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.

How to Create an Organization User

1. Enter values for the First Name, Middle Name, Last Name, Phone Number, Email Address, and Confirm Email Address fields.

   NOTE: The Email Address must be correct as it will be used by the System to deliver account information.

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

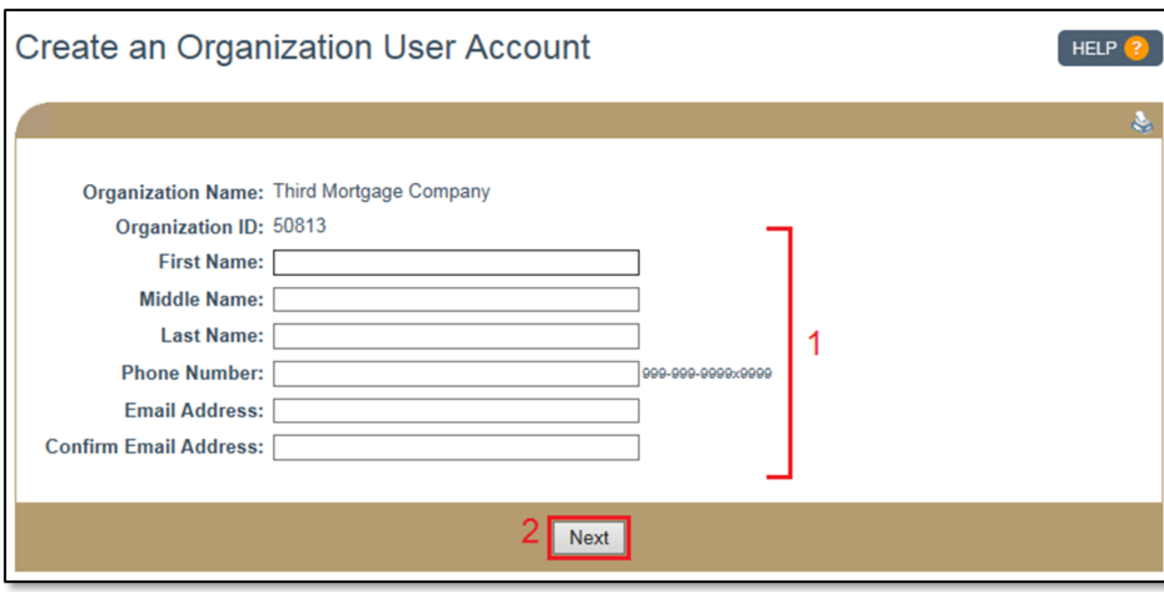

Figure 1: Create an Organization User Account

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

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

NOTE: Clicking the Previous button displays the prior screen.

