

## P.A.T.H. Administrator Guide – Manage Broker Users

Functionality in P.A.T.H. is controlled by assigning associates to a specific role or roles that limit access to specific screens. **Assigning more than one (1) role allows the user access to multiple job functions.**

**Example** – The roles of Wholesale Processor & Wholesale Secondary give access to all job functions except for managing portal access, setting compensation, and Purchase Advice screens.

### P.A.T.H. Access Roles

Role	Permissions
<b>Wholesale Portal Administrator</b>	<ul style="list-style-type: none"> <li>• <b>Includes permissions for ALL roles and screens.</b></li> <li>• Manages Broker user profiles.</li> <li>• Update passwords.</li> <li>• Set Compensation (Not applicable to Branch Portal Administrator).</li> <li>• Alerts &amp; Notification Management.</li> </ul>
<b>Wholesale Manager</b>	<ul style="list-style-type: none"> <li>• <b>Includes permissions for all roles and screens, except for managing Broker user profiles.</b></li> <li>• Set Compensation (Not applicable to Branch Wholesale Manager).</li> <li>• Alerts &amp; Notification Management.</li> </ul>
<b>Wholesale Processor</b>	<ul style="list-style-type: none"> <li>• Includes permissions for all roles and screens.</li> <li>• Ability to manage pipeline view by loan officer profile.</li> <li>• Alerts &amp; Notification Management.</li> </ul> <p><b>Cannot:</b></p> <ul style="list-style-type: none"> <li>• View, lock loans, or manage locks (unless also given Secondary role).</li> <li>• Price loans using Generate Pricing Scenario.</li> </ul>
<b>Wholesale Loan Officer</b>	<p>Can:</p> <ul style="list-style-type: none"> <li>• Limited loan access available.</li> <li>• Import and enter new loans.</li> <li>• Review Conditions and upload documents.</li> <li>• Submit Change of Circumstance and FHA Change Requests.</li> <li>• Enter and edit loan information.</li> </ul> <p><b>Cannot:</b></p> <ul style="list-style-type: none"> <li>• View, Lock, or manage locks (unless also given Secondary role).</li> <li>• Enter or Edit Fees &amp; Closing Costs, Submit Loan, Request Loan Closing.</li> <li>• Price loans using Generate Pricing Scenario.</li> </ul>
<b>Wholesale Secondary</b>	<p>Can:</p> <ul style="list-style-type: none"> <li>• Lock loans and manage locks.</li> <li>• Generate Pricing Scenarios.</li> </ul>
<b>Wholesale Purchase Advice</b> <b>(For Emerging Banker Only)</b>	<p>Can:</p> <ul style="list-style-type: none"> <li>• View and download Purchase Advice.</li> <li>• Lock loans and manage locks.</li> <li>• Generate Pricing Scenarios.</li> </ul>

