

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.

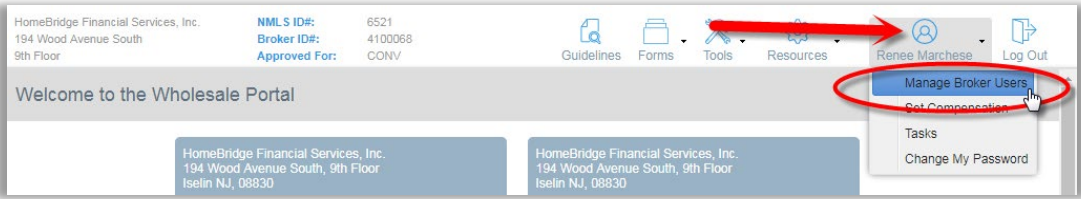
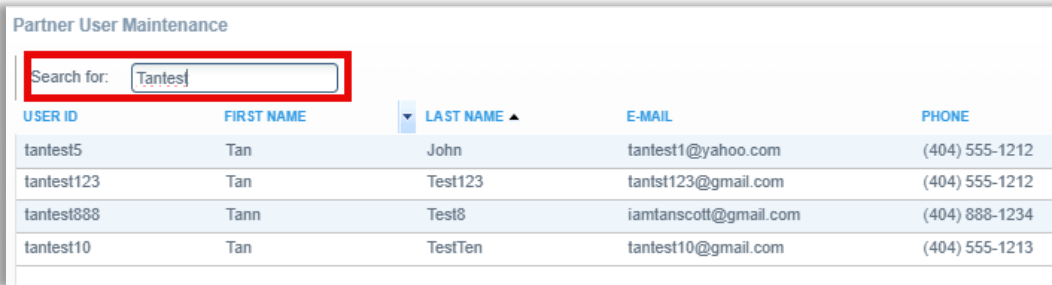
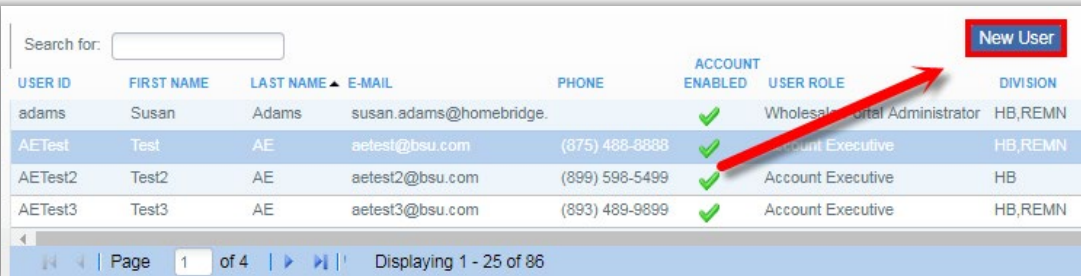
P.A.T.H. Access Roles

