



path
calyx



RELEASE NOTES

October 13, 2024

Path Release Notes

This Path release is scheduled for production release on October 13, 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



Interfaces

VA Loan Review Screen

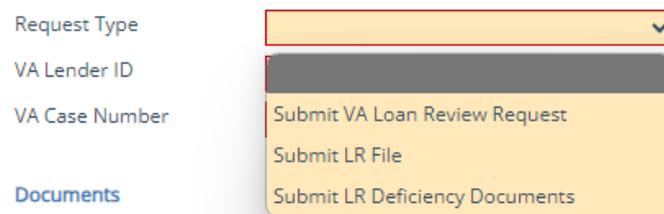
Added the **VA Loan Review** screen, which is used to streamline and expedite the submission of post-close loan review documents to the VA. All done through Path *Interfaces*.

(49738)

- ✓ Currently, lenders/users must use WebLGY to manually upload these documents.
- ✓ With the new **VA Loan Review** screen, all the necessary post-close loan review documents can be submitted to the VA from within Path.
 - Not only does this allow for a fully automated VA loan review process but also improves data accuracy.
- ✓ This screen is used for:
 - Purchase loans
 - Refinance cash-out loans
 - Refinance no cash-out loans

Order Tab

- ✓ The **Order** tab is where users submit documents to the VA.
- ✓ The Request Type dropdown allows users to select the appropriate submission of documents.



The screenshot shows a form with the following fields: Request Type, VA Lender ID, VA Case Number, and Documents. The Request Type dropdown menu is open, showing three options: Submit VA Loan Review Request, Submit LR File, and Submit LR Deficiency Documents.

- For first time submissions, select **Submit VA Loan Review Request**.
 - Enter the **VA Lender ID** and **VA Case Number**.
- After the first submission has been successful, then select either **Submit LR File** or **Submit LR Deficiency Documents** for subsequent submissions.

Loans ▾ @ AS2023033001 —Bill Firstimer ✕ ▾ Interfaces ▾ VA Loan Review ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance Fraud Audit Verifications VA Loan Review ▾

Order History

Date/Time	Request Type	VA Lender ID	VA Case Number	Status	Message	By
No records.						

Request Type

VA Lender ID

VA Case Number

Documents

<input type="checkbox"/> VA Document Name	Path Document Description	Attached
<input type="checkbox"/> 1. Lender's cover or transmittal letter (if used).		
<input type="checkbox"/> 2. VA Form 26-8937, Verification of VA Benefits (if applicable)		
<input type="checkbox"/> 3. Evidence of compliance with Notice of Value requirements, s...		
<input type="checkbox"/> 4. Uniform Residential Loan Application. • The initial and final a...		
<input type="checkbox"/> 5. Purchase Agreement including all contract addendums and t...		
<input type="checkbox"/> 6. Closing Disclosure Statement		
<input type="checkbox"/> 7. Pricing Sheet (valid at time of rate lock)		
<input type="checkbox"/> 8. VA Form 26-8497, Request for Verification of Employment, an...		
<input type="checkbox"/> 9. Credit Alert Verification Report System (CAIVRS): borrower/co...		
<input type="checkbox"/> 10. All original credit reports obtained in connection with the lo...		
<input type="checkbox"/> 11. VA Form 26-8497a, Request for Verification of Deposit, and ...		
<input type="checkbox"/> 12. AUS Feedback Certificate and underwriter's certification		
<input type="checkbox"/> 13. VA Form 26-1820, Report and Certification of Loan Disburse...		
<input type="checkbox"/> 14. VA Form 26-6393, Loan Analysis		
<input type="checkbox"/> 15. If a loan is submitted more than 60 days after loan closing, a...		
<input type="checkbox"/> 16. VA Form 26-0592, Counseling Checklist for Military Homebu...		

Submit Save Un-Attach

- ✓ The **Documents** table lists all the relevant documents that can be submitted.
 - There are over twenty rows and each row correspond to a category of documents requested by the VA.
 - Documents can be uploaded from the computer via the upload icon ().
 - Or they can be added from Path's form library via the add icon ().
 - After the relevant documents have been uploaded or added, click **Submit**.
- Note: The list of documents displayed (the stacking order and categories) are subject to change depending on whether the VA loan is a purchase, cash-out refinance, or no cash-out refinance.
- The size of all documents cannot exceed 100 Mb (12.5 MB). (50037)
 - If the size of all documents exceeds 100 Mb, divide them into chunks of documents less than 100Mb, with **Submit VA Loan Review Request** as the first **Request Type** and **Sumit LR File** subsequently until all files are submitted.
 - If the VA asks for more documents, select **Submit LR Deficiency Documents** as the **Request Type**.

Note: Up to five documents can be submitted at one time when choosing this **Request Type**.

History Tab

- ✓ The **History** tab shows the history of all the document submissions.

