

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.**

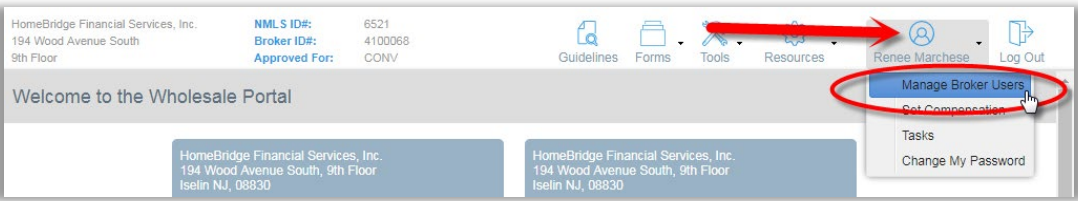
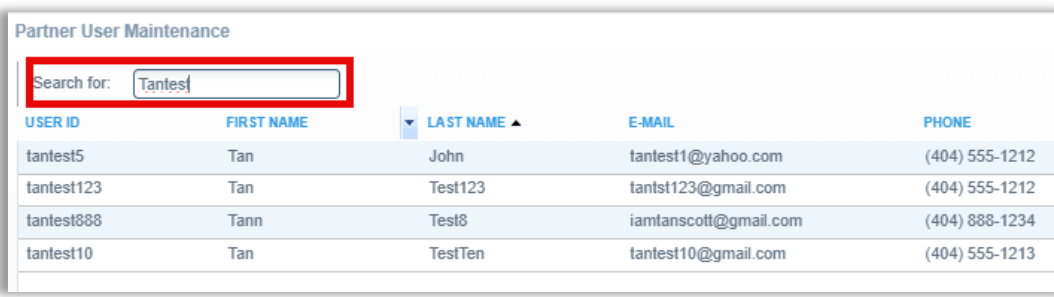
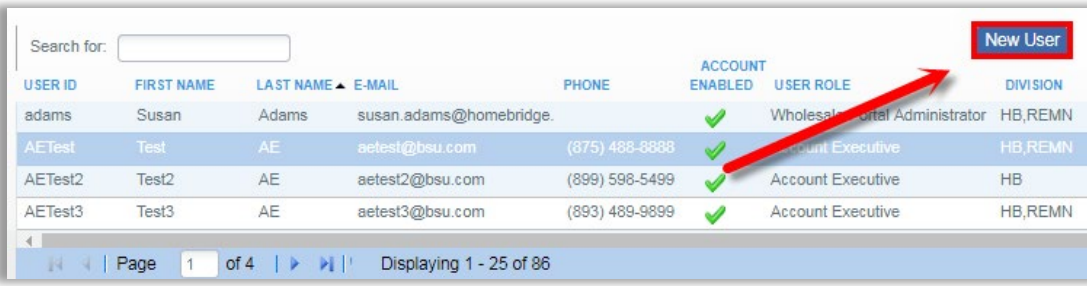
Example – The roles of Wholesale Processor & Wholesale Secondary give access to all job functions except for managing portal access, setting compensation, and Purchase Advice screens.