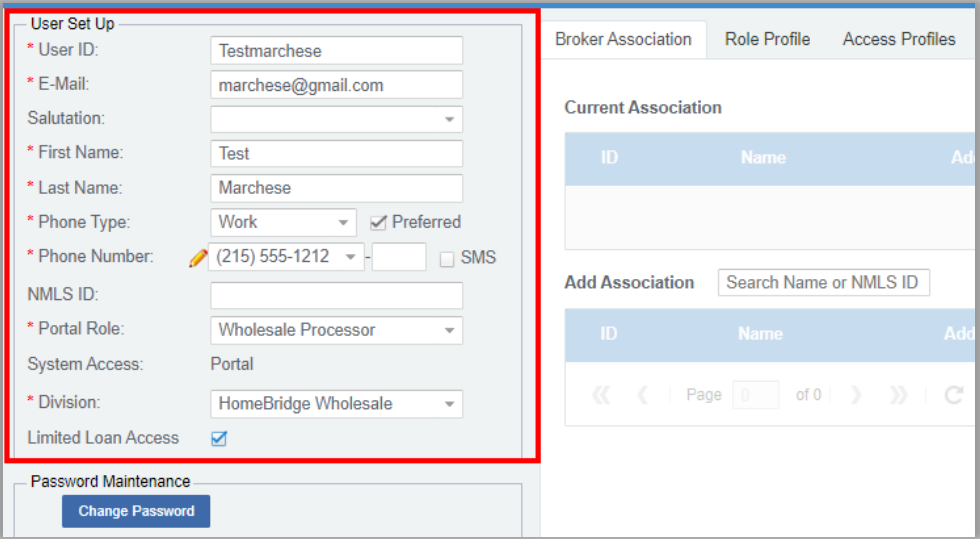

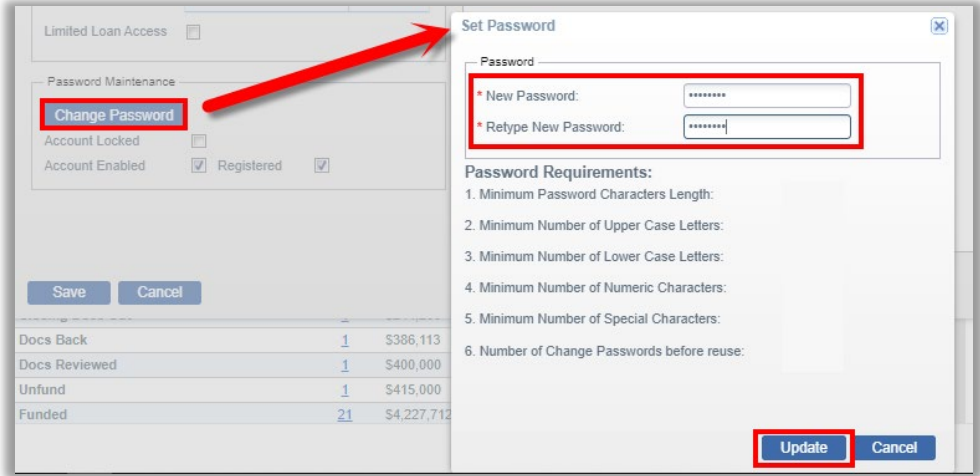
Role	Permissions
Wholesale Portal Administrator	<ul style="list-style-type: none"> • Includes permissions for ALL roles and screens. • Manages Broker user profiles. • Update passwords. • Set Compensation (Not applicable to Branch Portal Administrator). • Alerts & Notification Management.
Wholesale Manager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


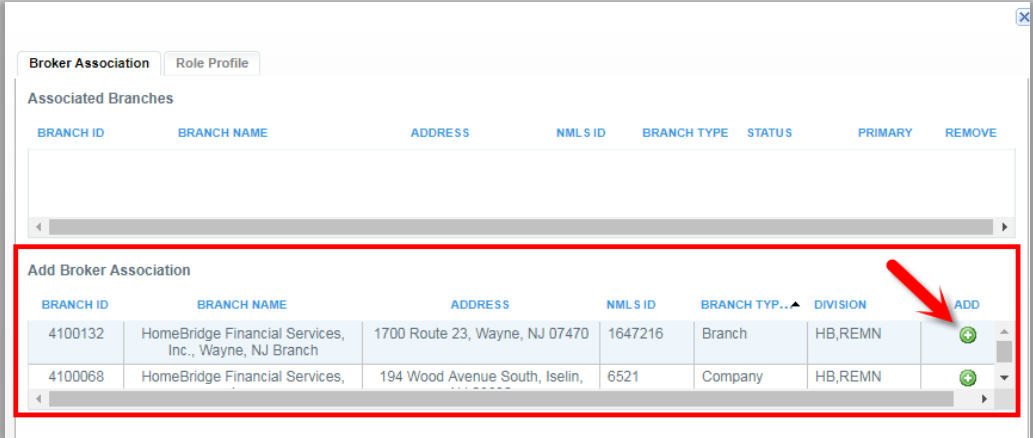
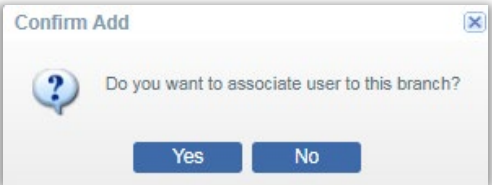
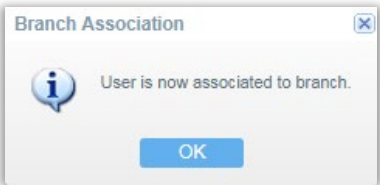
P.A.T.H. Access Roles - Continued


