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Account Administration

Account Administration refers to the management of user accounts. The NMLS Call Center and Account Administrators (AAs) for companies share responsibility for maintaining user accounts in NMLS.

User Types

- Account Administrator
- Organization User

What is an Account Administrator?

AAs are identified through the account creation process and are the only persons inside a company that can set up access and rights for additional Organization Users (OU) in NMLS. Since AAs are the only parties that can create and manage OUs for the company, it is required that a primary and secondary AA be established during company account creation. For more information visit the NMLS Resource Center.

An Account Administrator can:

- Create login access for users in a company who will be using NMLS. This process systematically creates a user name and password for the user.
- Manage roles for OUs.
- Modify an AA's and/or OU's information (First and Last Name, Phone Number, and Email Address).
- Unlock an AA's and/or OU's login.
- Enable or disable an AA's and/or OU's login.
- Delete an AA's and/or OU's login.
- Reset passwords for an AA's and/or OU's login.

An Account Administrator cannot:

- Manage roles for their own or another AA's account; AAs by default are given all available roles
- Create another AA account.

What is an Organization User?

AAs have the ability to create OUs. OUs are employees within an organization that are responsible for performing tasks for the organization in NMLS like creating associations or maintaining the company record. Selecting all roles does not make the user an AA. A user with all rights in the System will still not have the ability to set up other users for their organization.

NOTE: In order to grant OUs access to ESB functionality, it is important to understand the various roles and how to assign them. Use the following documents about Surety Company and Surety Bond Producer user types and roles to better understand how to assign roles appropriately:

- Surety Company User Types and Roles
- Surety Bond Producer User Types and Roles

How to Create an Organization User Account

1. From the *NMLS Home* screen, click the **Admin** tab.
2. Click **Create Organization User** on the left navigation panel.
3. Enter the user's First Name, Middle Name (optional), Last Name, Phone Number, and Email Address (twice). This email address must be valid as it will be used by NMLS to deliver account information.
4. Click the **Next** button (see *Figure 1*).

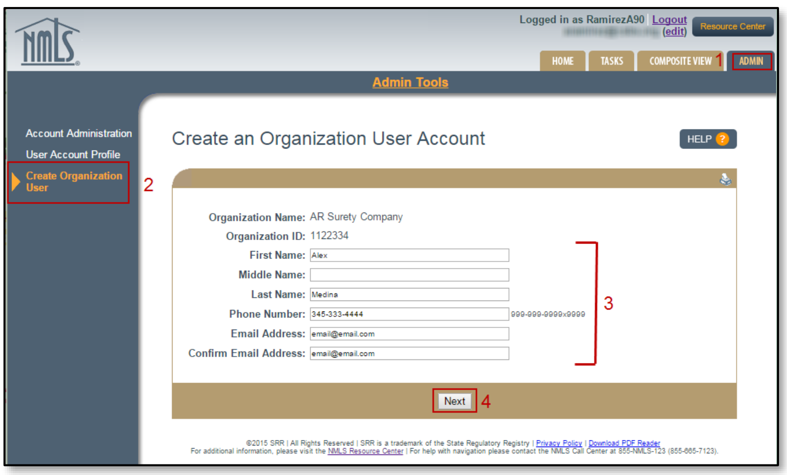

Figure 1: How to Create an Organization User Account

5. Select the role(s) needed for the user to perform their job responsibilities in NMLS (See *Description of User Roles* for futher details).
6. Click the **Next** button.

7. Review the user information and click the **Finish** button (see *Figure 2*).

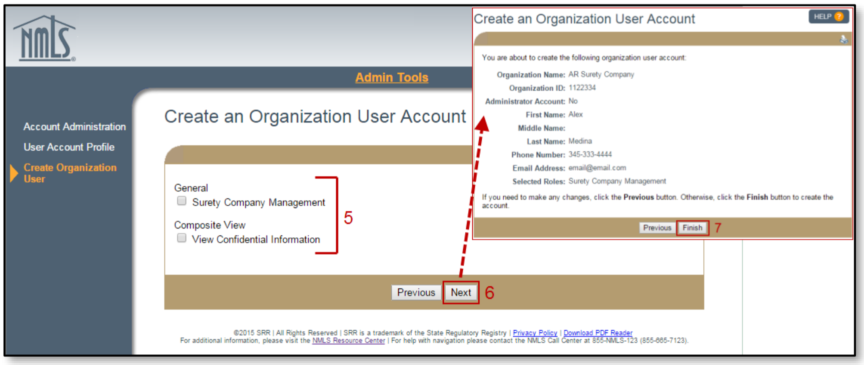

Figure 2: Creating an Organization User

NOTE: Email confirmation with the user name (including a list of assigned roles) and a temporary password will be sent to the user at the email address entered on the previous page.

