VIDEO TRAINING

path
calyx

RELEASE NOTES
September 8, 2024

Path Release Notes

September 2024

This Path release is scheduled for production release on September 8th, 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 🛠️.

Login

✓ Updated login question fields where forward slashes (/) are auto-populated when entering dates, such as date of birth.
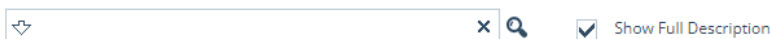(49705)

Conditions

✓ Updated the display of conditions to default to a compacted view, where each row only occupies one line of text, which cleans up the UI and reduces scrolling, as shown below.

	Type	Category	Description	Status	Date/Time	Issued To
☐	PTD	Valuation / App…	APPRAISAL REPORT - SFR /PUD: Provide fully completed ap…	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTD	TPO	1003- INITIAL: Initial Completed 1003 signed and dated by …	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTD	Title	PRELIMINARY TITLE: Provide Prelim Title to include 24 mon…	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTF	Title	CLOSING PROTECTION LETTER: Title to provide closing pro…	New	07/31/2024 9:07:57 AM	Account Manager,Close…
☐	PTS	Property	SALES CONTRACT: Fully executed sales contract including …	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTD	Property	MAX SELLER CONCESSIONS: Sellers concessions may not e…	New	07/31/2024 9:07:57 AM	Account Manager,CD/D…
☐	PTD	Property	FLOOD CERTIFICATE: Life of Loan flood certificate to indica…	New	07/31/2024 9:07:57 AM	Account Manager,Proc…
☐	PTD	Insurance	HAZARD INSURANCE COVERAGE: Provide Insurance cover…	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTD	Income	TRUST EARNINGS : Trust income being used to qualify with…	New	07/31/2024 9:07:57 AM	Account Manager,Exter…
☐	PTS	Income	INTEREST AND DIVIDEND INCOME 1099 DIV OR 1099 INT: …	New	07/31/2024 9:07:57 AM	Account Manager,Exter…

– However, the full details of each condition (such as the full description text) can still be displayed by simply selecting the new **Show Full Description** checkbox (same as the Wrap Text feature in Excel) as shown below.
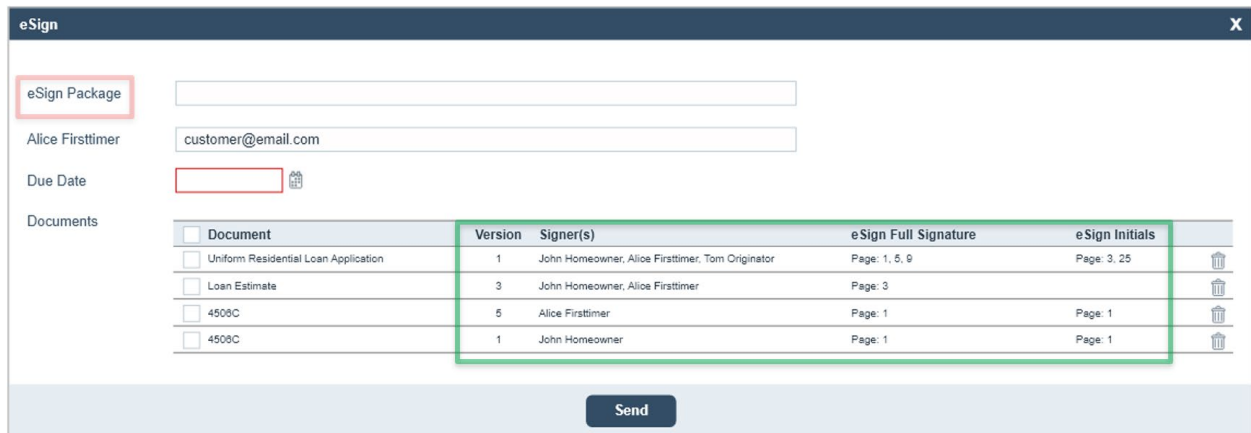
⟱ ✕ 🔍 ☑ Show Full Description