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

Add a New User

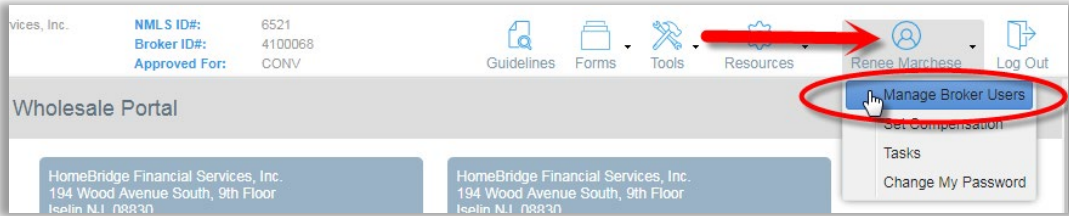
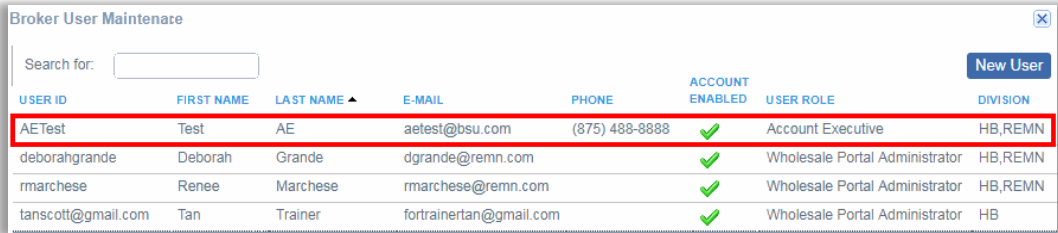



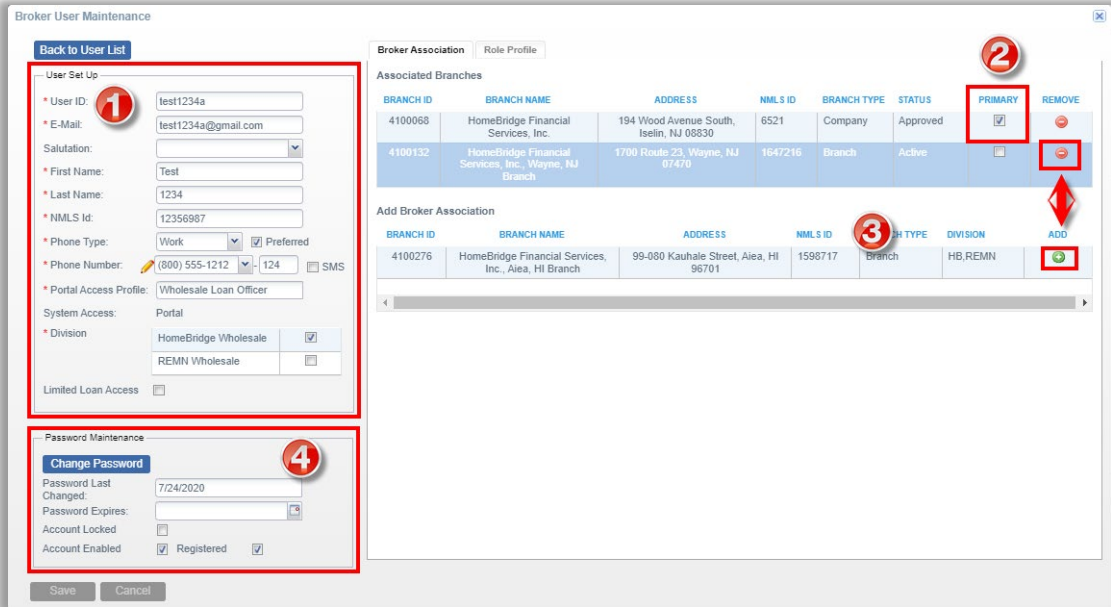
Step	Action
1	<p>Click the user icon with your name and select Manage Broker Users.</p> 
2	<p>The Partner User Maintenance screen displays all current users. To ensure there isn't an existing profile, search by MLO E-Mail address, First Name, or Last Name.</p> <ul style="list-style-type: none"> Type the new user's email address, first or last name in the Search bar. Click Enter on your keyboard to determine if the profile already exists.  <p>To view or edit existing user, double-click the profile. See the Edit User Profiles section for complete instructions.</p> <p>If the search does not return an existing user, click the New User button.</p> 