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How to Identify Organization Users as Representatives

All Organization Users (OUs) can be identified as Representatives regardless of roles assigned. **NOTE**: Creating a Representative with no roles assigned will prevent the individual from having access to edit company information or view confidential information.

1. To create Representatives follow the How to Create Organization User Account (page 3) instructions.
2. Once the user account has been created, click the link provided to identify the user as a Representative. (Tasks tab > *Surety Company Assocations* > *Representatives*).
3. Check the box to indicate the user is a representative and provide their NPN number.
4. Click the **Save** button.

Available Actions for an Account Administrator

Account Administrators navigate to the *User Account Profile* screen to manage User Accounts.

How to Access the User Account Profile

1. From the *NMLS Home* screen, click the **Admin** tab.
2. Click the **User Account Profile** link on the left navigation panel.

3. Enter a combination or one of the following user information to search: User Name, First Name, Middle Name and Last Name.

   NOTE: To view all account users, leave the search fields blank and click the **Search** button.
4. Click the **Search** button.
5. Click the **User Name** of the individual you would like to edit (see *Figure 3*).

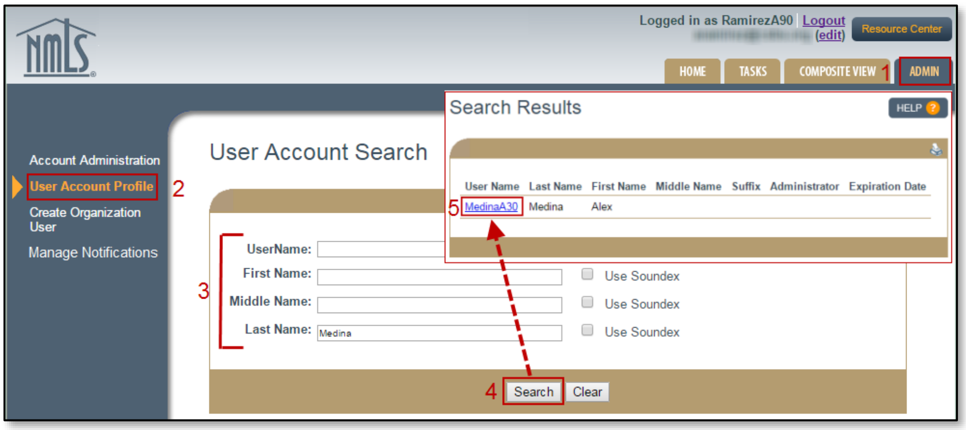

Figure 3: User Account Search

The following actions can be completed from the *User Account Profile* screen (see *Figure 4*):

A. Modify Profile Information – AAs can modify the First Name, Middle Name, Last Name, Phone Number, and Email Address for users.

NOTE: When the name on a Surety Bond Producer user profile is changed for a user who is a representative on any active association (requested, request correction, or approved), the individual is removed from all active associations. Notification including the user’s old and new name is sent to subscribed Surety Bond Producer users and all Surety Companies with affected associations.

B. Manage Roles – AAs can remove access or grant additional access to NMLS functionality by modifying the roles assigned to organization users.

C. Unlock User Accounts – AAs can unlock user account passwords for users. A user account will be locked if they unsuccessfully attempt to log into the NMLS application three times within 24 hours. A message indicating that the user account has been locked will display.

D. Disable or Enable User Accounts – A user whose account has been disabled by an AA will not be able to log into NMLS. The user will be able to log in to NMLS only after the account has been enabled by an AA. As an example, a user who is out on extended leave could have their account disabled by an AA until they return.

E. Delete User Accounts – A deleted user account cannot be re-used. A new user account will have to be created by an AA in order for the user to log in to NMLS. Users should be deleted if they no longer require access to NMLS, such as having departed the organization. If they may require access in the future, disabling their account will remove access until enabled by an AA.

