Path Service Pack 2 Release Notes

May 2024

This Path service pack is scheduled for production release on May 19, 2024, 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*.

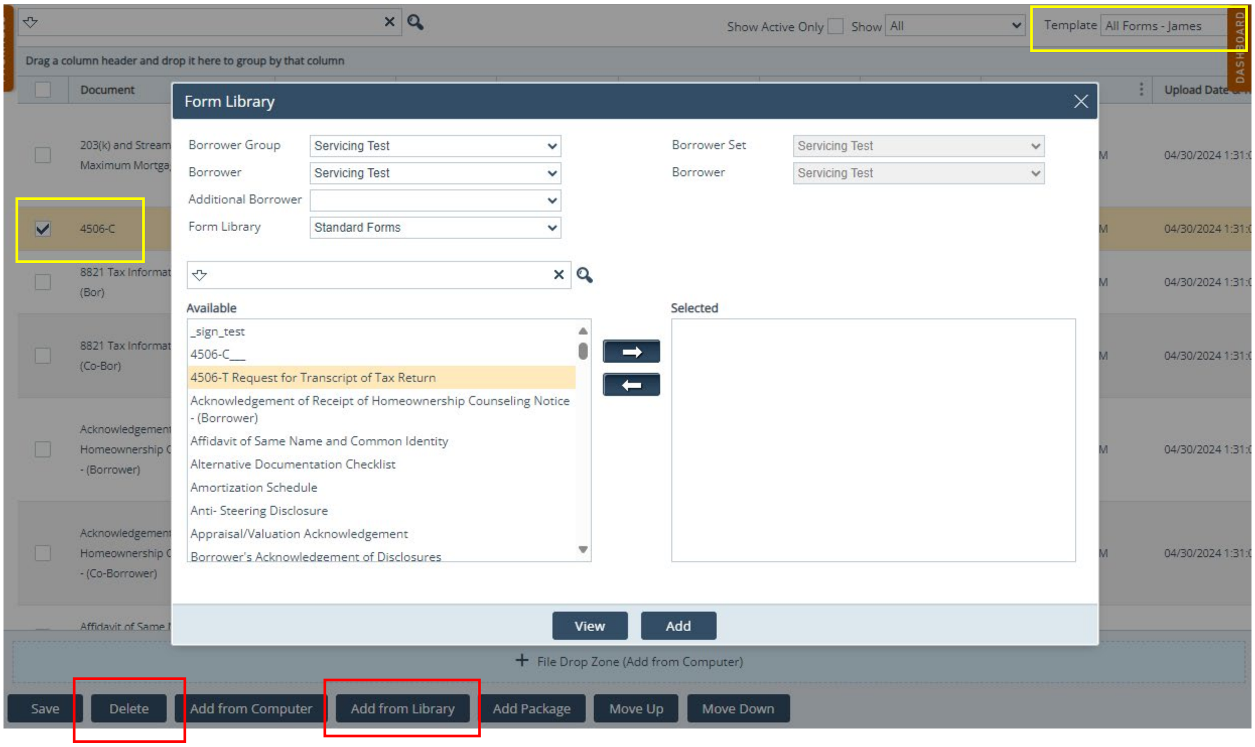
> Note: IFR (items for review) IDs are displayed at the end of items where applicable. Bugfixes are indicated by .

