

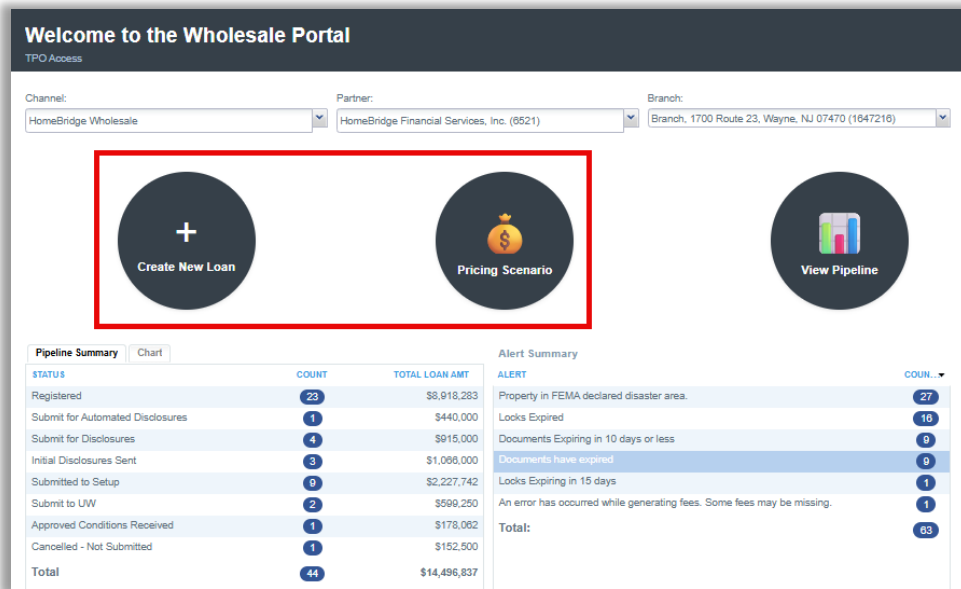
P.A.T.H. BROKER PORTAL REDESIGN

1. Home Screen - Redesign

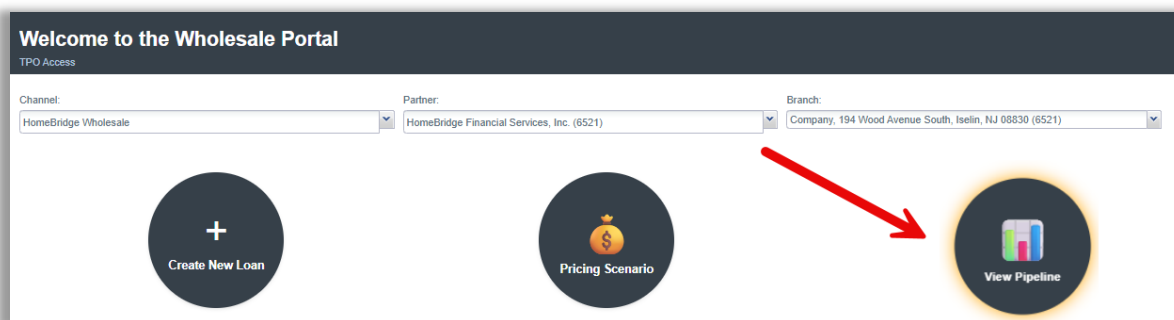
The following updates have been made to the P.A.T.H. home screen:

New Shortcuts

- Create a New Loan (Import Loan File)
- Pricing Scenario (Generate Pricing Scenario)



Click the new **View Pipeline** button to see your pipeline with links to screens that require attention.



LOAN NUMBER	BORROWER	LOAN STATUS	ACTIONS
2402002227	HOMEOWNER, JOHN	Registered	Loan Submission/Disclosure Loan Conditions Order Appraisal Closing Disclosure & Details
2402002228	HOMEOWNER, JOHN	Registered	Loan Submission/Disclosure Loan Conditions Order Appraisal Closing Disclosure & Details
2402002229	Customer, Ken	Registered	Loan Submission/Disclosure Loan Conditions Order Appraisal Closing Disclosure & Details
2402002230	HOMEOWNER, JOHN	Registered	Loan Submission/Disclosure Loan Conditions Order Appraisal Closing Disclosure & Details