## P.A.T.H. Access Roles - Continued

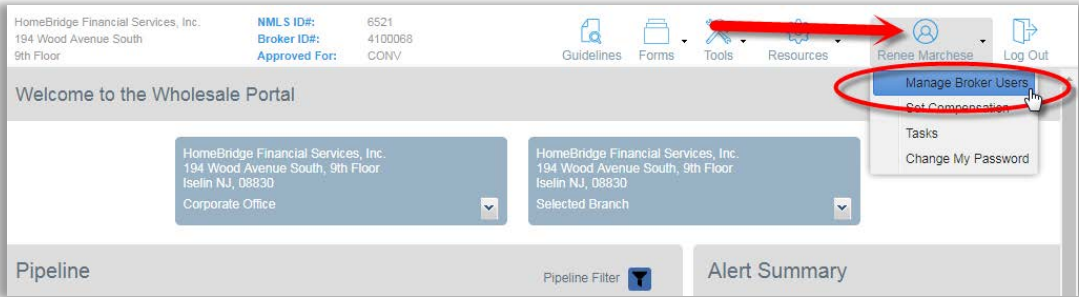
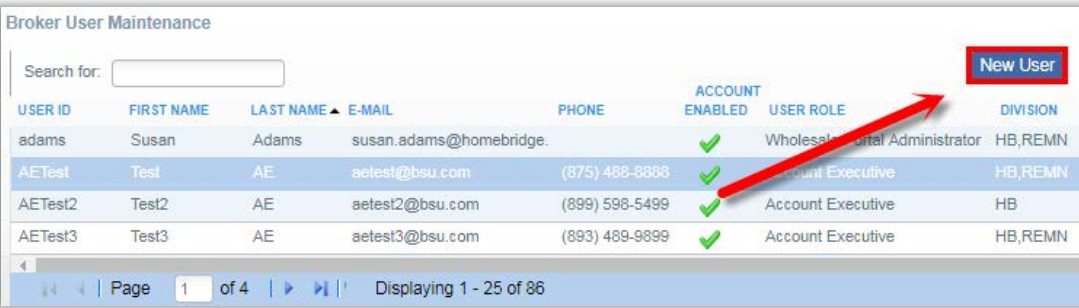
<p><b>Wholesale Underwriter</b></p>	<p>Can:</p> <ul style="list-style-type: none"> <li>• Review Conditions and upload documents.</li> <li>• Submit Change of Circumstance and FHA Change Requests.</li> </ul> <p>Cannot:</p> <ul style="list-style-type: none"> <li>• View, Lock loans or manage locks (unless also given Secondary role).</li> <li>• Enter or Edit Fees &amp; Closing Costs</li> </ul> <p>All other access is Read-Only.</p>
<p><b>Wholesale Closer</b></p>	<p>Can:</p> <ul style="list-style-type: none"> <li>• Enter and edit Fees &amp; Closing Costs.</li> <li>• Request CD and schedule closing.</li> </ul> <p>Cannot:</p> <ul style="list-style-type: none"> <li>• View, Lock loans or manage locks (unless also given Secondary role).</li> <li>• Enter or Edit Fees &amp; Closing Costs</li> </ul>
<p><b>Wholesale Associate</b></p>	<p>Can:</p> <ul style="list-style-type: none"> <li>• Import and enter loans.</li> <li>• Enter and edit loan information.</li> </ul> <p>Cannot:</p> <ul style="list-style-type: none"> <li>• View, Lock loans or manage locks (unless also given Secondary role).</li> <li>• Enter or Edit Fees &amp; Closing Costs</li> </ul>
<p><b>Wholesale Setup</b></p>	<p>Can:</p> <p>Submit loans to Homebridge Wholesale.</p> <p>Cannot:</p> <ul style="list-style-type: none"> <li>• View, Lock loans or manage locks (unless also given Secondary role).</li> <li>• Enter or Edit Fees &amp; Closing Costs</li> </ul>