Loans

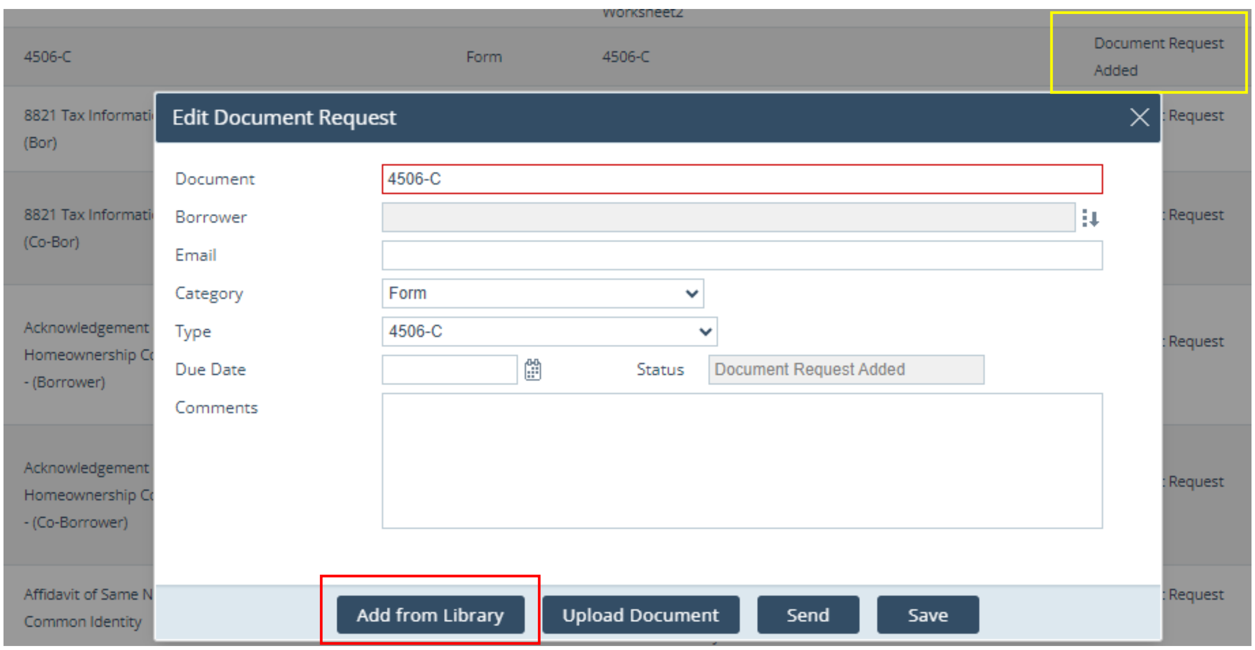
Documents

✓ Enhanced the process of generating documents within Path, by adding the **Add from Library** button to the *Edit Document Request* lightbox, which is used for completing document requests.
(49332)

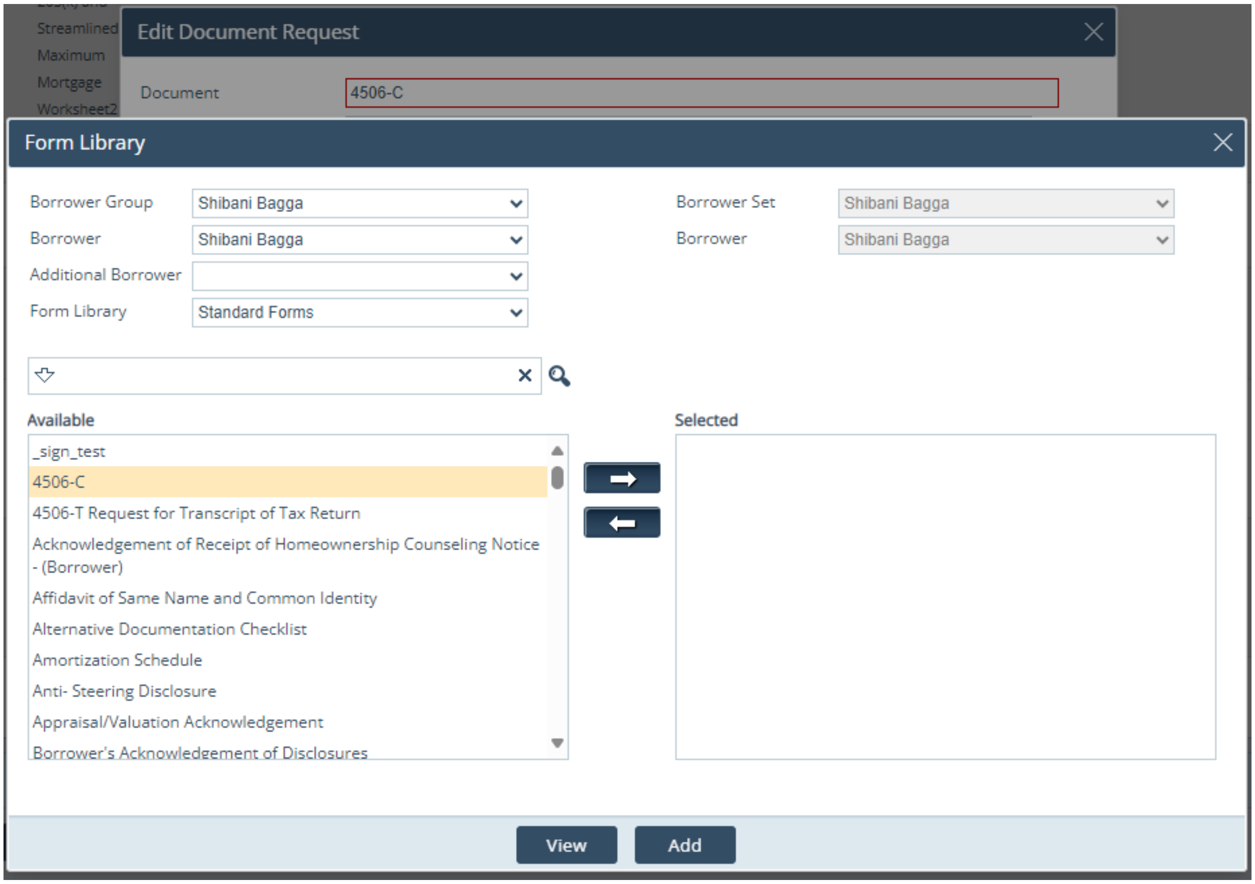
- Currently, when users are generating a document within Path, via the *Add from Library* button > *Form Library* lightbox, the generated document is added to *Documents*, but the document request still remains, which requires users to perform additional steps to delete it.
    - As shown in the example below, a template is selected, containing the document request for the 4506-C form.



