Path Service Pack Release Notes

February 2022

This Path service pack update is scheduled for production release on February 6, 2022, including the following feature updates and enhancements. The actual feature updates and enhancements may be subject to change based on testing, development, and other factors that occur before the release date.

Updates and Enhancements

Documents

- Enhanced the user-interface experience of the documents table on the Document List screen.
    - When the user adjusts a column's width, it will remain at that width, even after the screen is closed and reopened, until the user adjusts it again.
    - When the user sorts the table by clicking a column's header, the sorting will remain that way, even after the screen is closed and reopened, until the user sorts the table again by clicking a different column's header.
    - When the user removes a column from the table, it will remain removed, even after the screen is closed and reopened, until the user restores the column.
- The Send for Signature button is updated to the **eSign** button.
- Updated the Send Request lightbox and button to the **Document Request** lightbox and button. Furthermore, the field and button labels within the lightbox are updated as well, along with the lightboxes that are opened from this lightbox.
    - Changed the Create button to the **Add** button, to better reflect the nature of the action.
        - Click this button to open the **New Document Request** lightbox (previously named Add Document Request). The fields and functions remain the same.
    - Changed the Pick button to the **Template** button, to better reflects the button's intent, which is to allow the user to select from a list of preselected document requests, which were set up in Settings.
        - Click this button to open the **Document Request Template** lightbox (previously named Document Request Pick List).

        - Updated the Save button to the **Add** button. Previously the user had to select the checkbox of the document request, then click the Save button, and then click the Close button. Now the user only needs to select the checkbox and click the Add button.
    - Updated the Documents table to **Document Request(s) to Be Sent**, to better reflect what the documents listed in the table are meant for.
    - Removed the Requested button and the Requested Document lightbox.
- Enhanced the Edit Document Request lightbox (when it is opened from the Document List screen).
    - Added the **Email** field, to give the user more flexibility regarding the recipient of the document request.
    - Added the **Cancel Request** button.
    - Added the **Upload Document** button, which is used when the user has the document (from the document request) and wishes to upload the document to Path. (A scenario where this is used is when the user has received the document in question, but through other means than the official document request via Path.)
    - Adding the **Resend** button, which is used when the document request needs to be sent again.
- Updated the verbiage for document request statuses by changing:
    - Document Request Created to **Document Request Added**.
    - Document Requested to **Document Request Sent**.

Conditions

- Updated the Condition Details lightbox by:
    - Enhancing the Add Document From lightbox (opened by clicking from the Documents table), by adding the **Document Request for Borrower** option, for attaching document requests to conditions.
        - When this option is selected, the new **Document Request** lightbox is opened, which has the same functions and buttons as the corresponding lightbox from Documents, such as:
            - Creating new document requests (**Add** button).
            - Selecting document requests from the list of templates set up in Settings (**Template** button).
    - Removing the Document Request checkbox, which was made redundant by the above enhancement.
- Enhanced the Edit Document Request lightbox (opened from the Condition Details lightbox) by:
    - Adding the **Email** field, to give the user more flexibility regarding the recipient of the document request.
    - Adding the **Cancel Request** button.
    - Adding the **Upload Document** button, which is used when the user has the document in question (from the document request) and wishes to upload the document to Path.

  - Adding the **Resend** button, which is used when the document request needs to be sent again.
- Updated the verbiage for document request statuses by changing:
  - Document Request Created to **Document Request Added**.
  - Document Requested to **Document Request Sent**.

Loan and User

- Any user with access to Trades can see and select trades in the Loan Selection lightbox on the Trade Detail screen.
- The Cabinet button is now correctly displayed or hidden, according to how it is configured to display or hide, based on what the loan status is.

Forms

- Updated the 4506C form by adding the checkbox that confirms the borrower has the authority to eSign the document.
- Updated the form VA Counseling Checklist for Military Homebuyers to the new version.
- The Conditional Loan Approval Notice form is now printing correctly, where the conditions are not overlapping.
- On the new 1008 form, when Rental Income – subject property is a negative amount, it is now added to All Other Monthly Payments Used in Qualifying.

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