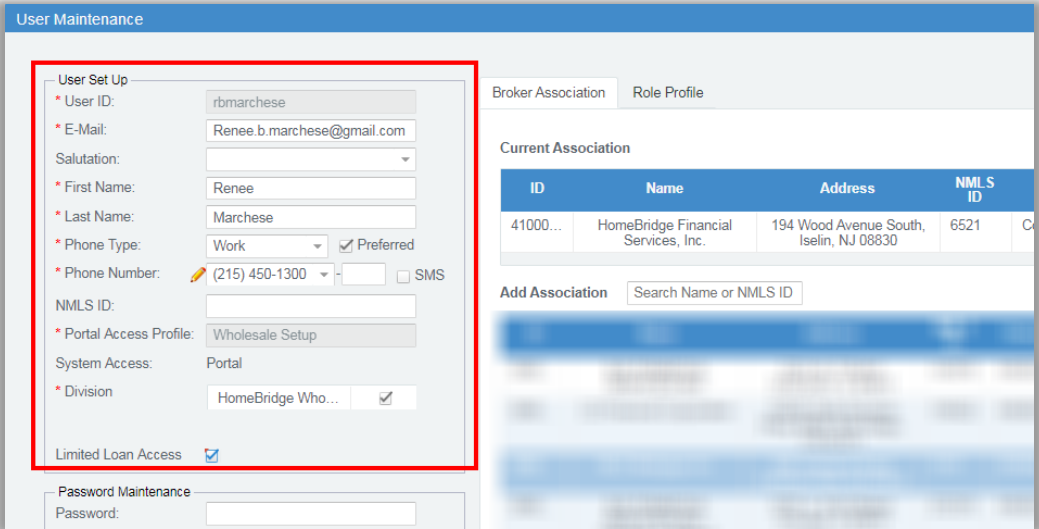
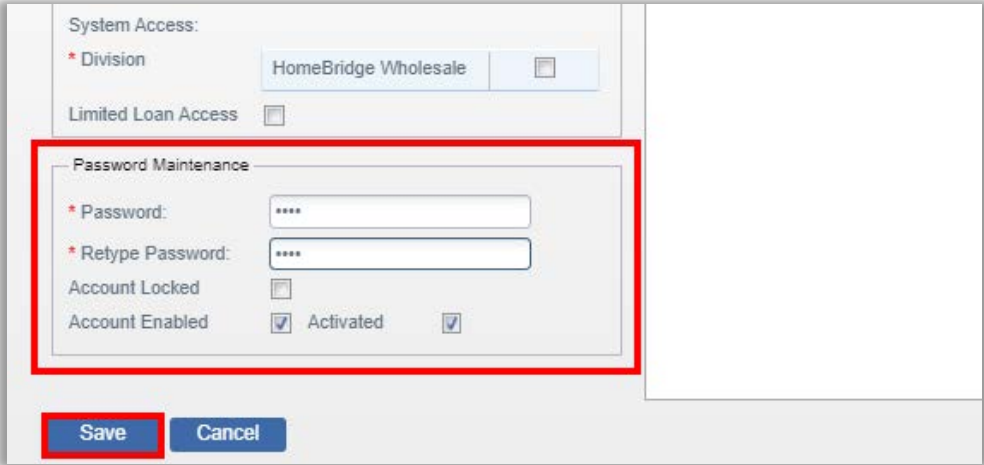
## Activate an Existing Profile


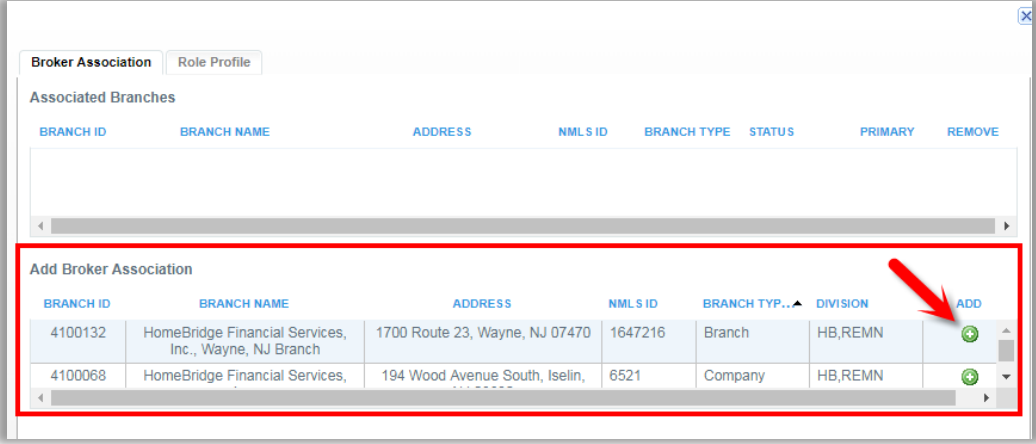
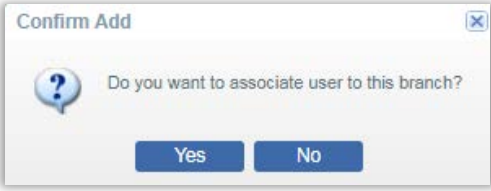
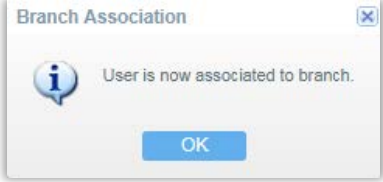
Users that had access to the old Broker Portal but never validated their PATH profile –

