



A division of Homebridge Financial Services, Inc.

P.A.T.H. Release Notes

Release 25

September 22, 2023

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1. Banner – Broker Status

The P.A.T.H. banner has been updated to display the current Broker Status.

The screenshot shows the P.A.T.H. banner for HomeBridge Financial Services, Inc. The banner includes the following information:

- HomeBridge Financial Services, Inc.
194 Wood Avenue South
9th Floor
- NMLS ID#: 6521
Broker ID#: 4100068
Approved For: CONV
- Broker Status: Approved** (highlighted with a red box)

Below the banner, there is a "Welcome to the Wholesale Portal" message and a "Pipeline" section. The Pipeline section includes a dropdown menu for "Loan Officer:" set to "All" and a "Pipeline Filter" button.

2. Loan Summary – Short Application – Contact Details

Brokers can now enter or edit a Borrower's Email or Phone information directly from the Short Application with the **Contact Details** buttons.

The screenshot shows the "Borrower Contact Details" dialog box overlaid on the "Borrower Information" form. The dialog box contains the following fields:

- Contact Email Info:** Home (dropdown), andy.a@fanniemae.com (text), Prefer (radio button).
- Contact Phone Info:** Home Phone: (508) 888-8888 (text), Mobile Phone: (215) 555-1212 (text), Work Phone: (999) 999-9999 (text), Ext: (text), Prefer (radio button).

The "Contact Details" buttons on the "Borrower Information" form are highlighted with a red box. The dialog box has "OK" and "Cancel" buttons at the bottom right.

3. Loan Summary - Contacts

Brokers now have the ability to delete a Broker Contact from a loan.

The screenshot displays a web interface for managing contacts. It is divided into two main sections: 'Lender Account Management' and 'Broker Account Management'.
Under 'Lender Account Management', there is a table with columns: CONTACT ROLE, CONTACT NAME, EMAIL, and PHONE #. It lists 'Account Executive' and 'Internal Loan Contact / AE Assist...'.
Under 'Broker Account Management', there is a table with columns: CONTACT ROLE, CONTACT NAME, EMAIL, PHONE #, and URL.
Below the tables is the 'Broker Contact Info' section, which contains two contact forms: 'Contact 1' and 'Contact 2'. Each form has a 'Set' button and a 'Delete' button. The 'Delete' buttons for both Contact 1 and Contact 2 are highlighted with red boxes. Contact 1 fields include 'Test Proc2', '(872) 378-2387', and 'tp2@bsu.com'. Contact 2 fields include 'HB Admin', '(888) 888-8888', and 'hbadmin@bsu.com'.

Note: If Contact 1 is deleted, the information from Contact 2 will populate as Contact 1.

4. Loan Processing - Order Appraisals

When ordering appraisals through P.A.T.H., the most common Product Types are now at the top of the dropdown list.

The screenshot shows the 'Appraisal Vendor Service' form. It includes fields for 'Request Type' (set to 'New Order'), 'Service Provider' (set to 'Class Valuation'), and 'Product Type'. The 'Product Type' dropdown is open, showing a list of options. The top five options are highlighted with a red box: '1004 - Single Family', '1004 - Single Family Investment (1007 Only)', '1004 - Single Family Investment (1007 + 216)', '1004 - Single Family with Complex Prop', and '1004 - Single Family Investment (1007 + 216) (Complex Property)'. Other options include '1004 - Desktop Appraisal (Complex Property)', '1004 - Hybrid Appraisal', '1004C - Manufactured Home', '1004C - Manufactured Home Investment (1007 Only)', '1004C - Manufactured Home Investment (1007 + 216)', '1004C - Manufactured Home (Complex Property)', '1004C - Manufactured Home Investment (1007 + 216) (Complex Property)', and '1004D - Appraisal Update'. The 'Submit Order' button is located at the bottom right of the form.

5. Loan Processing - Fees & Closing Costs

To make it easier for Brokers to preview LE's and CD's, the Fees & Closing Costs screen has been updated with new buttons for viewing the Loan Estimate and/or the Closing Disclosure.

Lender Loan Number: 2400007236	Lock Expiration: 10/2/2023	Loan Status: Submitted to Setup	Loan Purpose: Refinance	Total Loan Amount: \$400,000.00
		Borrower Name: Customer, Ken N. JR	Product: Conv Conforming 30 yr Fixed	Loan Amount: \$400,000.00
		Subject Property: 10655 Birch St Sherman, TX 75090	Interest Rate: 6.375%	Program: Texas Home Eq
		LTV/CLTV: 80.00% / 80.00%	Occupancy: Primary Residence	Ratios: 21.24% / 24.57%

Fees and Closing Costs

Credit for Rate Chosen:

[View Loan Estimate](#)
[View Closing Disclosure](#)

SECTION	DESCRIPTION	SERVICE PROVIDER	PAID TO	TOTAL AMOUNT	BORROWER AMO...	SELLER AMOUNT	FINANCE CHARG...	FEE MODI...	MANUAL ...
A	Broker Fees		Broker	\$4,000.00	\$4,000.00	\$0.00	\$4,000.00		
A	Origination Points		Lender	\$6,300.00	\$6,300.00	\$0.00	\$6,300.00		
A	Underwriting Fees		Lender	\$995.00	\$995.00	\$0.00	\$995.00		
B	Appraisal Fee		Third Party Prov...	\$700.00	\$700.00	\$0.00	\$0.00		