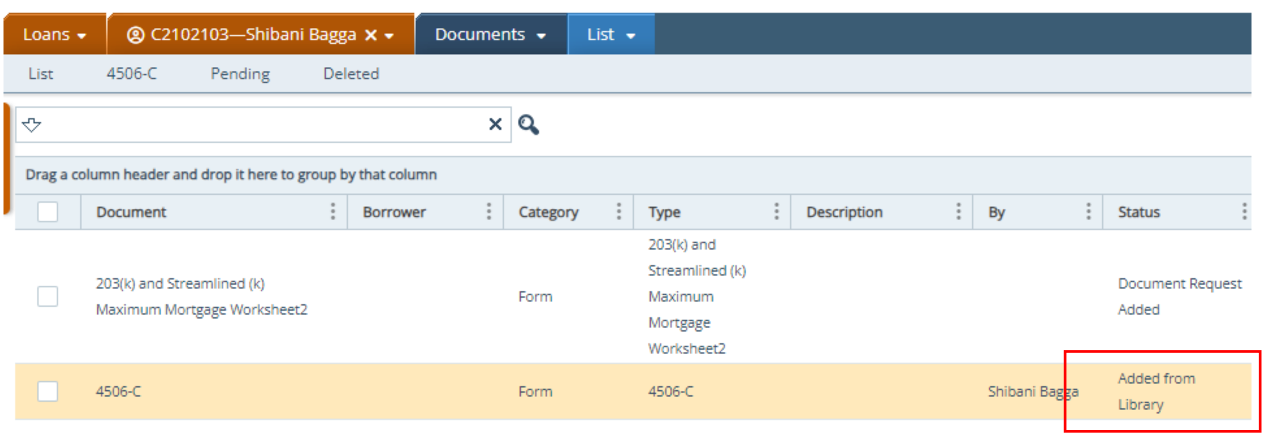
– Now, with the **Add from Library** button inside the *Edit Document Request*, users can simply open the lightbox and click **Add from Library**, as shown below.



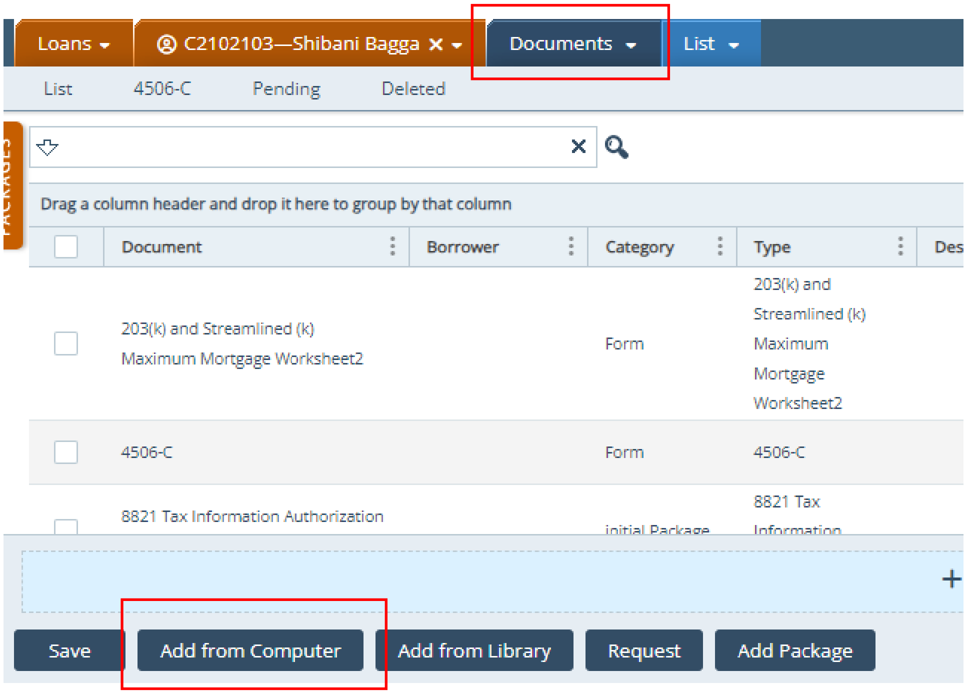
– Same as before, the *Form Library* lightbox opens and users can select the corresponding document to be generated via the *Add* button. But the crucial improvement/difference is that the document request is removed and replaced with the newly generated document, via the following background processes:



