliminating inconsistencies caused by input timing or missing audit records.

[Autofill Rule Value Reverting on Dashboard \(51993\)](#)

Issue

- 🔧 Previously, in certain cases, when using autofill rules to update the *Loan.Channel* field, the value would appear to update briefly on the loan's *DASHBOARD* but then revert back to the original value.

Fix

- ✓ Now, changes to *Loan.Channel* are always properly saved and remain visible on the *DASHBOARD*.

Pipelines

Missing File Import Option (52030)

Issue

- 🐛 Previously in rare occasions, clicking the Import button (from *Loans > Pipelines*) opened the old *Import* lightbox, which did not display the options to choose FNM 3.2 or ULAD 3.4 file formats.

Fix

- ✓ Now, the clicking the Import button always opens the updated *Select File Format* lightbox, displaying both options.

Lock and Production

Citizenship Issue for V3.1 Pricing (50938)

Issue

- 🐛 Previously, in rare cases, certain selected *Citizenship* options from *Production > Quote* screen would be cleared out after running V3.1 pricing.

Fix

- ✓ Now, all *Citizenship* options are retained after running V3.1 pricing.

Production and Documents

Quote Screen Not Saving Correctly When Loan Templates Were Used (52047)

Issue

- 🐛 Previously, after applying loan templates, data entered/edited in the *Preferred Language* dropdown menu on the *Quote* screen did not save correctly by default. This led to issues with printing the entered/edited data on forms, such as the *Supplemental Consumer Information* form.

Fix

- ✓ Now, the *Preferred Language* dropdown on the *Quote* screen is correctly saving after templates are applied to the loan and the forms are correctly printing the entered/edited data.