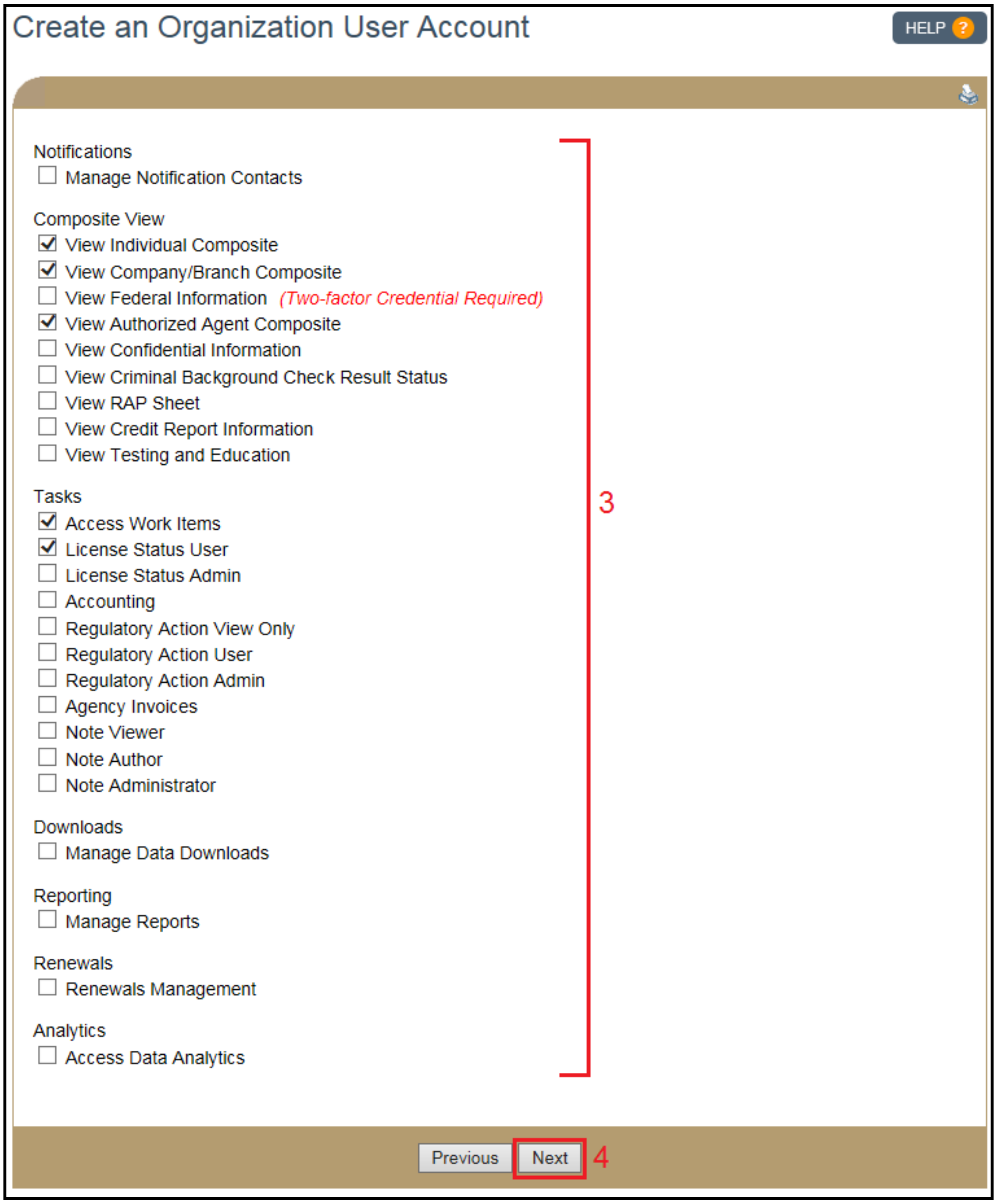

Figure 2: Create an Organization User Account - Roles

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

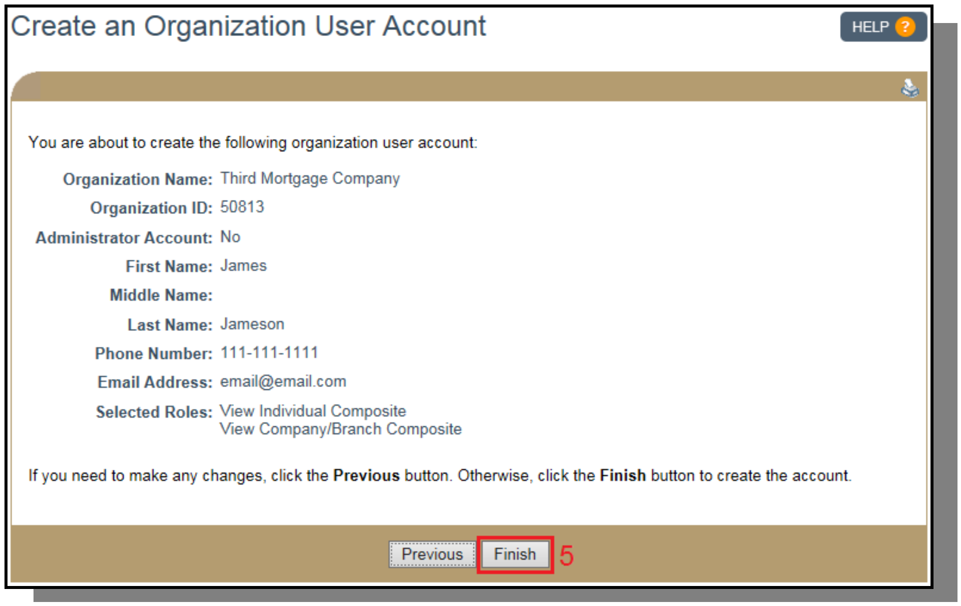

Figure 3: Finish Creating an Organization User

6. The confirmation page will display. User name and password information is sent to the email address provided.

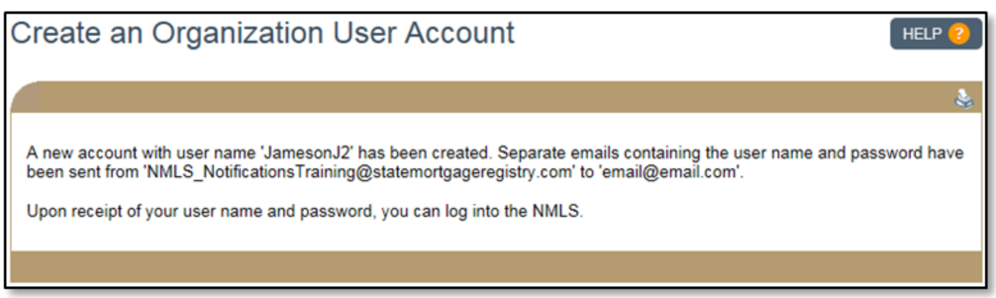

Figure 4: Confirmation – Organization User Created

User Roles for Organization Users

Notifications

- *Manage Notification Contacts* - this role allows another regulator 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.

Composite View

- *View Individual Composite* - this role allows the user to view ALL data associated with an individual record. This includes any MU2 or MU4 filings, the history of their licenses, license items (jurisdiction 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 MU1, or MU3 filings, the history of their licenses, and any license items (jurisdiction requirements or deficiencies) that have been associated with their license.

- *View Federal Information* – this role allows the user to view selected information for federally registered institutions and mortgage loan originators.

- *View Authorized Agent Composite* - this role allows the user to view ALL data associated with an authorized agent and its relationships regardless of where the company is licensed.

- *View Confidential Information* - this role allows the user to view the full social security number and date of birth of any individual that has a license or has been licensed in the regulator's jurisdiction, or any individual that has or had an MU2 association with a licensed or previously licensed company or branch in the regulator's jurisdiction. This includes any Historical Filings and Composite View. This role also allows the user to view the EIN or Tax ID for the company.

- *View Criminal Background Check Result Status* - this role allows the user to view the Criminal History Record Information (CHRI) of any individual that has an active license/registration in the regulator's jurisdiction.

- *View RAP Sheet* - this role allows the user to view the Record of Arrest and Prosecution (RAP Sheet), that was returned by the FBI of any individual that has an active license/registration in the regulator's jurisdiction.