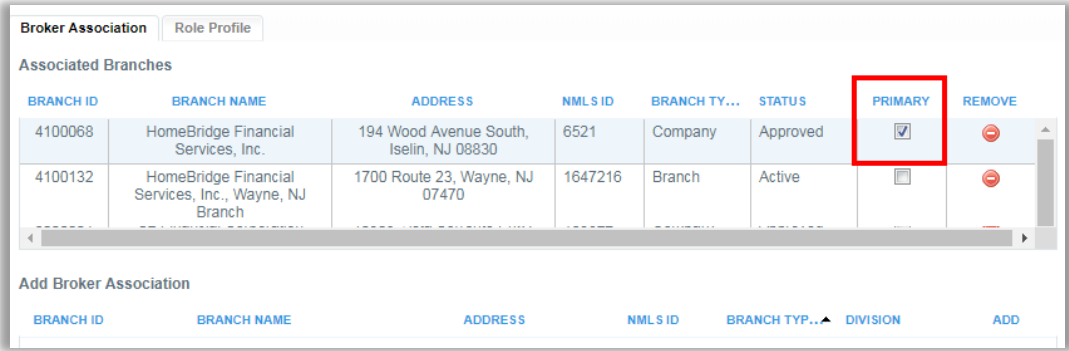

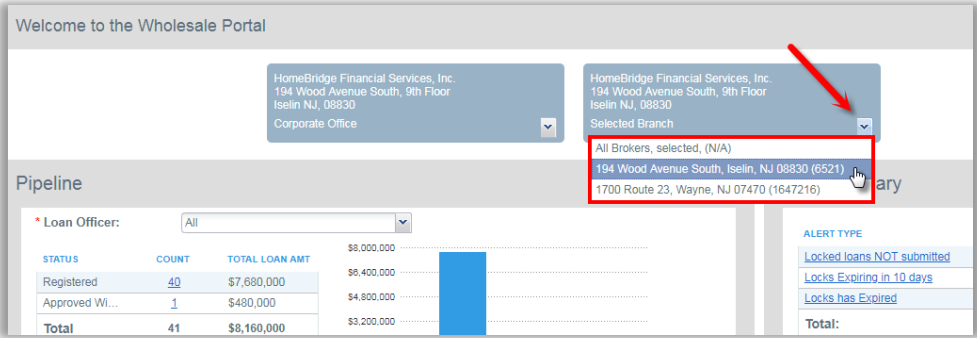
1. Provide the **P.A.T.H. Initial Log In Instructions** guide to assist with the new user 2-step validation process  
 – or –
2. Click [here](#) and enter the user’s email address to send email instructions to complete the 2-step validation process.

## Add a New User

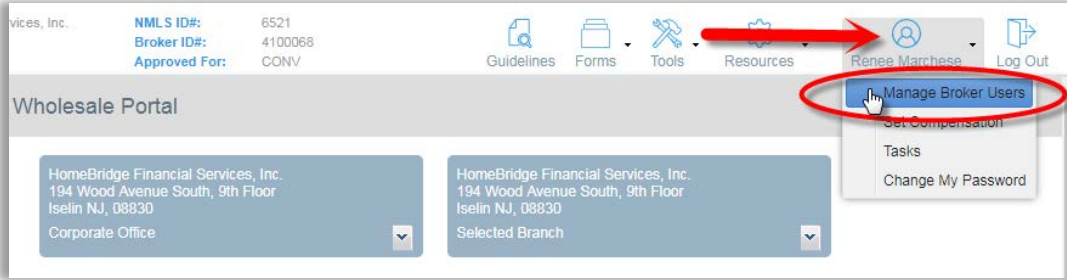
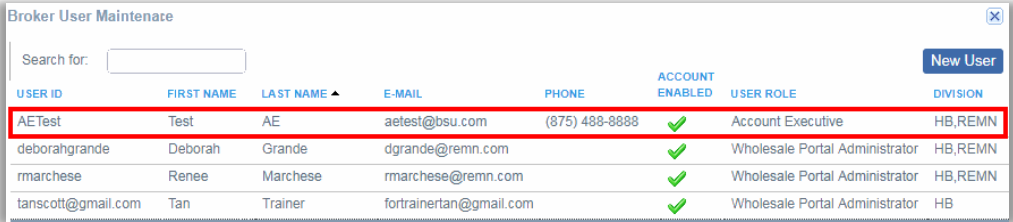