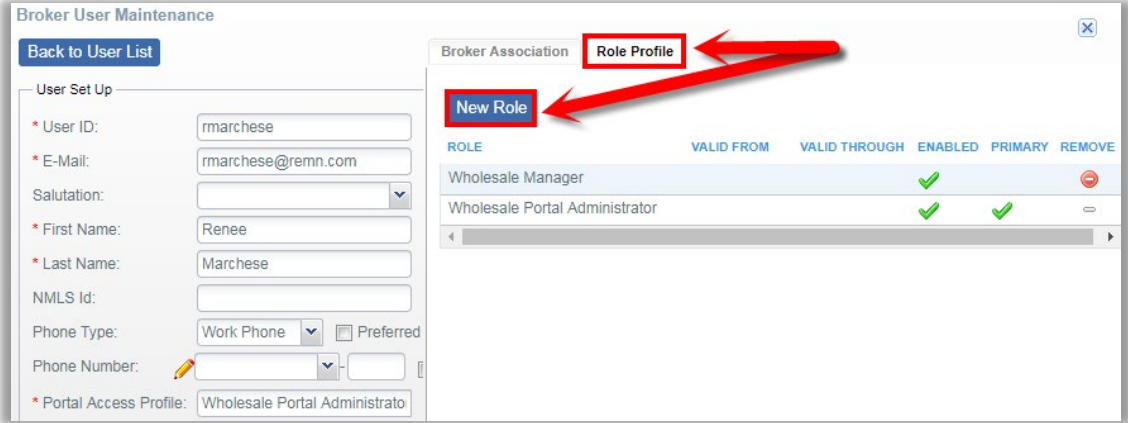
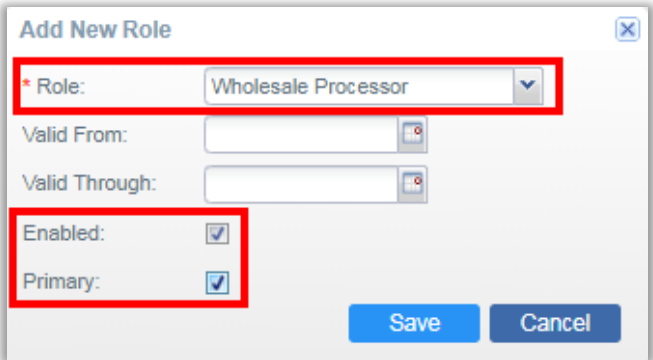
Step	Action
3	<p>Enter the User Set Up information.</p>  <p> Helpful Tips:</p> <ul style="list-style-type: none"> • Select the PATH Access Roles and select Division: Homebridge Wholesale. • Choose an easy User ID such an email address (between 5-20 characters) to limit future inquiries. • Select Limited Loan Access for LO only pipeline view.
4	<ul style="list-style-type: none"> • Click Change Password • Enter New Password: HBWSis#1 • Retype New Password: HBWSis#1 • Click Update • Click Save at the bottom of the screen <p>Note: P.A.T.H. user will not need this password as they will be prompted to create a password upon activation.</p> 