- The system recognizes the selected document request has been fulfilled.
- The entry that used to be a document request (with the *Document Request Added* status) is automatically updated to the actual document entry (with the *Added from Library* status), indicating the completion of the document request, as shown below.



- To reiterate, this new **Add from Library** button (in the lightbox) behaves differently from the existing *Add from Library* button in the *Documents* activity.



- While the existing *Add from Library* button (highlighted above) adds the document, it does not replace the document request. Both entries will be listed (the request and the document). Extra steps are needed to delete the document request.
- The new **Add from Library** button (in the *Edit Document Request* lightbox) not only adds the document but also removes the document request, simultaneously updating the *Status* to *Added from Library*, relieving users from any further steps.

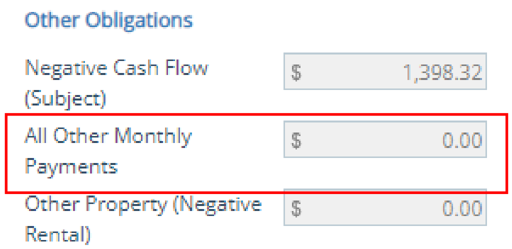
✓ Document *Category* dropdown menus, which were disabled (read-only) for R1 2024, are now re-enabled for users to freely select from.
(49351)

- Note that any *Category* can still be paired with any *Type* as was implemented in R1 2024.
- The purpose of this update is to re-enable the *Category* dropdown.

Production

Loan Transmittal Screen

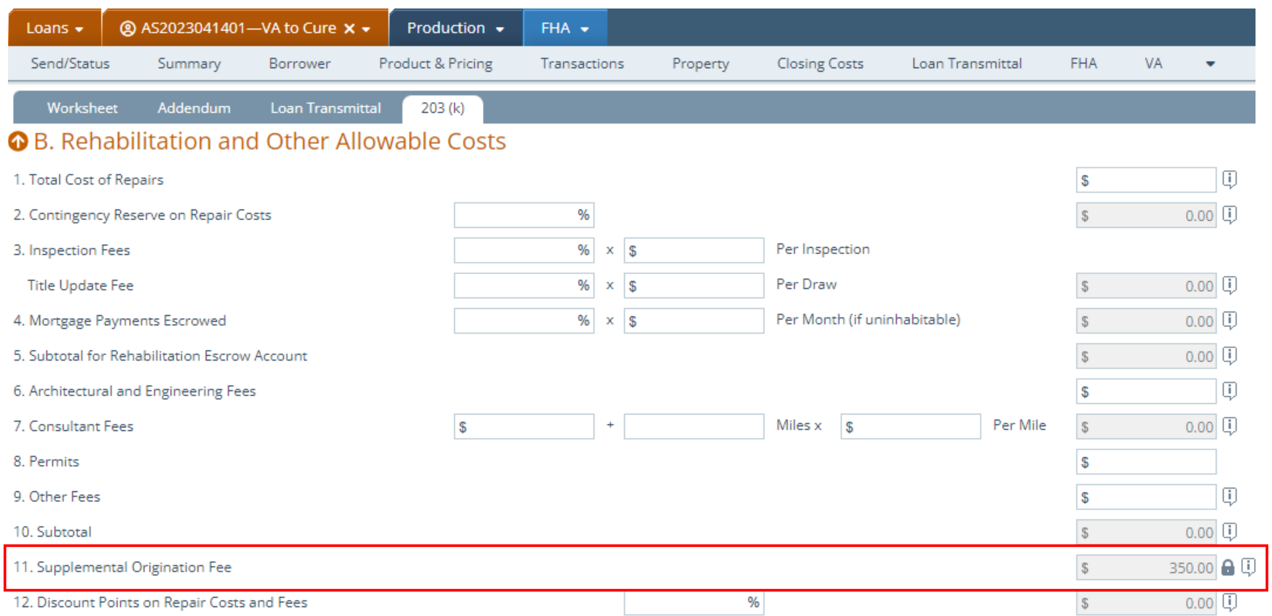
✓ Updated the *III. Underwriting Information* section > *All Other Monthly Payments* field (field ID: LiabilityTotal.TotalMonthlyPayments) to include the liabilities of the non-purchasing spouse for FHA, VA, or USDA loans in community property states (*Property screen* > *Subject Property Information* section > *Property Is in a Community Property State* checkbox).
(49077)