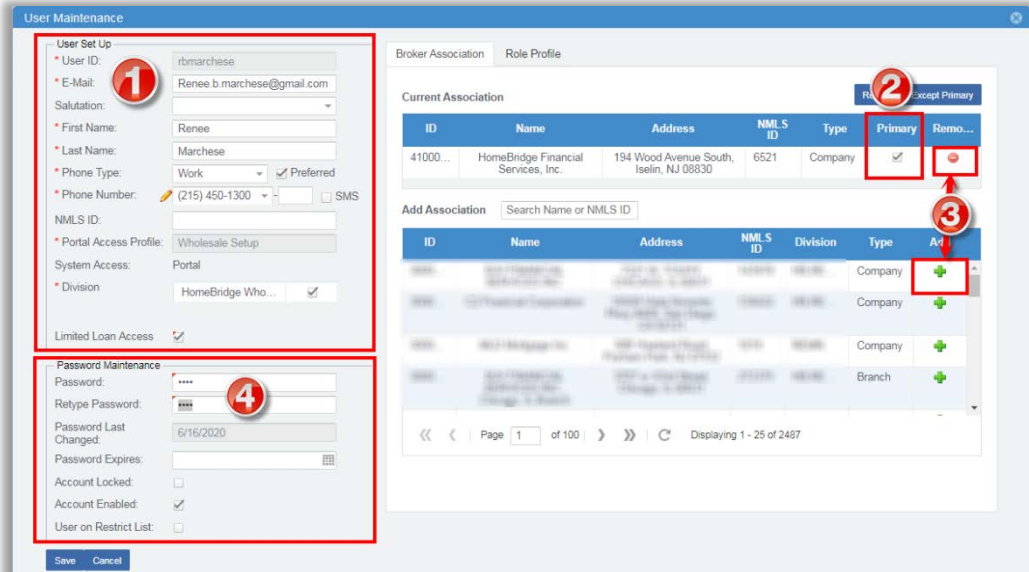
Step	Action																																								
1	<p>Click the user icon with your name and select <b>Manage Broker Users</b>.</p> 																																								
2	<p>The Broker User Maintenance screen displays all current users. Click the <b>New User</b> button.</p>  <table border="1" data-bbox="365 1333 1437 1522"> <thead> <tr> <th>USER ID</th> <th>FIRST NAME</th> <th>LAST NAME</th> <th>E-MAIL</th> <th>PHONE</th> <th>ACCOUNT ENABLED</th> <th>USER ROLE</th> <th>DIVISION</th> </tr> </thead> <tbody> <tr> <td>adams</td> <td>Susan</td> <td>Adams</td> <td>susan.adams@homebridge.</td> <td></td> <td>✓</td> <td>Wholesale Portal Administrator</td> <td>HB,REMN</td> </tr> <tr> <td>AETest</td> <td>Test</td> <td>AE</td> <td>aetest@bsu.com</td> <td>(875) 488-8868</td> <td>✓</td> <td>Account Executive</td> <td>HB,REMN</td> </tr> <tr> <td>AETest2</td> <td>Test2</td> <td>AE</td> <td>aetest2@bsu.com</td> <td>(899) 598-5499</td> <td>✓</td> <td>Account Executive</td> <td>HB</td> </tr> <tr> <td>AETest3</td> <td>Test3</td> <td>AE</td> <td>aetest3@bsu.com</td> <td>(893) 489-9899</td> <td>✓</td> <td>Account Executive</td> <td>HB,REMN</td> </tr> </tbody> </table>	USER ID	FIRST NAME	LAST NAME	E-MAIL	PHONE	ACCOUNT ENABLED	USER ROLE	DIVISION	adams	Susan	Adams	susan.adams@homebridge.		