P.A.T.H. Access Roles

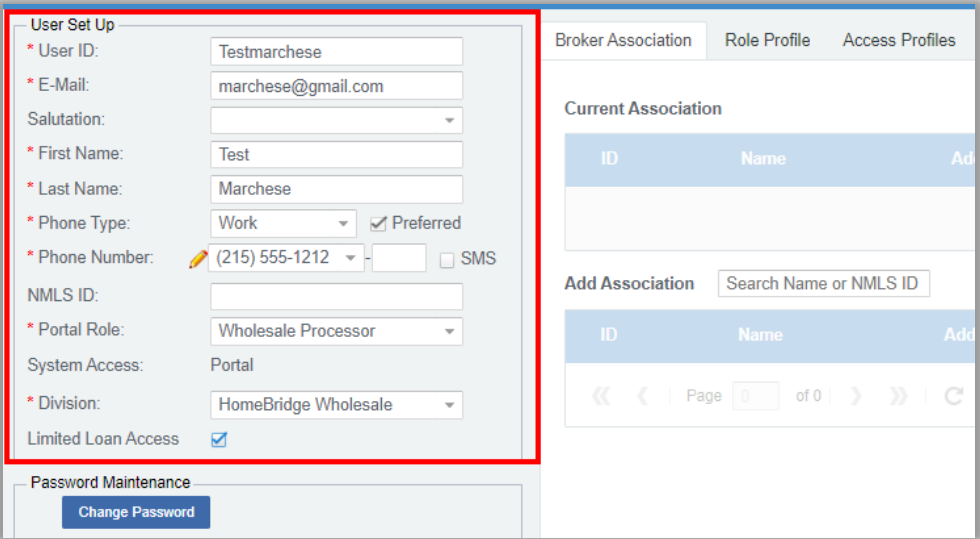
Role	Permissions
Wholesale Portal Administrator	<ul style="list-style-type: none"> • Includes permissions for ALL roles and screens. • Manages Broker user profiles. • Update passwords. • Set Compensation (Not applicable to Branch Portal Administrator). • Alerts & Notification Management.
Wholesale Manager	<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.

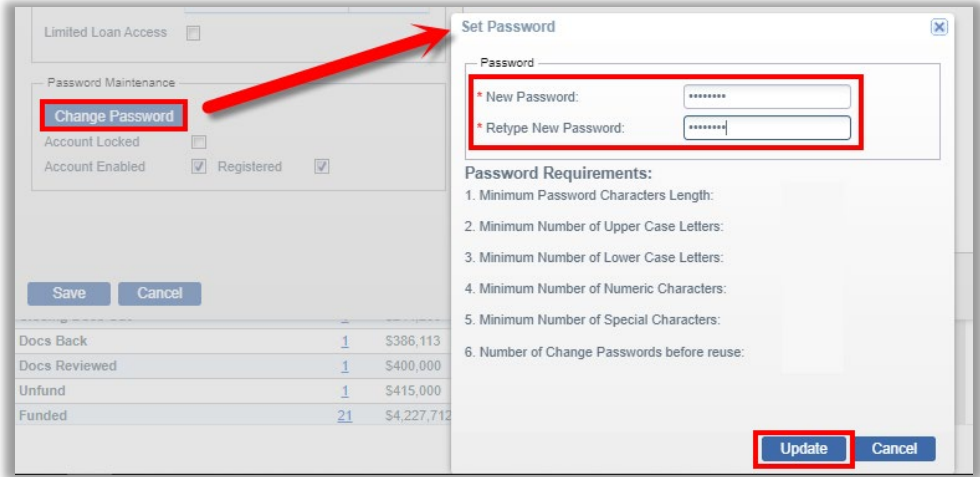
P.A.T.H. Access Roles - Continued	
Wholesale Underwriter	<p>Can:</p> <ul style="list-style-type: none"> • Review Conditions and upload documents. • Submit Change of Circumstance and FHA Change Requests. <p>Cannot:</p> <ul style="list-style-type: none"> • View, Lock loans or manage locks (unless also 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