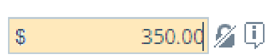
- Previously, the liabilities of the non-purchasing spouse were not included and were transferred to the purchasing spouse (borrower).
- Now this is corrected, as Path is the system of record and needs to account for which liability belongs to which person.

FHH Screen > 203 (k) Tab

✓ Added the lock icon ( ) to the *11. Supplemental Origination Fee* field.
(49333)

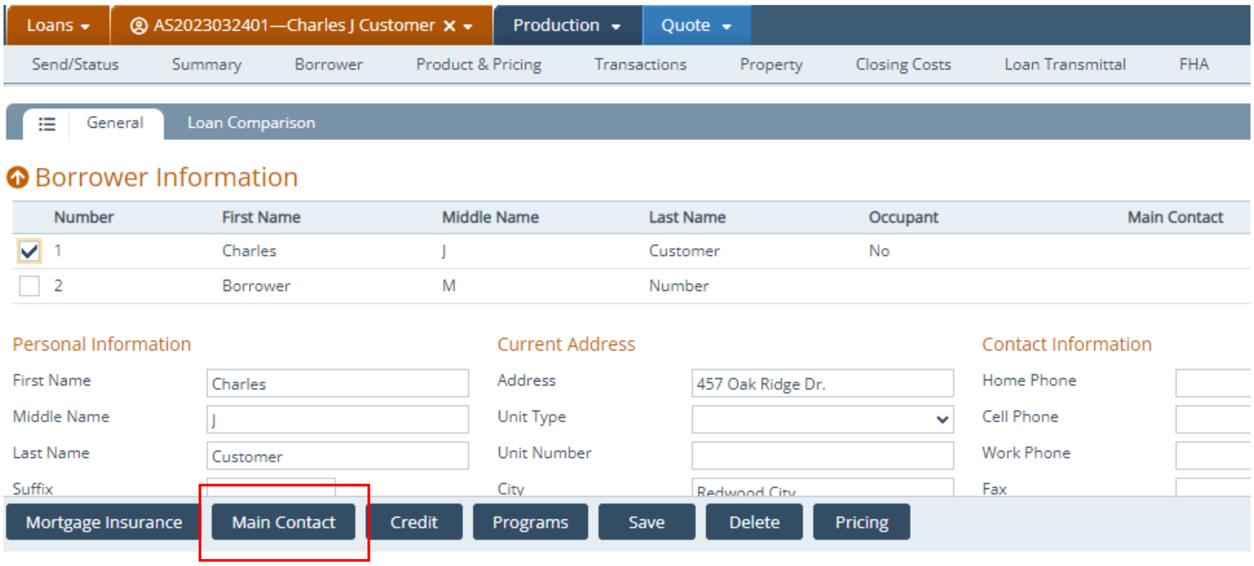


- Previously, this field was read only.
- By adding the lock icon, users can now unlock it to edit or remove this fee, as shown below.



Quote Screen > General Tab

✓ Added the Main Contact button, which mirrors the functions of the corresponding button on the *Borrower* screen.
(49297)



- Use this button to set the selected borrower as the primary contact for a loan.