✓	Wholesale Portal Administrator	HB,REMN	AETest	Test	AE	aetest@bsu.com	(875) 488-8868	✓	Account Executive	HB,REMN	AETest2	Test2	AE	aetest2@bsu.com	(899) 598-5499	✓	Account Executive	HB	AETest3	Test3	AE	aetest3@bsu.com	(893) 489-9899	✓	Account Executive	HB,REMN
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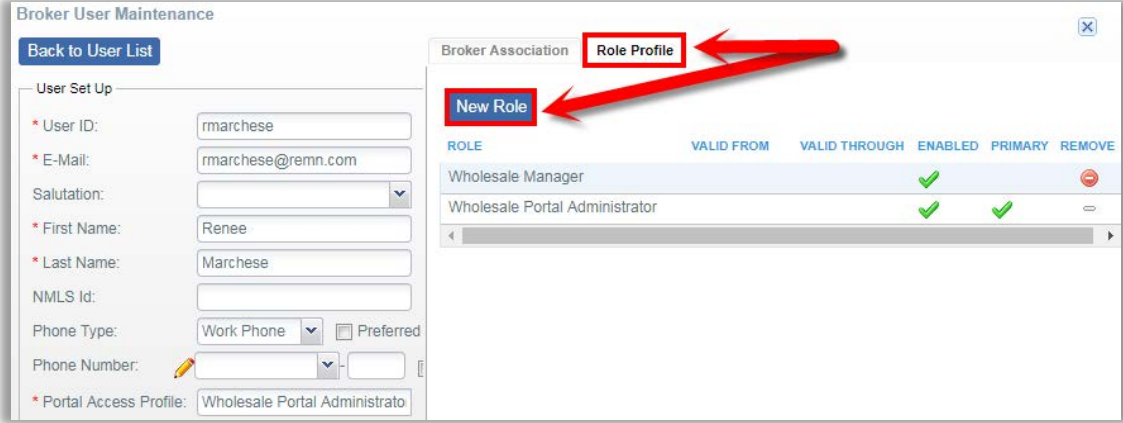
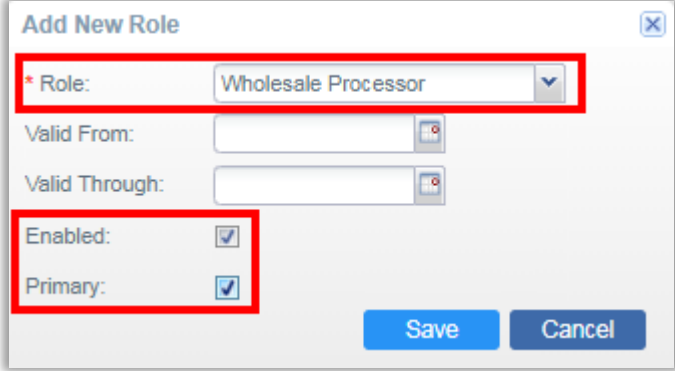
Step	Action
<p style="text-align: center; font-size: 24pt; font-weight: bold;">3</p>	<p>Enter the <b>User Set Up</b> information.</p>  <p><b>Helpful Tips:</b></p> <ul style="list-style-type: none"> <li>• Choose an easy <b>User ID</b> such an email address (between 5-20 characters) to limit future inquiries.</li> <li>• Select <b>Limited Loan Access</b> for LO only pipeline view.</li> </ul>
<p style="text-align: center; font-size: 24pt; font-weight: bold;">4</p>	<p>Enter HBWS for the password.</p> <p><b>Note: PATH user will not need this password as the email activation notice will include a temporary password.</b></p> 