	Type	⋮	Category	⋮	Description	⋮	Status	⋮	Date/Time	⋮	Issued To
☐	PTD		Valuation / Appraisal / AVM / Internal Valuation		APPRAISAL REPORT - SFR /PUD: Provide fully completed appraisal on forms 1004 specific to property type including appraiser's license with proof of appraisal upload and SSR or LCR Report		New		07/31/2024 9:07:57 AM		Account Manager,External,Pr
☐	PTD		TPO		1003- INITIAL: Initial Completed 1003 signed and dated by all parties		New		07/31/2024 9:07:57 AM		Account Manager,External,Pr

✓ Additionally, user preferences/adjustments (such as column width, height, grouping, and **Show Full Description** checkbox) are saved for when the user leaves and comes back to *Conditions*. (49847)

Documents

✓ Updated the **eSign** lightbox, by adding more useful information. (49391)

– Relabeled the *Package Name* field to **eSign Package**.

– Added the **Version**, **Signer(s)**, **eSign Full Signature**, and **eSign Initials** columns to display more details.

- **eSign Full Signature** and **eSign Initials** columns indicate the pages that has full signatures and initials, respectively.

✓ Added the **Summary** screen, to display the status and history of eSgin documents

Status	Signer(s)	eSign Package	Due	Request	Received	Sent By
Expired	ESIGN TEST, ESIGN TEST, ESIGN TEST, Sung Park	esign test	8/30/2024	8/9/2024 11:51 AM		Sung J Park Sr.
Expired	ESIGN TEST	4506-T Request for Transcript of Tax...	8/29/2024	8/14/2024 2:53 PM		Sung J Park Sr.
Expired	ESIGN TEST	Sung Test	8/30/2024	8/22/2024 9:32 AM	8/22/2024 9:34 AM	Sung J Park Sr.

- In the **Sent By** column of the **Pending** table, there are two icons.


- Click ≡⊠ to resend the same eSign package.

- Click 📝⊗ to cancel the eSign package (all documents within the package).
(49560)

✓ Added the **eSign Package Details** lightbox, for the new **Summary** screen.
(49720)

- The top table details the progress/status the signer(s) of the eSign package.

- The bottom table details the individual documents in the eSign package.

- Click on 🗎 to display the documents.

    • Which version displayed depends on whether the eSign package has been completed or still pending.

Compliance and Production

Closing Costs Screen

Loan Estimate and Closing Disclosure Tabs

✓ Updated the *Standard Form* dropdown menu on the *Closing Disclosure* tab, which is now automatically populated with the selected option (*Yes* or *No*) from the corresponding dropdown on the *Loan Estimate* tab.
(49700, 48639)

<div align="center">

Standard Form | Yes ▾ |

</div>

- For example, when *Yes* is selected from the *Standard Form* dropdown on the *Loan Estimate* tab, it is automatically copied over to the *Standard Form* dropdown on the *Closing Disclosure* tab.

- Additionally, the *Closing Disclosure* tab's *Standard Form* dropdown has been made read-only.

✓ Updated the *Late Charge Days* and *Late Charge Percentage* fields on the *Closing Disclosure* tab, where the values in these fields are copied over from the *Loan Estimate* tab.
(49701)

Late Charge Days | 15

Late Charge Percentage | 5.000 % | No Late Charges ▾

- Additionally, these fields are also now read-only on the *Closing Disclosure* tab.

- However, they become editable via the new **Edit Late Charge** checkbox.

- Note that if these values are edited on the *Closing Disclosure* tab, the corresponding values from the *Loan Estimate* tab will no longer copy over.

✓ Added the ability to remove the loan estimate, closing disclosure, and intent to proceed after being sent out.
(49763)

- The **Remove LE** and **Remove Intent to Proceed** buttons are added to the *Loan Estimate* tab.

- The **Remove CD** button is added to the *Closing Disclosure* tab.

- Note that the system administrator needs to enable these buttons in *Configuration > Roles > Screens* to make them available for users in *Loans*.