F. Reset User Passwords – AAs can reset user passwords in the event that a user has forgotten their Security Answer and cannot reset the password themselves.

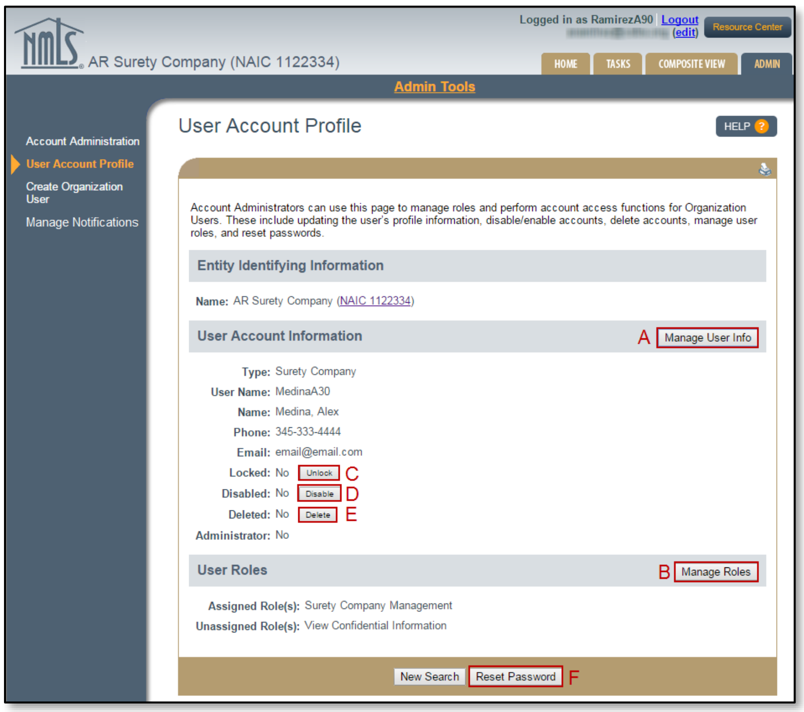

Figure 4: User Account Profile

Instructions for these actions are as follows (see pages 6 – 8):

A. How to Modify User Account Information

1. From the *User Account Profile* screen, click the **Manage User Info** button (see *Figure 4*).
2. Enter the revised information in the fields.

3. Click the **Save** button (see *Figure 5*).

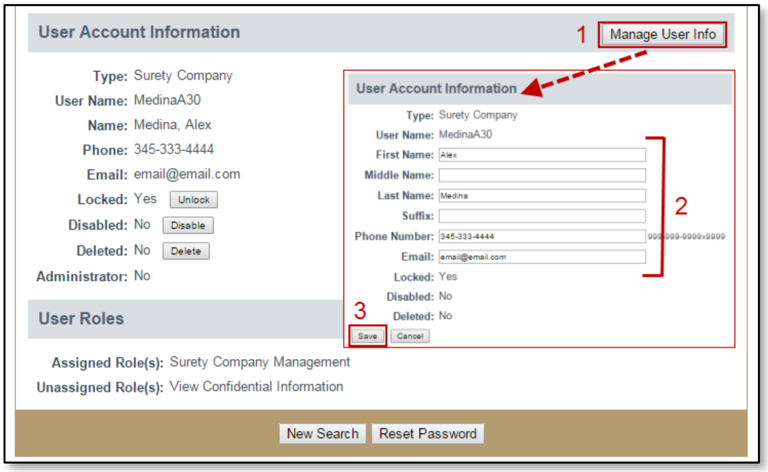

Figure 5: Manage User Info

B. How to Modify Roles

1. From the *User Account Profile* screen, click the **Manage Roles** button (see *Figure 4*).
2. Edit the User Role(s) by selecting or deselecting the checkbox(es).
3. Click the **Save** button (see *Figure 6*).