Step	Action
5	<ul style="list-style-type: none"> <li>Broker companies with only one (1) branch will automatically be associated with new users.</li> <li>For Brokers with <b>more</b> than one (1) branch-Click the Add button  to associate the new user with a Branch or Branches.</li> </ul> 
6	<p>Confirm the branch association and click <b>OK</b>.</p>   <p><b>Note:</b> Broker companies with only one (1) branch will need to confirm the branch association upon Save.</p>

Step	Action
	<p>If the user is associated with more than one (1) branch, select the <b>Primary</b> branch to display on the user's Home Screen.</p> 
7	<p> <b>Helpful Tip:</b> Users associated with more than one branch can view information for each branch on the home screen by selecting the desired branch from the dropdown.</p> 


## Edit User Profiles

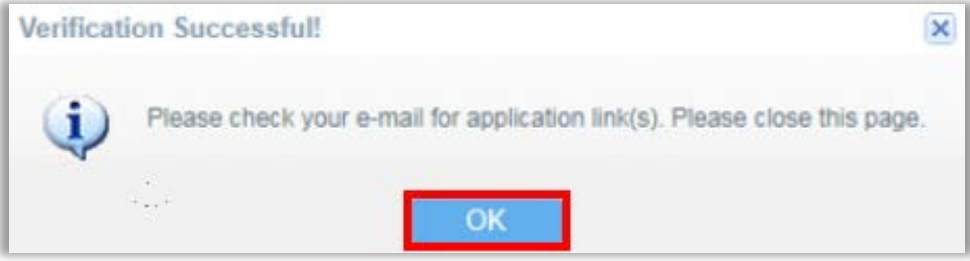
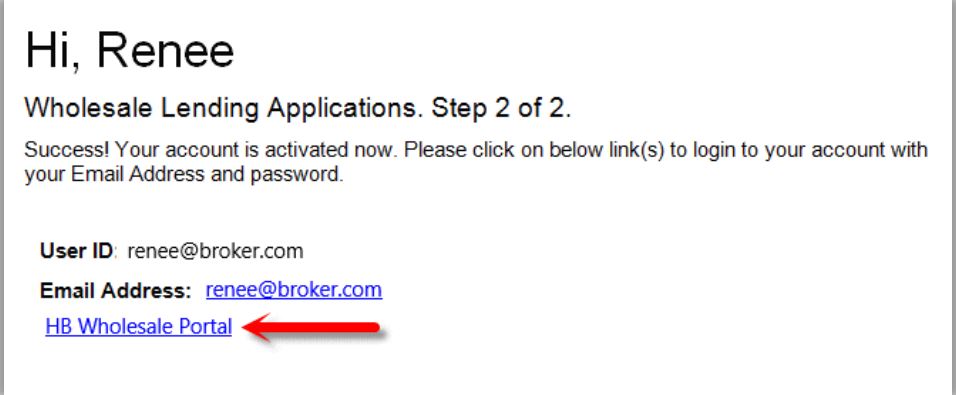
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1	<p>Click the user icon with your name and select <b>Manage Broker Users</b>.</p> 																																								
2	<p>The Pop up will display a full list of company users with access to the new Portal. Double click a user to edit.</p>  <table border="1" data-bbox="397 798 1404 1018"> <thead> <tr> <th>USER ID</th> <th>FIRST NAME</th> <th>LAST NAME</th> <th>E-MAIL</th> <th>PHONE</th> <th>ACCOUNT ENABLED</th> <th>USER ROLE</th> <th>DIVISION</th> </tr> </thead> <tbody> <tr> <td>AETest</td> <td>Test</td> <td>AE</td> <td>aetest@bsu.com</td> <td>(875) 488-8888</td> <td>✓</td> <td>Account Executive</td> <td>HB,REMN</td> </tr> <tr> <td>deborahgrande</td> <td>Deborah</td> <td>Grande</td> <td>dgrande@remn.com</td> <td></td> <td>✓</td> <td>Wholesale Portal Administrator</td> <td>HB,REMN</td> </tr> <tr> <td>rmarchese</td> <td>Renee</td> <td>Marchese</td> <td>rmarchese@remn.com</td> <td></td> <td>✓</td> <td>Wholesale Portal Administrator</td> <td>HB,REMN</td> </tr> <tr> <td>tanscott@gmail.com</td> <td>Tan</td> <td>Trainer</td> <td>fortrainertan@gmail.com</td> <td></td> <td>✓</td> <td>Wholesale Portal Administrator</td> <td>HB</td> </tr> </tbody> </table>	USER ID	FIRST NAME	LAST NAME	E-MAIL	PHONE	ACCOUNT ENABLED	USER ROLE	DIVISION	AETest	Test	AE	aetest@bsu.com	(875) 488-8888	✓	Account Executive	HB,REMN	deborahgrande	Deborah	Grande	dgrande@remn.com		✓	Wholesale Portal Administrator	HB,REMN	rmarchese	Renee	Marchese	rmarchese@remn.com		✓	Wholesale Portal Administrator	HB,REMN	tanscott@gmail.com	Tan	Trainer	fortrainertan@gmail.com		✓	Wholesale Portal Administrator	HB
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deborahgrande	Deborah	Grande	dgrande@remn.com		✓	Wholesale Portal Administrator	HB,REMN																																		
rmarchese	Renee	Marchese	rmarchese@remn.com		✓	Wholesale Portal Administrator	HB,REMN																																		
tanscott@gmail.com	Tan	Trainer	fortrainertan@gmail.com		✓	Wholesale Portal Administrator	HB																																		
3	<p>The user's current settings will display. Update the information as necessary.</p> <ol style="list-style-type: none"> <li>Update User ID, E-Mail, Name, select Division, Limit Loan Access, etc. <ul style="list-style-type: none"> <li>To add Phone Number click the .</li> </ul> </li> <li>Update the Primary Branch.</li> <li>Add or Remove access to specific branches of your company.</li> <li>Enter and confirm a Password (required field that doesn't not need to be given to the user, Lock/Unlock the Account.</li> </ol> 																																								