Production

Contacts Screen

Loan Contacts Tab

✓ Updated the *Closing Lender > Company* field to allow for 256 characters.
  (44436)

Summary Screen

✓ Added the **Underwriting Decision** section, which displays the following information:
  (48031)

  – **Decision**
  – **Decision Date**
  – **Approval Expiration Date**

Closing Information Screen

General Tab > Trustee Lightbox

✓ Updated the *Name* field to allow for 100 characters.
  (49059)
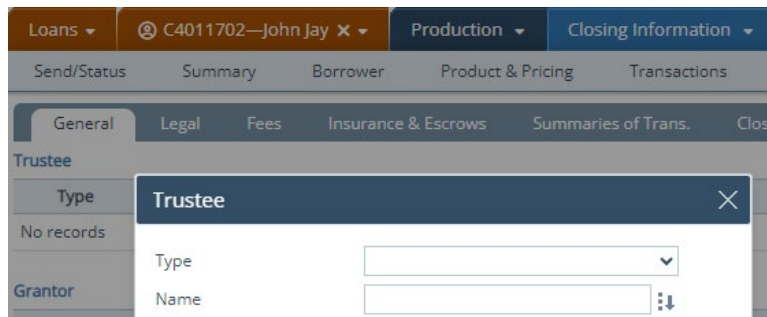
Pipeline

✓ Update the search function to enable search by co-borrower name, SSN, ZIP, and County.
  (45445) (49733)

✓ Added the new **Copy Borrower** button, which only copies borrower data.
  (49791)

Interfaces

Initial/Closing Docs Screen

Document Provider > DocMagic Direct

✓ Added the **UCD File Generation** dropdown and **Document Set Identifier** field, to help identify and categorize returned documents.
(49690)

✓ Added an edit icon (📝) to the *Alternate Lender Code* field, which opens the new **Alternate Lender Code** lightbox.
(47644)

Alternate Lender Code		✕
Search		
🔍 ↻		
Alternate Lender	**Address**	**Code**
WELLS FARGO BANK	1234 Sample St, San Jose CA 95120	RH201
Bank of America	5678 Test St, San Jose CA 95120	AZ360
FIRST BANK MORTGAGE GROUP	1054 Data Drive, San Jose CA 95120	BC360
Umpqua Bank	1234 Sample St, San Jose CA 95120	NH407
CITI Bank	1234 Sample St, San Jose CA 95120	AX970
Chase Bank	1234 Sample St, San Jose CA 95120	AB200
JP Morgan	1234 Sample St, San Jose CA 95120	MN404
Hanmi Bank	1234 Sample St, San Jose CA 95120	JH901
Hanmi Bank	1234 Sample St, San Jose CA 95120	FR202
	Order	Cancel

– Here, users can select alternate lender codes to export to DocMagic.

Bugfixes

🐞 Updated email notifications, where the sender's email signature is now correctly appearing in the footer of the email.
(49538)

🐞 Updated *Document Image View*, where uploaded documents are now displaying correctly.
(49603)

🐞 Updated the *Include in Construction Payment* dropdown, where is it now behaving correctly (*Transactions* screen).
(49785)

Additional Fields

Notifications

✓ Added the following fields to *Settings > Notifications*:
(49832)

- **RequestLock.LockPeriod**
- **RequestLock.ProductProgramName**
- **RequestLock.LockPrice**
- **RequestLock.notes**
- **CurrentStatus.LockStatus**

Pricing

Pricing Search Parameters Lightbox

✓ To support Optimal Blue version 3, updated the *Documentation Program Type* dropdown menu to include the following options:
(49656)

- **Business Bank Statement 1 Month**
- **Business Bank Statement 3 Months**
- **Business Bank Statement 6 Months**
- **Business Bank Statement 18 Months**
- **Investor No Ratio**
- **No Investor Income**
- **One Year Alt Doc**
- **One Year 1099**
- **Personal Bank Statement 1 Month**
- **Personal Bank Statement 3 Months**
- **Personal Bank Statement 6 Months**
- **Personal Bank Statement 18 Months**
- **Profit and Loss One Year**
- **Profit and Loss Two Year**
- **Restricted Stock**
- **Stated**
- **Two Year Alt Doc**
- **Two Year 1099**
- **Written VOE**