Step	Action
5	<ul style="list-style-type: none"> Broker companies with only one (1) branch will automatically be associated with new users. For Brokers with more than one (1) branch-Click the Add button  to associate the new user with a Branch or Branches. 
6	<p>Confirm the branch association and click OK.</p>   <p>Note: 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 Primary branch to display on the user's Home Screen.</p> <div><div><div>Broker Association</div><div>Role Profile</div></div><div><div>Associated Branches</div><table><thead><tr><th>BRANCH ID</th><th>BRANCH NAME</th><th>ADDRESS</th><th>NMLS ID</th><th>BRANCH TY...</th><th>STATUS</th><th>PRIMARY</th><th>REMOVE</th></tr></thead><tbody><tr><td>4100068</td><td>HomeBridge Financial Services, Inc.</td><td>194 Wood Avenue South, Iselin, NJ 08830</td><td>6521</td><td>Company</td><td>Approved</td><td><input checked="" type="checkbox"/></td><td></td></tr><tr><td>4100132</td><td>HomeBridge Financial Services, Inc., Wayne, NJ Branch</td><td>1700 Route 23, Wayne, NJ 07470</td><td>1647216</td><td>Branch</td><td>Active</td><td><input type="checkbox"/></td><td></td></tr></tbody></table></div><div><div>Add Broker Association</div><table><thead><tr><th>BRANCH ID</th><th>BRANCH NAME</th><th>ADDRESS</th><th>NMLS ID</th><th>BRANCH TYP...</th><th>DIVISION</th><th>ADD</th></tr></thead></table></div></div> <div><div>7</div><div><div>Helpful Tip: 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.</div></div></div> <div><div><div>Welcome to the Wholesale Portal</div><div><div>HomeBridge Financial Services, Inc. 194 Wood Avenue South, 9th Floor Iselin NJ, 08830 Corporate Office</div><div>HomeBridge Financial Services, Inc. 194 Wood Avenue South, 9th Floor Iselin NJ, 08830 Selected Branch</div></div><div><div>Pipeline</div><div><div>* Loan Officer:</div><div>All</div></div><table><thead><tr><th>STATUS</th><th>COUNT</th><th>TOTAL LOAN AMT</th></tr></thead><tbody><tr><td>Registered</td><td>40</td><td>\$7,680,000</td></tr><tr><td>Approved Wl...</td><td>1</td><td>\$480,000</td></tr><tr><td>Total</td><td>41</td><td>\$8,160,000</td></tr></tbody></table></div><div><div>ALERT TYPE</div><div><div>Locked loans NOT submitted</div><div>Locks Expiring in 10 days</div><div>Locks has Expired</div></div><div>Total:</div></div></div></div>	BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TY...	STATUS	PRIMARY	REMOVE	4100068	HomeBridge Financial Services, Inc.	194 Wood Avenue South, Iselin, NJ 08830	6521	Company	Approved	<input checked="" type="checkbox"/>		4100132	HomeBridge Financial Services, Inc., Wayne, NJ Branch	1700 Route 23, Wayne, NJ 07470	1647216	Branch	Active	<input type="checkbox"/>		BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYP...	DIVISION	ADD	STATUS	COUNT	TOTAL LOAN AMT	Registered	40	\$7,680,000	Approved Wl...	1	\$480,000	Total	41	\$8,160,000
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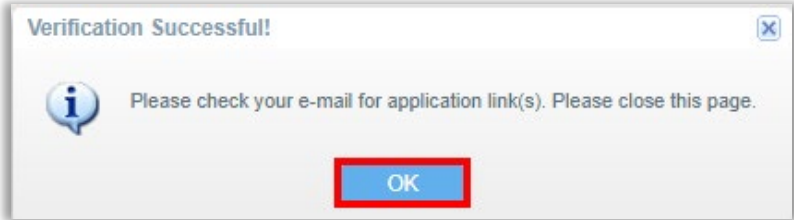
Edit User Profiles

Step	Action
1	<p>Click the user icon with your name and select Manage Broker Users.</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> 
3	<p>The user's current settings will display. Update the information as necessary.</p> <ol style="list-style-type: none"> Update User ID, E-Mail, Name, select Division, Limit Loan Access, etc. <ul style="list-style-type: none"> To add Phone Number click the . Update the Primary Branch. Add  or Remove  access to specific branches of your company. To update a user's password – click Change Password and enter/confirm new password. Provide the updated password to the user. 

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

New User 2-Step Validation

Step	Action
1	<p>A Welcome to Wholesale Portal email will be sent to the address provided in user setup.</p> <ul style="list-style-type: none"> Click the Password Authentication link. <div data-bbox="467 464 1333 821"> <p>Hi, Path</p> <p>User Activation Email. Step 1 of 2.</p> <p>Please click on the "Password Authentication" link to activate your account.</p> <hr/> <p>Email Address: pathtest2023@gmail.com</p> <p>Password Authentication</p> </div>
2	<p>A verification pop-up will appear. Enter all required fields and click Update.</p> <div data-bbox="500 936 1312 1476"> <p>Verification</p> <p>* Email Address: <input type="text" value="path@gmail.com"/></p> <p>* New Password: <input type="password" value="....."/></p> <p>* Verify New Password: <input type="password" value="....."/></p> <p>— <input type="checkbox"/> Password Requirements: _____</p> <p>Update</p> </div> <p> Password Requirements:</p> <ul style="list-style-type: none"> ✓ MUST contain at least 8 characters ✓ MUST contain at least one uppercase letter ✓ MUST contain at least one lowercase letter ✓ MUST contain at least one number ✓ MUST contain at least one special character

Step	Action
3	<p>A Verification Successful pop up will appear. Click OK and return to your email account.</p> 
4	<p>You will receive a second email with your user ID and the link to the new portal. Click HB Wholesale Portal to access P.A.T.H.</p> 