Step	Action
4	<p>To change or add an additional role for a user:</p> <ul style="list-style-type: none"> <li>Click the <b>Role Profile</b> tab.</li> <li>Click the <b>New Role</b> button.</li> </ul> 
5	<p>Complete the <b>Add New Role</b> pop up:</p> <ul style="list-style-type: none"> <li>Select the new <b>Role</b> to be applied (See the <a href="#">P.A.T.H. Access Roles</a> section for details)</li> <li>Place a checkmark to <b>Enable</b> the new Role.</li> <li>Place a checkmark if the new Role is the <b>Primary Role</b>.</li> <li>Click <b>Save</b>.</li> </ul>  <p><b>Notes:</b> Enter the <b>Valid From</b> and <b>Valid Through</b> dates to give temporary access to the system.</p>



## New User 2-Step Validation

Step	Action
1	<p>A <b>Welcome to Wholesale Portal</b> email will be sent to the address provided in user setup.</p> <p>Take note of your temporary password and click the <b>Password Authentication</b> link.</p> <div data-bbox="415 474 1386 844" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Hi, Renee</p> <p>User Activation Email. Step 1 of 2.</p> <p>Please click on the "Password Authentication" link to activate your account.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Email Address:</b> renee@broker.com</p> <p><b>Temporary Password:</b> WMT87N</p> <p><a href="#">Password Authentication</a> ←</p> </div> </div>
2	<p>A verification pop-up will appear. Enter all required fields and click <b>Update</b>.</p> <div data-bbox="571 957 1230 1423" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>Verification</b></p> <p>* Email Address: <input type="text" value="renee@broker.com"/></p> <p>* Temporary Password: <input type="password" value="*****"/></p> <p>* New Password: <input type="password" value="*****"/></p> <p>* Verify New Password: <input type="password" value="*****"/></p> <p>— <input type="checkbox"/> <b>Password Requirements:</b> _____</p> <p style="text-align: center;"><a href="#">Forgot Temporary Password</a></p> <p style="text-align: center;"><input type="button" value="Update"/></p> </div> <p> <b>Password Requirements:</b></p> <ul style="list-style-type: none"> <li>✓ MUST contain at least 8 characters</li> <li>✓ MUST contain at least one uppercase letter</li> <li>✓ MUST contain at least one lowercase letter</li> <li>✓ MUST contain at least one number</li> <li>✓ MUST contain at least one special character</li> </ul>

Step	Action
3	<p>A Verification Successful pop up will appear. Click <b>OK</b> and return to your email account.</p>  A screenshot of a 'Verification Successful!' dialog box. The dialog has a title bar with a close button (X). Below the title is an information icon (i) and the text: 'Please check your e-mail for application link(s). Please close this page.' At the bottom center, there is a blue 'OK' button with a red rectangular border around it.
4	<p>You will receive another email with your <b>user ID</b> and the link to the new portal. Click the link to access.</p>  A screenshot of an email body. It starts with 'Hi, Renee' in a large font. Below that is 'Wholesale Lending Applications. Step 2 of 2.' followed by 'Success! Your account is activated now. Please click on below link(s) to login to your account with your Email Address and password.' Then it lists 'User ID: renee@broker.com' and 'Email Address: renee@broker.com'. At the bottom, there is a blue underlined link 'HB Wholesale Portal' with a red arrow pointing to it from the right.