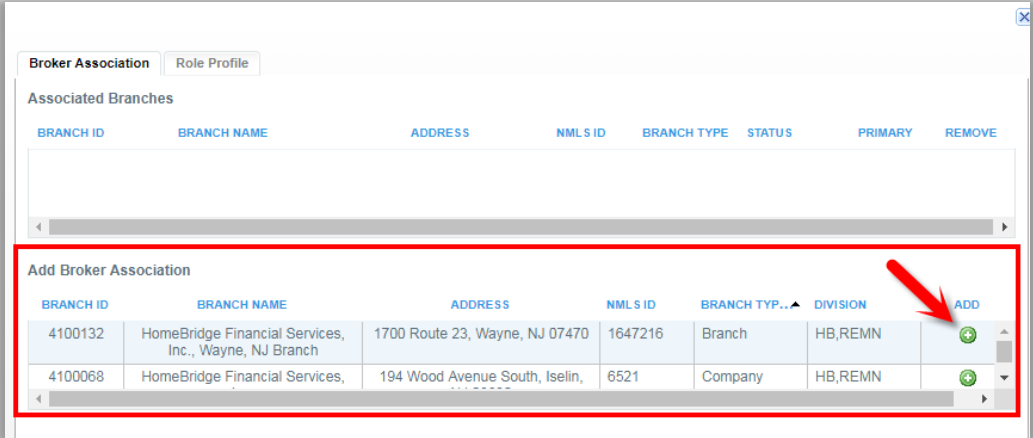
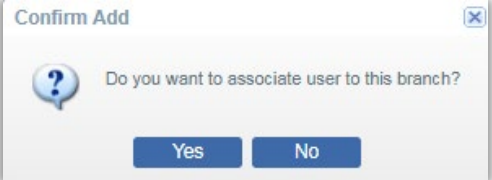
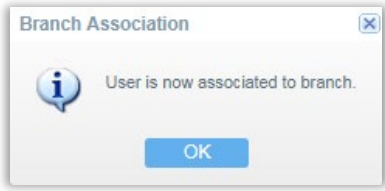
Add a New User

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.  <table border="1" data-bbox="389 787 1437 1081"> <thead> <tr> <th>USER ID</th> <th>FIRST NAME</th> <th>LAST NAME</th> <th>E-MAIL</th> <th>PHONE</th> </tr> </thead> <tbody> <tr> <td>tantest5</td> <td>Tan</td> <td>John</td> <td>tantest1@yahoo.com</td> <td>(404) 555-1212</td> </tr> <tr> <td>tantest123</td> <td>Tan</td> <td>Test123</td> <td>tantst123@gmail.com</td> <td>(404) 555-1212</td> </tr> <tr> <td>tantest888</td> <td>Tann</td> <td>Test8</td> <td>iamtanscott@gmail.com</td> <td>(404) 888-1234</td> </tr> <tr> <td>tantest10</td> <td>Tan</td> <td>TestTen</td> <td>tantest10@gmail.com</td> <td>(404) 555-1213</td> </tr> </tbody> </table> <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>  <table border="1" data-bbox="373 1344 1453 1627"> <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,REM,N</td> </tr> <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,REM,N</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,REM,N</td> </tr> </tbody> </table>	USER ID	FIRST NAME	LAST NAME	E-MAIL	PHONE	tantest5	Tan	John	tantest1@yahoo.com	(404) 555-1212	tantest123	Tan	Test123	tantst123@gmail.com	(404) 555-1212	tantest888	Tann	Test8	iamtanscott@gmail.com	(404) 888-1234	tantest10	Tan	TestTen	tantest10@gmail.com	(404) 555-1213	USER ID	FIRST NAME	LAST NAME	E-MAIL	PHONE	ACCOUNT ENABLED	USER ROLE	DIVISION	adams	Susan	Adams	susan.adams@homebridge.		