



## ACCOUNT ADMINISTRATION FOR COMPANY USERS

The Primary or Secondary Account Administrators (AAs) are the only individuals that can create and manage other Organization Users (OUs) to assist with performing tasks in NMLS. Each OU is assigned specific roles by an AA, which determines the tasks that can be performed.

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### How to Create an Organization User

1. Click the **Admin** tab.
2. Select the *Create New Organization User* link in the left navigation area.
3. Enter values for the First Name, Middle Name, Last Name, Title/Position, Phone Number, Email Address, and Confirm Email Address fields.

**NOTE:** The email address fields must be accurate because the System uses them to deliver account information.

4. Click the **Next** button (see *Figure 1*).

The screenshot shows the NMLS Admin Tools interface. The top navigation bar includes links for HOME, FILING, MLO TESTING & EDUCATION, TASKS, COMPOSITE VIEW, RENEWALS, ADMIN, and REPORTS. The ADMIN tab is selected. The left navigation pane shows the 'Create Organization User' link highlighted. The main content area is titled 'Create an Organization User Account'. It contains a form with the following fields: Organization Name, Organization ID, First Name, Middle Name, Last Name, Title/Position, Phone Number, Email Address, and Confirm Email Address. A red box highlights the First Name, Middle Name, Last Name, Title/Position, Phone Number, Email Address, and Confirm Email Address fields. A red arrow points to the 'Next' button at the bottom right of the form. Numbered callouts 1 through 4 indicate the steps: 1 points to the Admin tab, 2 points to the Create Organization User link, 3 points to the form fields, and 4 points to the Next button.

Figure 1: Create an Organization User Account

5. Select the checkbox to the left of the desired user role(s)/permission(s).

6. Click the **Next** button (see *Figure 2*).

**NOTE:** Clicking the Previous button displays the prior screen.

The screenshot shows a web interface titled "Create an Organization User Account". It features a list of role categories with checkboxes: Notifications (Manage Notification Contacts), State Filings (Create and Submit MU1/MU2 Filings, MU3/MU2 Filings, MU4 Filings, Financial Statement Filings, Mortgage Call Report Filings, Mortgage Call Report Financial Condition Filings, Mortgage Call Report Filings, Company Relationships), MLO Testing & Education (Manage Test Enrollments), Tasks (Access License Item List, Perform Authorized Agent Upload), Composite View (View Individual Composite, View Company/Branch Composite, View Confidential Information, View Testing and Education), Accounting (Financial Admin), Reporting (Manage Reports), and Renewals (Submit Renewal Requests). A red bracket labeled "3" groups the State Filings, MLO Testing & Education, Tasks, and Composite View sections. At the bottom, "Previous" and "Next" buttons are shown, with the "Next" button highlighted by a red box and the number "4".

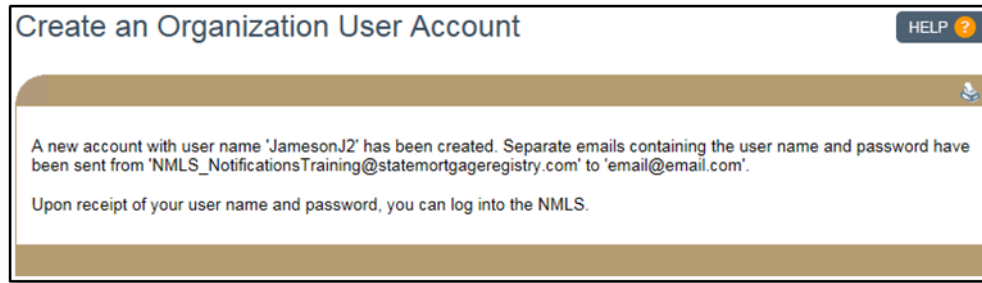
*Figure 2: Create an Organization User Account – Roles*