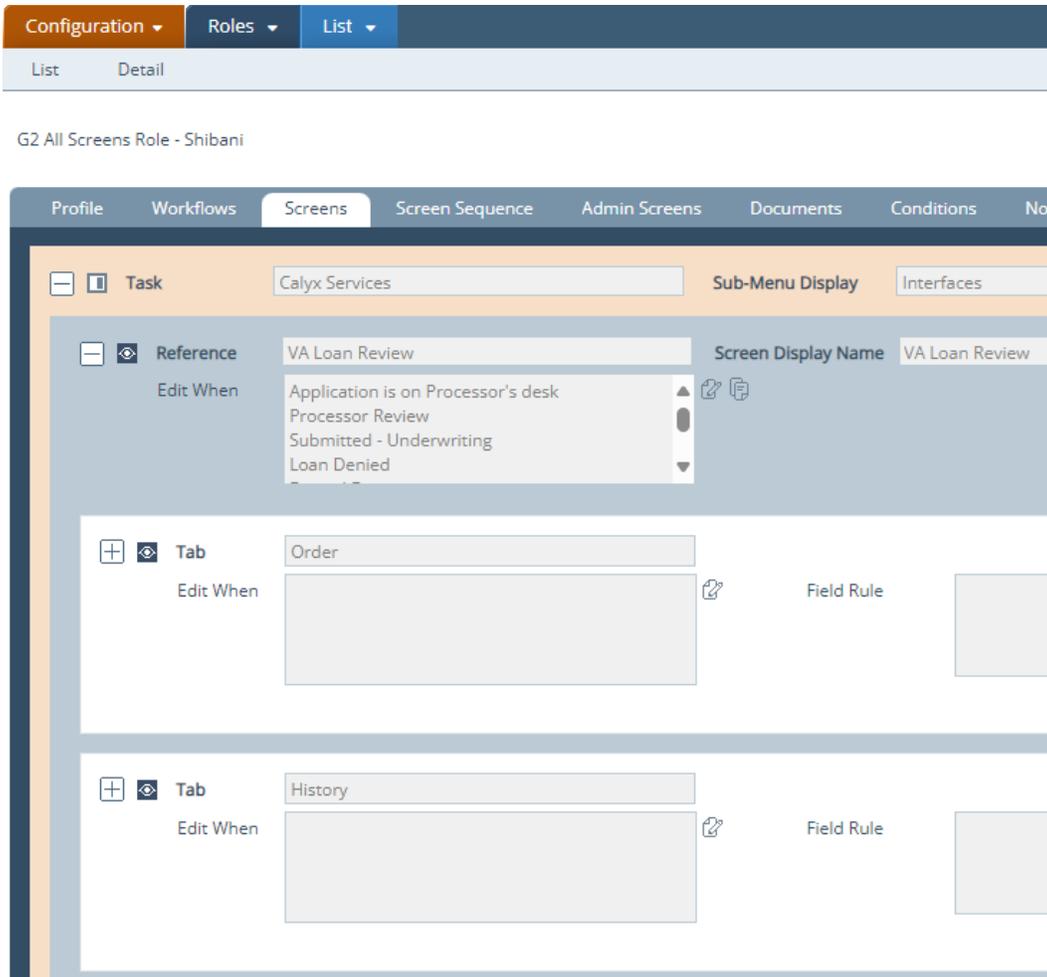


The screenshot shows a software interface with a top navigation bar containing 'Loans', 'AS2023033001—Bill Firstimer', 'Interfaces', and 'VA Loan Review'. Below this is a sub-menu with options: Summary, Credit, AUS, Initial/Closing Docs, Appraisal, Flood, Mortgage Insurance, Fraud, Audit, Verifications, and VA Loan Review. A secondary bar shows 'Order' and 'History' tabs. Below the tabs is a table header with columns: Date/Time, Request Type, VA Lender ID, VA Case Number, Status, Message, and By. The table content is empty, with the text 'No records.' displayed below the header.

Configuration

Roles > Screens > Loan > Interfaces

- ✓ As with any new screen, system administrators need to enable the **VA Loan Review** screen for the roles that are selected to have access to this screen and its tabs.



Appraisals Screen

Mercury Get Values Lightbox

- ✓ Added new **Mercury Property Type** dropdown, which displays the full list of property types accepted by the vendor.
(49840)

Bugfixes

Property Screen

- 🔧 Updated the *Non-Warrantable Condo* checkbox, where it is now correctly saved when checked. (49937)

Transactions Screen

Other Financing Details Lightbox

- 🔧 Updated the *Creditor Name* field, where it is now correctly saved when loans are linked. (49950)

Documents

- 🔧 Updated the sending of multiple documents via email, where each document retains its correct name in the email. (49927)

Note Rate in Notification Emails

- 🔧 Updated the note rate in notification emails, where the note rate is not rounded and remains three digits to the right of the decimal point. (49790)