

To Update Profile Information

You can update your profile, change your password, specify or change a recovery question and answer (if required), and verify license information through the Profile light box. Your profile was created during the initial user configuration by the system administrator.

To update your profile information:

- Log in to Path. The opening page you see will usually be the Pipeline view of your default role.
- Click your name in the header, highlighted in red in the above screen shot. The Profile light box appears.

Loans

Path User (Loan Originator) | Log out

Pipeline	Sandbox	Reports	Trades
Desk	Cabinet	Role Desk	Role Cabinet
Active	Archive	Inactive	

Production (1)	Lock (8)	Compliance (8)	Condition (2)	All
<input type="checkbox"/> A. ETA Date	Note Rate	Lock Expir...	Loan Type	Loan Status
	0.000		Application ...	Refinance
			8175550083	0.00 Bowen Zhao
			Ben M. Cars...	Bowen 1111... CA

Profile

My Profile

My Notification

User ID

pathuser

New Password

Email

path_user@calyxsoftware.com

Password

.....

Confirm Password

Phone

(408) 997-5525

Default Role

BZ Loan Originator

Last Login

Fax

Recovery Question

Favorite food?

Recovery Answer

Rib-eye steak

NMLS Number

4422

Issue Date

12/28/2018

Expiration Date

12/31/2019

State/Agency	License Number	Issue Date	Expiration Date
AZ AREC		12/27/2018	
CA CalBRE		12/27/2018	

Clear

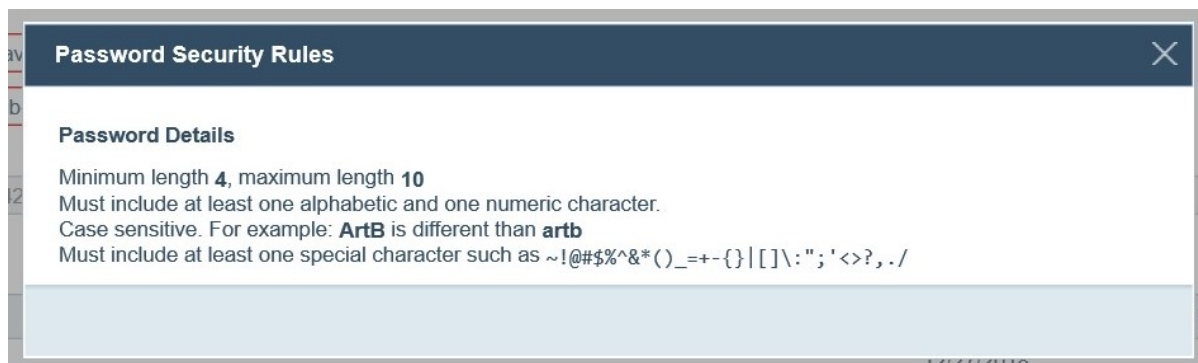
Save

- Review the information the first time you access your profile to ensure that it is accurate. If any information in the NMLS and license fields requires updating, contact your Path system administrator to request the change.

To Change Your Password

Enter your new password in the **New Password** field and enter it again in the **Confirm Password** field.

- To view the requirements for the password, click the information icon (i) next to the **New Password** field, to open the Password Security Rules light box.



- If your system administrator has configured Path to require users to answer a recovery question to verify your identity, the **Recovery Question** and **Recovery Answer** fields are visible. Enter a recovery question and provide the answer.

TIP: Your recovery question and answer do not need to be in the form of a question and answer. You can enter any word or phrase in the **Recovery Question** field as reminder of your **Recovery Answer**.

IMPORTANT: If you do not remember your recovery answer when you attempt to reset your password, contact your system administrator. The system administrator will reset the fields so you can enter them again.

- Update your email, phone, and fax, as applicable, in the **Email**, **Phone** and **Fax** fields.
- Click **Save** when finished.