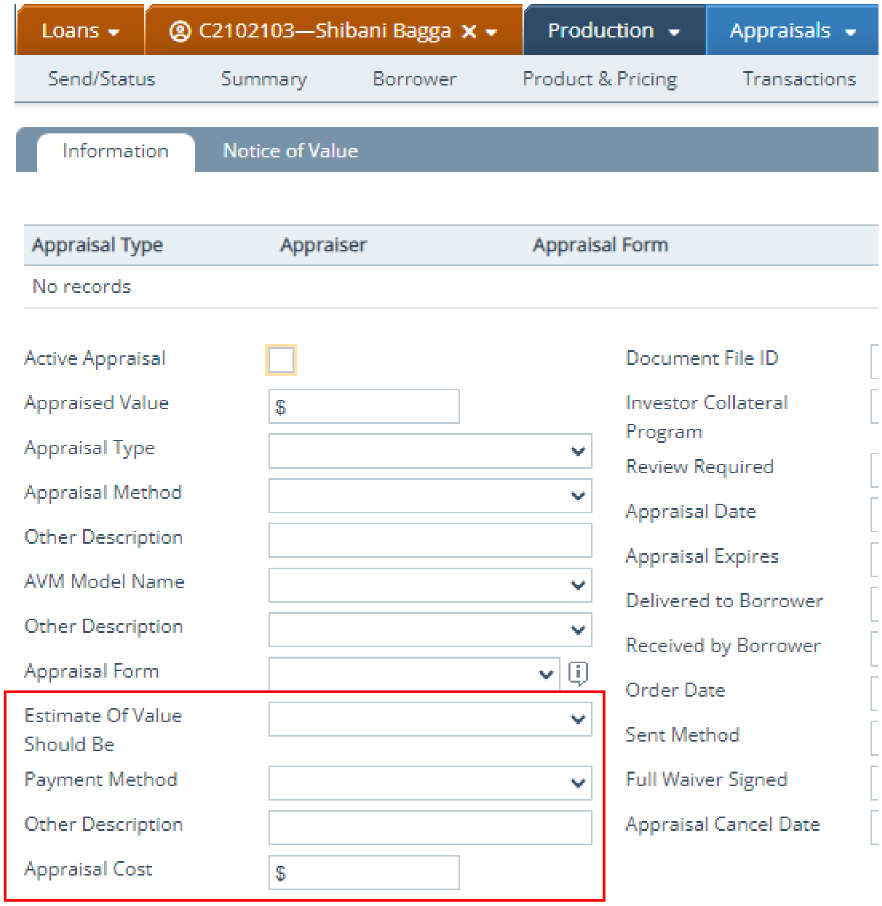
Note: This button DOES NOT set the selected borrower as the primary borrower.

Production and Documents

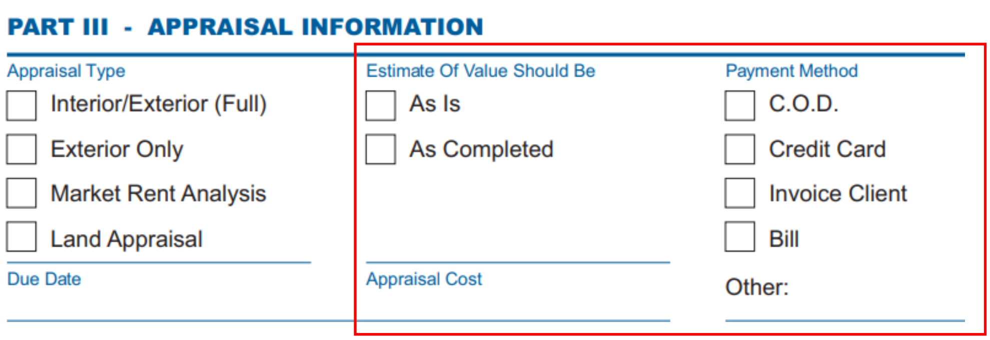
Appraisals Screen > Information Tab

✓ Added new fields to be mapped to the Request for Appraisal (CF-REQAPR) form > Part III – Appraisal Information section, which are listed as the following:
(46469)

- **Estimate Of Value Should Be**
- **Payment Method**
- **Other Description**
- **Appraisal Cost**



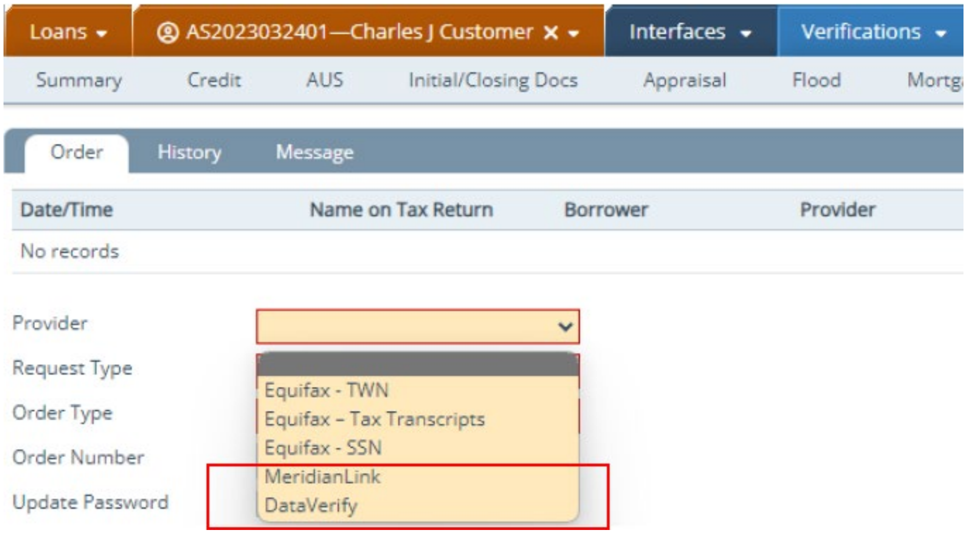
- The fields highlighted in the above image are mapped to their corresponding fields on the form, as shown below.