7. Click the **Finish** button (see *Figure 3*).

The screenshot shows the same web interface, but now displaying user details. It states: "You are about to create the following organization user account:". The details listed are: Organization Name: Third Mortgage Company, Organization ID: 50813, Administrator Account: No, First Name: James, Middle Name: (blank), Last Name: Jameson, Phone Number: 111-111-1111, Email Address: email@email.com, and Selected Roles: View Individual Composite, View Company/Branch Composite. Below this, it says: "If you need to make any changes, click the Previous button. Otherwise, click the Finish button to create the account." At the bottom, "Previous" and "Finish" buttons are shown, with the "Finish" button highlighted by a red box and the number "5".

*Figure 3: Finish Creating an Organization User*

8. The confirmation page will display. User name and password information is sent to the email address provided (see *Figure 4*).



*Figure 4: Confirmation - Organization User Created*

## How to Manage an Organization User's Roles

1. From the *User Account Profile* page, click the **Manage Roles** button in the User Roles section.
2. Select the desired roles using the checkboxes. See below for a description of the roles available.

### Notifications

*Manage Notification Contacts* - this role allows another company user to be designated as the Notifications Administrator (this is an admin role for notifications only). The Notifications Administrator can designate a user or users to receive notices, determine which notices the user will receive, and stop notices from being sent.

**NOTE:** If no user is assigned to receive the notification, the notification is sent to the Account Administrator(s).

### State Filings

*Create and Edit MU1/MU2 Filings* - this role allows the user to create and edit the complete MU1 (company application) and all associated MU2's (company control persons). This includes historical filings and those created by other individuals.

*Create and Submit MU1/MU2 Filings* - this role allows the user to create, edit, and submit to the regulator the complete MU1 (company application) and all associated MU2's (company control persons). This includes historical filings and those created by other individuals.

*Create and Edit MU3/MU2 Filings* - this role allows the user to create and edit the complete MU3 (branch application) and the associated MU2 for the branch manager. This includes historical filings and those created by other individuals.

*Create and Submit MU3/MU2 Filings* - this role allows the user to create, edit, and submit to the regulator the complete MU3 (branch application) and the associated MU2 for the branch manager. This includes historical filings and those created by other individuals.

*Create and Submit MU4 Filings* - this role allows the user to create, edit, and submit to the regulator the complete MU4 (licensed individual application) for any individual licensed or registered through your company. This includes historical filings and those created by other organization users.

*Create and Submit Financial Statement Filings* - this role allows the user to create, edit, and submit to the regulator any financial statement filings, along with key financial data, as required.

*Create and Submit Mortgage Call Report Filings* - this role allows the user to submit and manage Mortgage Call Reports.

*Edit Mortgage Call Report Financial Condition Filings* - this role allows the user to edit Mortgage Call Report Financial Condition Filings.

*View Mortgage Call Report Filings* - this role allows the user to view Mortgage Call Report Filings. Users with this role cannot edit or submit Mortgage Call Report Filings.

*Create and Edit MSBCR Filings* – this role allows the user to view, create, and edit MSB Call Report filings. Users with this role cannot submit MSB Call Report Filings.

*Create, Edit, and Submit MSBCR Filings* – this role allows the user to view, create, edit, and submit MSB Call Report filings.

*View MSBCR Filings* – This role allows the user to view MSB Call Report filings. Users with this role cannot create, edit, or submit MSB Call Report filings.

*Manage Company Relationships* - this role allows the user to establish, terminate, and view relationships (which generally indicates employment) between individuals (MU2/4) and the company.

#### MLO Testing & Education

*Manage Test Enrollments* - this role allows the user to create and submit test enrollment requests on behalf of an individual.

#### Tasks

*Access License Item List* - this role allows the user to have full access to the company's work list to process any work associated with filings that have been submitted for the company, its branches, or sponsored individuals.

*Perform Authorized Agent Upload* - this role allows the user to upload a list of entities that conduct money transmissions on behalf of a company that is licensed in NMLS, but not directly licensed themselves (i.e. "authorized delegates" or "agents").