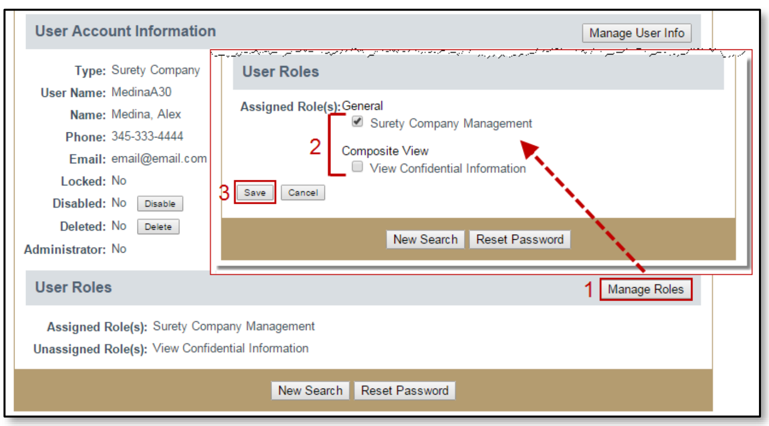

Figure 6: Manage User Roles

NOTE: If an AA modifies roles from a user account of a user that is currently logged into NMLS, those role changes will not take effect until the user logs out and back in.

C. How to Unlock a User Account

1. From the *User Account Profile* screen, click the **Unlock** button (see *Figure 4*).

D. How to Enable or Disable a User Account

1. From the *User Account Profile* page, click the **Disable** button or **Enable** button (see *Figure 4*).

E. How to Delete a User Account

1. From the *User Account Profile* page, click the **Delete** button (see *Figure 4*).
2. Click the **OK** button to confirm the deletion of the user account.

F. How to Reset the Password for a User Account

1. From the *User Account Profile* screen, click the **Reset Password** button (see *Figure 4*).

NOTE: The user will receive an email with a system-generated password which they will be required at the time of their next login. Users may copy and paste the system-generated password from the email to the NMLS login page. Upon logging in with the system-generated password, the user will be required to create a new password.

Account Administrators navigate to the *Manage Notifications* screen to manage System notification subscriptions.

How to Manage System Notification Subscriptions

1. From the *NMLS Home* screen, click the **Admin** tab.
2. Click the **Manage Notifications** link on the left navigation panel.

NOTE: The notifications listed in the blue information message at the top of the screen are defaulted to be sent to the AA. Notifications assigned to an OU will no longer be sent to the AA unless the AA subscribes to them, as well.

3. Click the **Add New Contact** button (see *Figure 7)*.

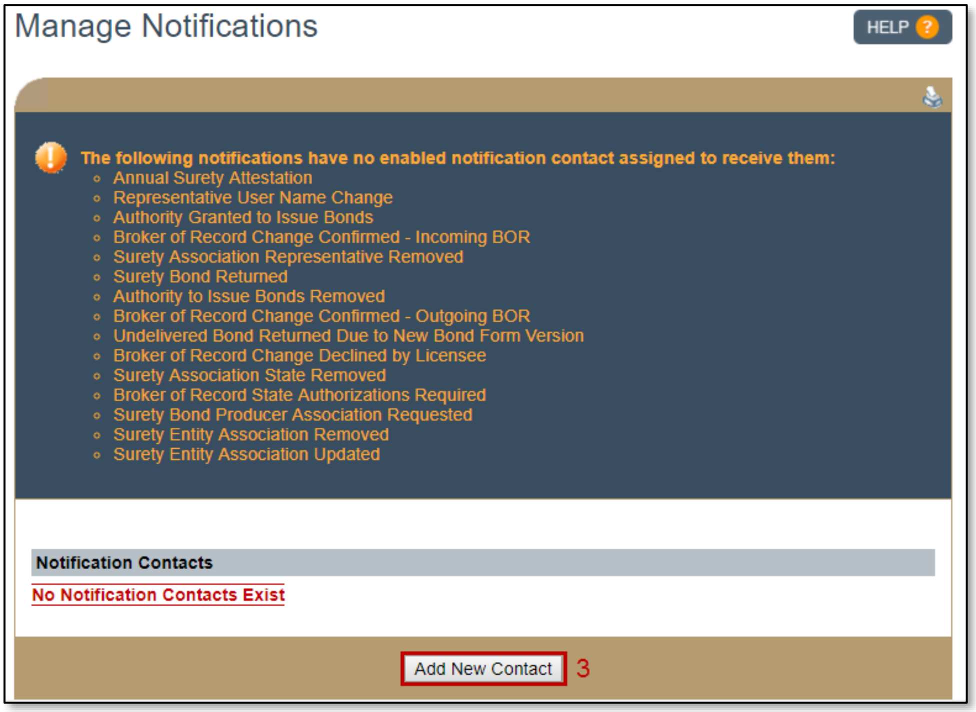

Figure 7: Manage Notifications

4. Search for and click the **User Name** of the individual you would like to use as a notification contact.
5. Confirm the user's contact information, ensuring that the Contact Staus is "Enabled."