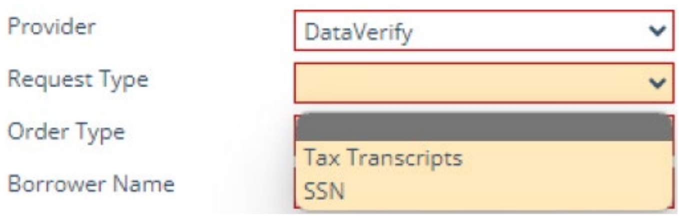
Interfaces

Verifications Screen > Order Tab

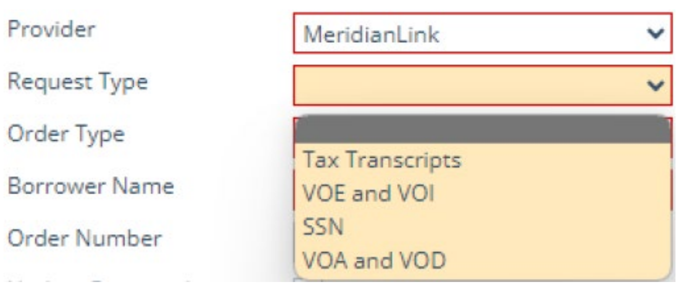
✓ Added **MeridianLink** and **DataVerify** as service providers. (48919)



- When **DataVerify** is selected, users can request **Tax Transcripts** and **SSN**.



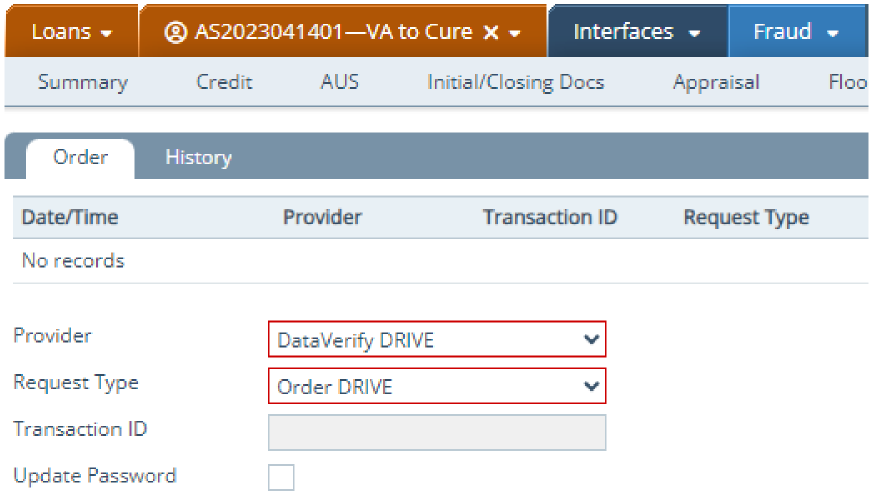
- When **MeridianLink** is selected, users can request **Tax Transcripts**, **VOE and VOI**, **SSN**, and **VOA and VOD**.