#### Composite View

*View Individual Composite* - this role allows the user to view data associated with an individual record to which the company has access. This includes any MU2 or MU4 filings, the history of their licenses, any requirements or deficiencies that have been associated with their license(s), test enrollments and results, and education information.

*View Company/Branch Composite* - this role allows the user to view ALL data associated with a company and its branches. This includes any Company (MU1), or Branch (MU3) filings, the history of their licenses and any requirements or deficiencies that have been associated with their license(s).

*View Confidential Information* - this role allows the user to view the full social security number and date of birth of an individual associated with their company and its branches. This includes any Historical filings, and Composite. This role also allows the user to view the EIN or Tax ID for the company.

*View Testing and Education* - this role allows the user to view a list of official test results for each unique national and/or state test an individual has taken, as well as a list of open enrollment windows for them. This role also allows the user to view an individual's Course Completion Record, including all Pre-Licensure and Continuing Education.

#### Accounting

*Financial Admin* - this role allows the user to view all payments made in NMLS for the company. In addition, it allows for the user to repay failed payments.

#### Reporting

*Manage Reports* - this role allows the user to request and view reports.

**NOTE:** Renewal reports are separate from the report function and are only accessible through the Renewals tab.

#### Renewals

*Submit Renewal Requests* - this role allows the user to process and submit renewal requests for company, branch, and individual licenses/registrations. In addition, the submit renewal requests role allows the user to request Renewal Reports.

#### Surety Bonds

*Surety Bonds Management* – this role allows the user to create and manage bonds for a company to which they have access for a specific license. Bonds will be routed to the company for signature by the appropriate party, and then sent on to the relevant regulator.

**NOTE:** This role does not apply to individual Control Persons who are being designated as the signatory on a bond. Bond execution by Control Persons must be completed from the individual's NMLS account.

### **Getting Started: Managing Organization User Accounts**

1. Navigate to the [NMLS Resource Center](#).
2. Click **Log in to NMLS** in the upper right corner.
3. If prompted select the appropriate context, State, then log in to NMLS.
4. Click the **Admin** tab in the top right corner.
5. Click **User Account Profiles** on the left navigation panel.
6. Enter the individual's User Name, First, or Last Name, or leave the search criteria blank to get a list of all users.
7. Click the **Search** button.
8. Click the desired username hyperlink (see *Figure 5*).



User Name	Last Name	First Name	Middle Name	Suffix	Administrator	Expiration Date
JamesS2	James	Steven				
JamesonJ2	Jameson	James				

*Figure 5: Search Results*

## How to Manage User Information

The following information for any OU can be modified by an AA:

- First Name
- Middle Name
- Last Name
- Phone Number
- Email Address

1. From the *User Account Profile* page, click the **Manage User Info** button to the right of the *User Account Information* section header.
2. Change the appropriate information for the selected user.
3. Click **Save** to save the updates or **Cancel** to return to the *User Account profile*.

## How to Unlock an Account

1. From the *User Account Profile* page, click **Unlock** under the *User Account Information* section to unlock a user account.

## How to Reset a Password

1. From the *User Account Profile* page, click **Reset Password** at the bottom of the page.

**NOTE:** The user will receive an email with a complex system generated password, which they will be required to enter at the time of their next login. Users are encouraged to copy and paste the system generated password. The user will then be required to create a new password.

## How to Enable/Disable an Account

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.

1. From the *User Account Profile* page, click **Disable** or **Enable** under the *User Account Information* section.

**NOTE:** Click **New Search** to return to the *User Account Search* screen.

## How to Delete an Account

A deleted user account cannot be re-used. A new user account must be created by an AA for the user to log in to NMLS.

1. From the *User Account Profile* page, click **Delete Account** under the *User Account Information* section.
2. Click **OK** to confirm the deletion of the user account.

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