



Worker Classification

Background

When [Temporary Authority](#) (TA) was introduced in 2019, a new classification was introduced to the NMLS Relationship Wizard that allowed companies to indicate whether an individual is a W2 or Non-W2 employee. See the [NMLS Policy on Temporary Authority to Operate for Mortgage Loan Originators: Sponsorship and Worker Classification](#) for more information.

If your NMLS dashboard displays a warning message that one or more individuals with whom you have a relationship does not have worker classification information populated in NMLS, you can clear the warning message by updating your relationship with them to indicate either W2 or Non-W2 employee.

NOTE: Individuals that do not have worker classification populated in NMLS still have a valid relationship, and that does not impact any publicly presented information. However, until worker classification information is populated in NMLS, the individual is not able to apply for TA.

Using the Individual Roster (Company) Report

Use the Individual Roster (Company) Report to identify the individuals without worker classification information populated in NMLS.

1. Click **Reports**.



2. Click **Request New Report**.



3. Select **Individual Roster (Company)**.

Report Name ▼

- Authorized Agent Roster Report (Company)
- Company/Branch Active License Items (Company)
- Company/Branch Roster by Contact Information (Company)
- Company/Branch Roster by License Type (Company)
- Criminal Background Check Compliance (Company)
- Expired Business Activities (Company)
- Individual Active License Items (Company)
- Individual Roster (Company)**
- MLO TA Eligibility Report (Company)
- PE and Testing Compliance (Company)
- PE and Testing Non-Compliance (Company)
- Surety Bond Roster (Company)

- Click **Select Report**.

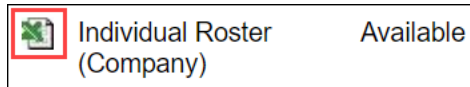
Select Report

- Click **Request Report**.

Request Report

- Refresh the page until the report status changes from “Pending” to “Available.”

- Click the **Excel icon** to download the report.



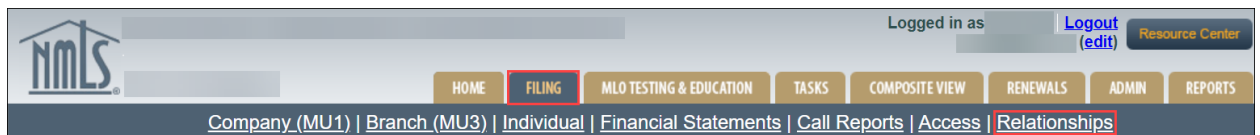
RESULT: The report is available to open via your browser.

- Use this report to identify the individuals that do not have worker classification information populated in NMLS.

NOTE: **Column P** indicates if worker classification has been populated for the individual. Record the **Individual NMLS ID #** for those that do not have worker classification information populated.

Updating Relationship Information for an Individual

- Click **Filing**.
- Click **Relationships**.



- Enter the desired **Individual ID**.
- Click the **hyperlinked individual ID #**.
- Click the **edit** icon.
- Click **Edit**.

Edit

7. Select the desired worker classification.
8. Click **Save**.

Select the worker classification below. If the individual is a W2 Employee that also has a Non-W2 Employee role (e.g. Appointed Officer), select W2 Employee.

☒ W2 Employee
☐ Non-W2 Employee (Independent Contractors, Appointed Officers or Directors, Owners, etc.)

Edit the Worker Classification Begin Date:

MM/DD/YYYY

Save

Cancel

RESULT: The worker classification information is updated for the individual.

For further assistance, please contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123).