✓	Wholesale Portal Administrator	HB,REM,N	AETest	Test	AE	aetest@bsu.com	(875) 488-8888	✓	Account Executive	HB,REM,N	AETest2	Test2	AE	aetest2@bsu.com	(899) 598-5499	✓	Account Executive	HB	AETest3	Test3	AE	aetest3@bsu.com	(893) 489-9899	✓	Account Executive	HB,REM,N
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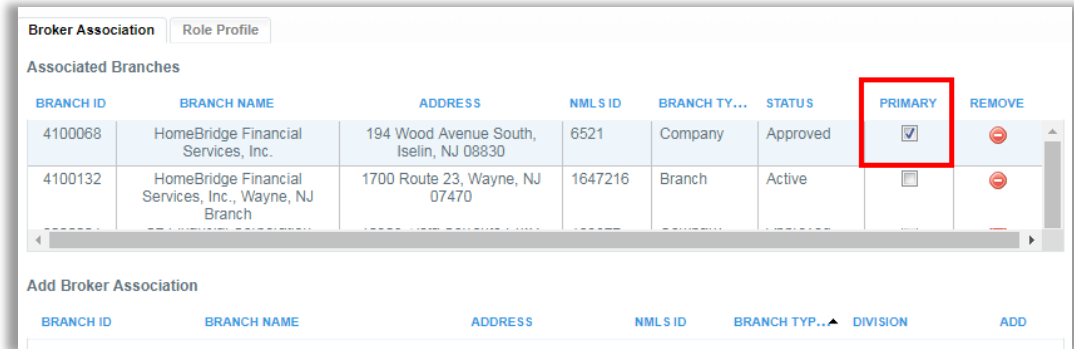
3	<p>Enter the User Set Up information.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div> <p>Helpful Tips:</p> <ul style="list-style-type: none"> Select the PATH Access Roles and select Division: Homebridge Wholesale. Choose an easy User ID such an email address (between 5-20 characters) to limit future inquiries. Select Limited Loan Access for LO only pipeline view.
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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> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div>
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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
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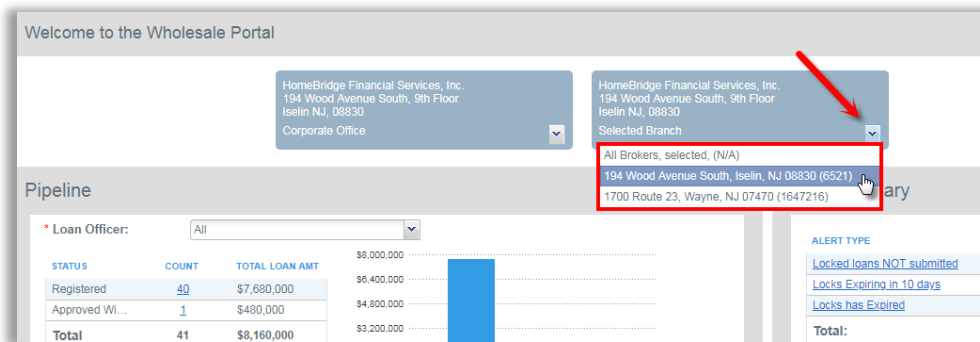
If the user is associated with more than one (1) branch, select the **Primary** branch to display on the user's Home Screen.



