



Surety Bond Producer User Types and Roles

This guide defines the functionality available to surety bond producer user types and provides the available roles that can be assigned to Organization Users within a Surety Bond Producer entity.

Account Administrators are granted full access to the entity's NMLS account. This includes all functionality included in the roles described below.

Organization Users are created by Account Administrators and are automatically given access to view the entity's profile within the *Composite View* tab. During the account creation process, the Account Administrator is able to grant the roles described below. There is no limit to the number of roles that may be assigned to one Organization User.

Roles available to be assigned to Organization Users:

- | | |
|--|--|
| Manage Associations and Representatives | <ul style="list-style-type: none">• Manage representatives for the entity• View and manage associations<ul style="list-style-type: none">○ For Requested Associations: Accept, Reject, and Request Corrections○ For Active Associations: Request Corrections and Remove• NOTE: Surety Companies must initiate the association request with a Surety Bond Producer before the Producer can accept the association. |
| Manage Bonds | <ul style="list-style-type: none">• Create and view bonds and bond riders• Sign bonds and bond riders
<i>(if assigned as representative and associated to a Surety Company/Surety Bond Producer Association. For more details see the Representative section below)</i> |
| Manage Surety Bond Producer Profile | <ul style="list-style-type: none">• Manage entity profile, including contact information and state authorizations |
| View Confidential Information | <ul style="list-style-type: none">• View EIN in the entity profile |
| Manage Reports | <ul style="list-style-type: none">• Request and view report(s) |

Representatives

In order for an Organization User to have the ability to sign bonds, they must be assigned the "Manage Bonds" role **AND** be designated as a Representative.

Organization Users are designated as Representatives on the *Surety Company Associations* page under the *Tasks* tab.

Designated representatives will have the ability to sign bonds and bond riders on behalf of a surety company once they are identified on an active association for the surety bond producer entity.