This view displays the **Borrower, Loan Status, and Actions.**

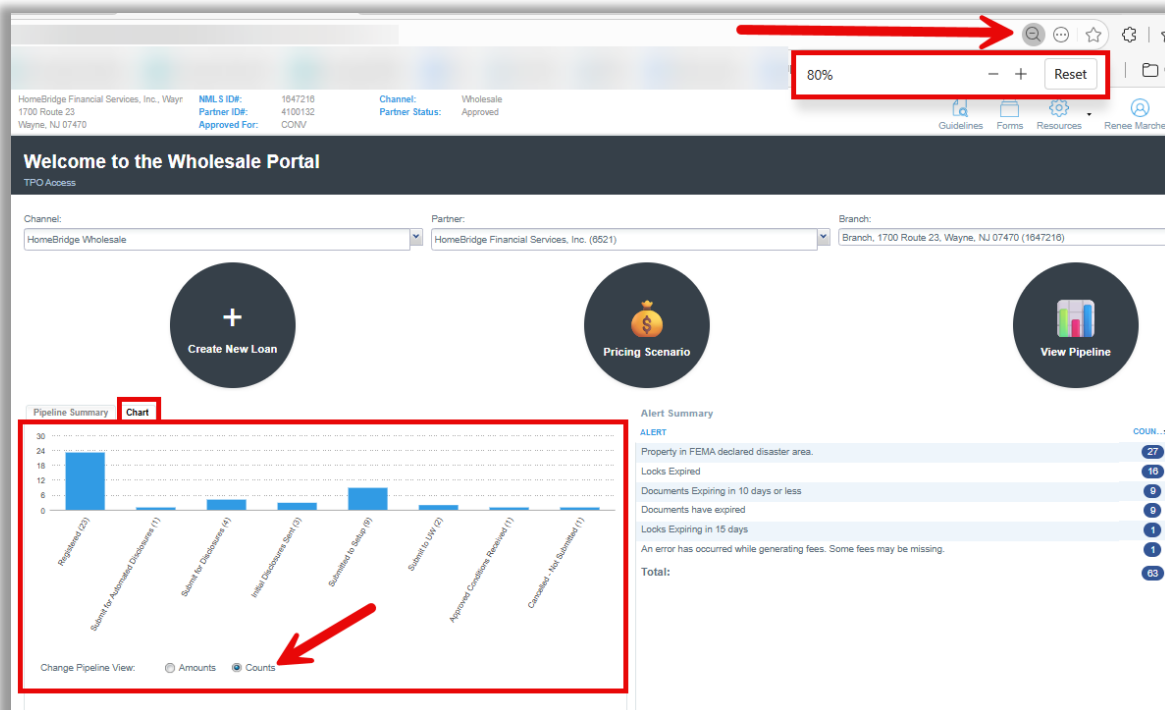
- Click the blue Action buttons to complete required actions
- Gray Action buttons do not require attention

[Loan Submission/Disclosure](#)

[Loan Conditions](#)

Note: To view the charts:

- Zoom out to **80%**
- Scroll down and select **Counts** to display graph of # of loans
- To view Pipeline dollar volume select **Amounts**.



2. Loan Banner – Status Chevrons

P.A.T.H. now displays Status Chevrons to track loan progression at a glance.

- Current milestone displays **Blue**, completed milestones are **Green**
- Hover over each chevron for status details

The screenshot displays the Loan Banner interface. At the top, there are fields for Lender Loan Number (2402006971 ED), Lock Expiration (Rate Lock Expired), Borrower Name (Customer, Ken N.), Subject Property (523 Conventional Circle Burnet, TX 7861...), LTV/CLTV (58.95% / 58.95%), Loan Purpose (Purchase), Product (Conv Conforming 30 yr Fixed), Interest Rate (6.125%), Occupancy (Primary Residence), Ratios (6.38% / 9.58%), Total Loan Amount (\$168,007.00), and Loan Amount (\$168,007.00). A 'Preview Docs' button is also present.

Below these fields is a horizontal bar with status chevrons: Application (highlighted in blue), Set-Up (green), Underwriting (green), Approved (green), Clear to Close (green), Closing (green), and Funding (green). A red box highlights the 'Application' chevron, which is currently selected.

Below the chevrons, there are several sections:

- Account Executive Name:** Test AE, **Account Executive Email:** [Redacted]
- APR:** 6.176%, **Cash To Close:** \$291,142.89
- P & I Payment Amount:** \$1,020.83
- Property Type:** Detached, **Occupancy:** Primary Residence, **Appraised Value:** \$285,000.00, **Refinance Purpose:** [Redacted]
- Document/Item Expires On:** 11/01/2025 (Total Expired: 2)
- Critical Dates:**
 - Submit To Underwriting Date: 7/23/2025
 - Approval Date: [Redacted]
 - Loan Reference Dates:**
 - TRID Application Date: 7/23/2025
 - Initial Disclosure Due Date: 7/28/2025
 - ECOA Application(Reg B) Date: 7/23/2025
 - Intent to Proceed Date: 7/23/2025
 - First Allowable Closing Date: [Redacted]
 - Estimated Closing Date: 8/21/2025
 - Firm Closing Date: [Redacted]
 - Initial CD Due Date - Mail: 8/12/2025

3. Menu Tree

Easily return to the **Home** screen or **Pipeline** view with new Spine/Menu Tree hyperlinks.

The screenshot displays the Menu Tree interface. On the left, there is a vertical list of navigation options: Home (highlighted in blue), View Pipeline (highlighted in blue), Loan Summary, Loan Processing, Full Application, and Loan Purchasing. A red box highlights the 'Home' and 'View Pipeline' options.

On the right, there are fields for Lender Loan Number (2402006971 ED) and Lock Expiration (Rate Lock Expired). Below these fields is a green button labeled 'Application'.