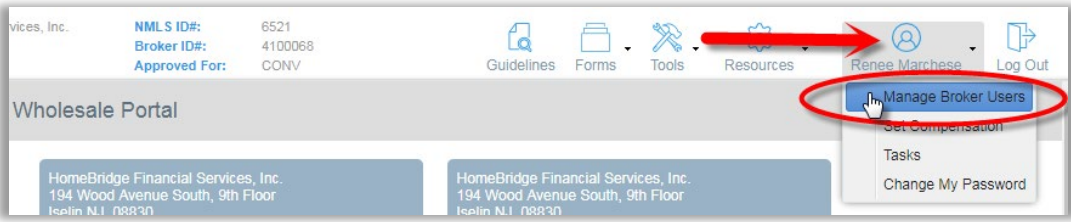
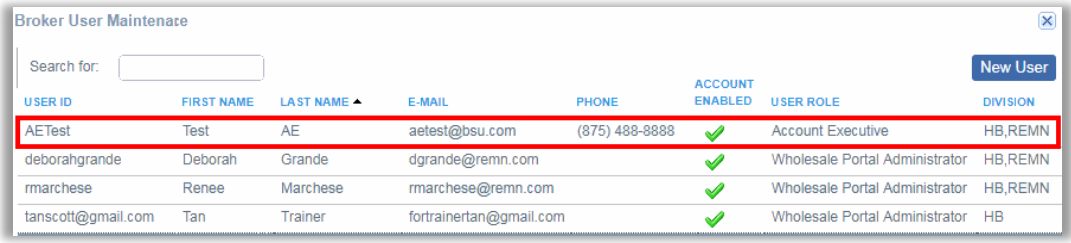
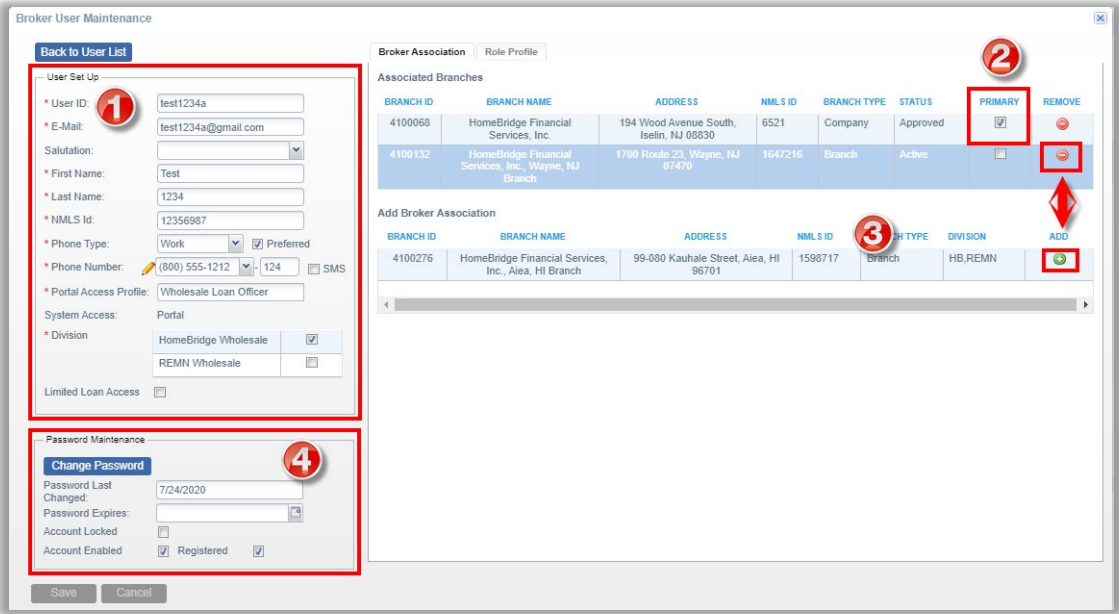
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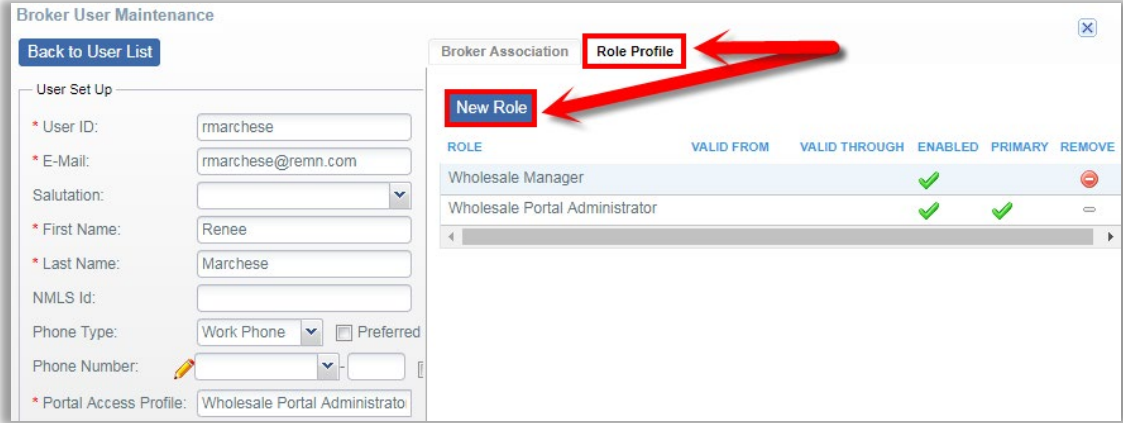
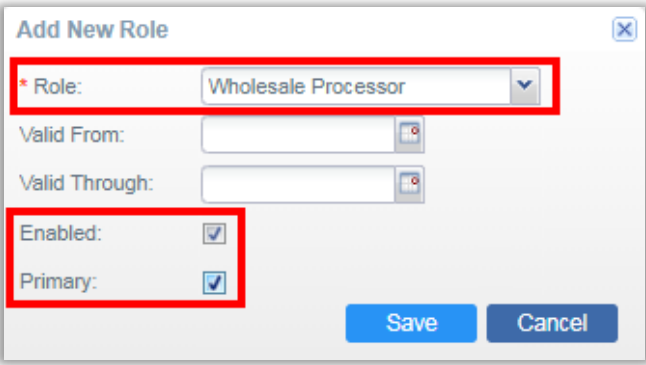