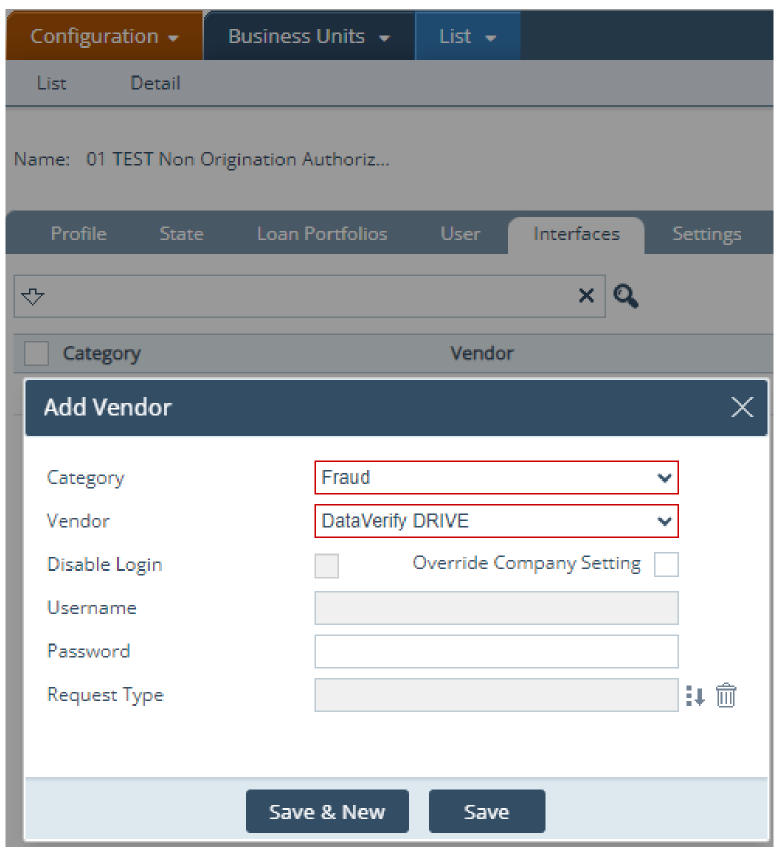
  - Additionally, when the requested verifications are returned from **MeridianLink** (in responseXML format, containing CID XPaths), the **Import from VOE/VOI Order** and **Import from VOA/VOD Order** lightboxes are launched, where users can choose to import VOE/VOI and VOA/VOD data into Path.
(49006)

Fraud Screen > Order Tab

✓ Updated the *Provider* and *Request Type* dropdown menus, by adding **DataVerify DRIVE** and **Order DRIVE**, respectively.
(48969)



- Correspondingly, relabeled the *DataVerify Fraud Conditions* section to **Data Verify DRIVE Conditions** on *the Compliance* > *Summary* screen.
- Correspondingly, added **DataVerify DRIVE** to the *Vendor* dropdown to *Configuration* > *Business Units* > *Interfaces* > *Add Vendor* lightbox.

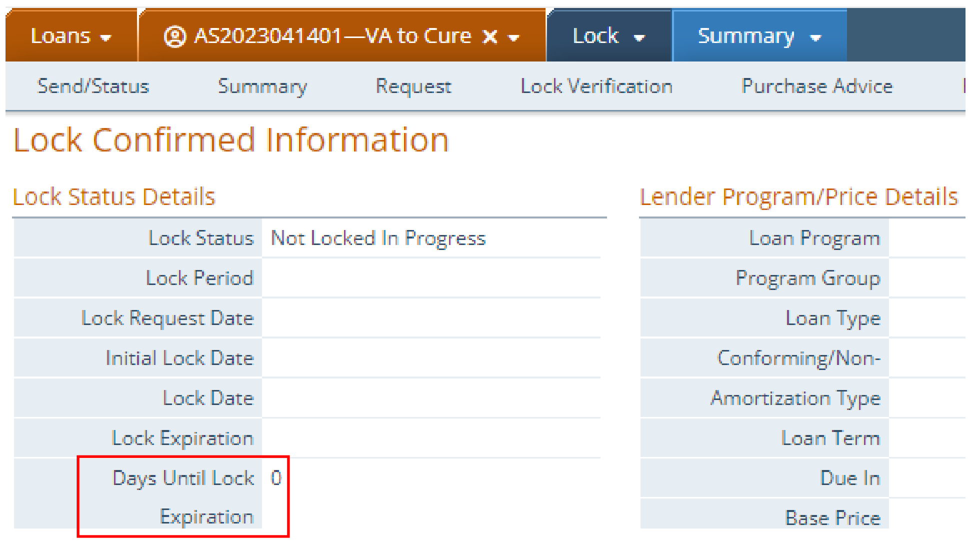


- Here, the system admin can configure the login credentials for users in *Loans*.

Lock

Summary Screen

- ✓ Relabeled the *Day Until Lock* field to the more informative **Day Until Lock Expiration**. (49377)



Pricing

- ✓ Added **Save** buttons to the *Product Availability Search* and *Eligibility Check* lightboxes. (48189)