6. Select the checkboxes for the notifications to be assigned to the user (see *Figure 8)*.

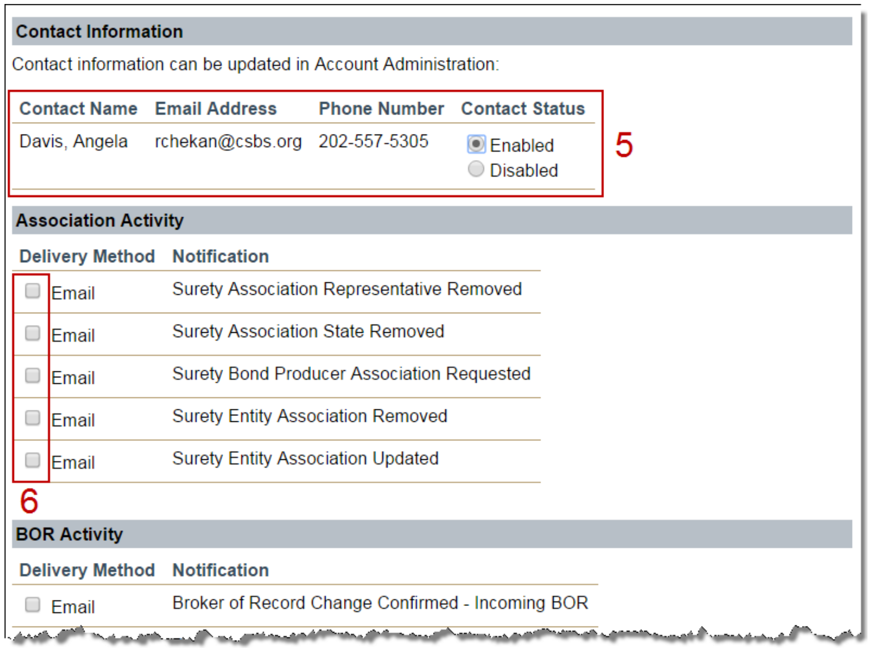

Figure 8: Assigning Notifications

7. Click **Save.**

All Users

All NMLS users have the ability to modify their user profile, account password, and security question from the User Profile sub-menu on the Home tab.

A. How to Modify the User Profile Information

When any user changes the name on the profile for a Surety Company Account Admin or Surety Company user with the Manage and Sign bonds role, an email is sent to the Account Administrators for the user's Surety Company containing the old and new name fields.

1. From the Home tab, click the *User Profile* link on the sub-menu.
2. Click the *Update User Profile* link on the left navigation panel.
3. Update the necessary fields.
4. Click the **Save Changes** button.

   NOTE: Changes to First, Middle, or Last Name will not change the User Name. To change the User Name a new account needs to be created. If an OU needs a new account created they should contact their AA. If an AA needs a new account created they should contact the NMLS Call Center.

B. How to Change the Account Password

1. From the Home tab, click the *User Profile* link on the sub-menu.
2. Click the *Change Password* link on the left navigation panel.
3. Enter the old password and then enter the new password twice.
4. Click the **Change Password** button.

C. How to Change Security Question and Answer

1. From the NMLS Home screen, click the *User Profile* link on the sub-menu.
2. Click the *Change Security Question* link on the left navigation panel.
3. Enter the new information.
4. Click the **Change Security Question and Answer** button.

D. How to Reset the Account Password

1. From the NMLS Login Screen, click the *Forgot your Password?* link.
2. Enter the CAPTCHA code and click the **Next** button.
3. Enter your NMLS User Name.
   NOTE: NMLS user names are not case-sensitive.
4. Click the **Next** button.
5. Enter your Security Answer and click the **Next** button.
   NOTE: NMLS security questions are not case-sensitive.
6. If successful, NMLS displays an orange confirmation message. Check your email to retrieve the temporary password.
7. If unsuccessful, NMLS displays a red error message. If this occurs, contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123) for assistance.

E. How to Retrieve User Name

1. From the Log in to NMLS screen, click the **Forgot your User Name?** link.
2. Enter your NMLS User Profile email address and NMLS ID number.
3. Click the **Submit** button.

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