Helpful Tip: Users associated with more than one branch can view information for each branch on the home screen by selecting the desired branch from the dropdown.



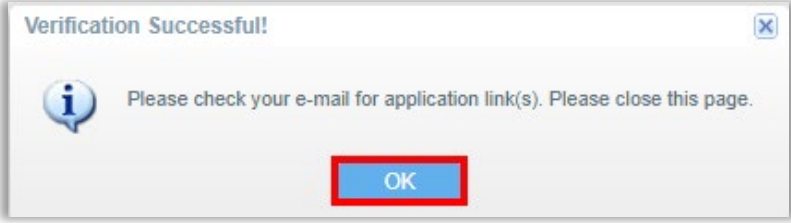
Edit User Profiles

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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>  <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <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 style="border: 2px solid red;"> <td>AETest</td> <td>Test</td> <td>AE</td> <td>aetest@bsu.com</td> <td>(875) 488-8888</td> <td style="text-align: center;">✓</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 style="text-align: center;">✓</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 style="text-align: center;">✓</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 style="text-align: center;">✓</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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3	<p>The user's current settings will display. Update the information as necessary.</p> <ol style="list-style-type: none"> 1. Update User ID, E-Mail, Name, select Division, Limit Loan Access, etc. <ul style="list-style-type: none"> • To add Phone Number click the . 2. Update the Primary Branch. 3. Add or Remove access to specific branches of your company. 4. 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.  <table border="1" data-bbox="771 520 1453 630"> <thead> <tr> <th>ROLE</th> <th>VALID FROM</th> <th>VALID THROUGH</th> <th>ENABLED</th> <th>PRIMARY</th> <th>REMOVE</th> </tr> </thead> <tbody> <tr> <td>Wholesale Manager</td> <td></td> <td></td> <td>✓</td> <td></td> <td>⊖</td> </tr> <tr> <td>Wholesale Portal Administrator</td> <td></td> <td></td> <td>✓</td> <td>✓</td> <td>⊖</td> </tr> </tbody> </table>	ROLE	VALID FROM	VALID THROUGH	ENABLED	PRIMARY	REMOVE	Wholesale Manager			✓		⊖	Wholesale Portal Administrator			✓	✓	⊖
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Wholesale Manager			✓		⊖														
Wholesale Portal Administrator			✓	✓	⊖														
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 style="border: 1px solid #ccc; padding: 10px; margin: 10px 0; text-align: center;"> <p style="font-size: 24px; margin: 0;">Hi, Path</p> <p style="margin: 0;">User Activation Email. Step 1 of 2.</p> <p style="margin: 0;">Please click on the "Password Authentication" link to activate your account.</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 10px 0;"/> <p style="margin: 0;">Email Address: pathtest2023@gmail.com</p> <p style="margin: 0;">Password Authentication</p> </div>
2	<p>A verification pop-up will appear. Enter all required fields and click Update.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0; text-align: center;"> <p style="font-weight: bold; margin: 0;">Verification</p> <p style="margin: 5px 0;">* Email Address: <input style="width: 150px;" type="text" value="path@gmail.com"/></p> <p style="margin: 5px 0;">* New Password: <input style="width: 150px;" type="password" value="....."/></p> <p style="margin: 5px 0;">* Verify New Password: <input style="width: 150px;" type="password" value="....."/></p> <p style="margin: 5px 0;">— <input type="checkbox"/> Password Requirements: _____</p> <p style="margin: 10px 0;"><input style="border: 2px solid red; padding: 5px 15px;" type="button" value="Update"/></p> </div> <p style="margin-top: 20px;">💡 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> 