- *View Credit Report Information* - this role allows the user to view an individual's credit report information, including the credit score, summary flags and the full PDF version of any credit report to which the jurisdiction has been given access. A jurisdiction is given access to a credit report when a credit report request is submitted for the individual and that individual is actively licensed or seeking licensure with the jurisdiction.

Tasks

- *Access Work Items* - this role allows the user to have full access to the regulator's work list in order to process any work associated with any sponsorship requests or filings that have been submitted for the company, branch, or individual. It also allows the user to view and manage Advance Change Notices.

- *License Status User* - this role allows the user to manage licenses with certain license status transition rules. A user with this role can request Renewals Reports.

- *License Status Admin* - this role allows the user to manage licenses with all license statuses, without any restrictions (override role). A user with this role can request Renewals Reports.

- *Accounting* - this role allows the user to access fee disbursements and download the report in Excel format.

- *Regulatory Action View Only* - this role allows the user to search and view State Regulatory Actions in read-only mode.

- *Regulatory Action User* - this role allows the user to post and manage State Regulatory Actions without the ability to set the privacy level of the action to be shared (i.e., Public or Private).

- *Regulatory Action Admin* - this role allows the user to post and manage State Regulatory Actions including the ability to set the privacy level of the action to be shared (i.e., Public or Private).

- *Agency Invoices* - this role allows the user to upload and view Agency Fee Invoices for a company or individual entity that has a pending, active, or inactive license in their state.

Downloads

- *Manage Data Downloads* - this role allows the user to access the data that is available for download on a jurisdictional level. Data Download must be activated prior to receiving the data.

Reporting

- *Manage Reports* - this role allows the user to request and view reports. This does not include Renewals Reports.

Renewals

- *Renewals Management* - this role allows the user to manage license renewal requests. This user can also request Renewal Reports.

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 into 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 UserName, 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*).

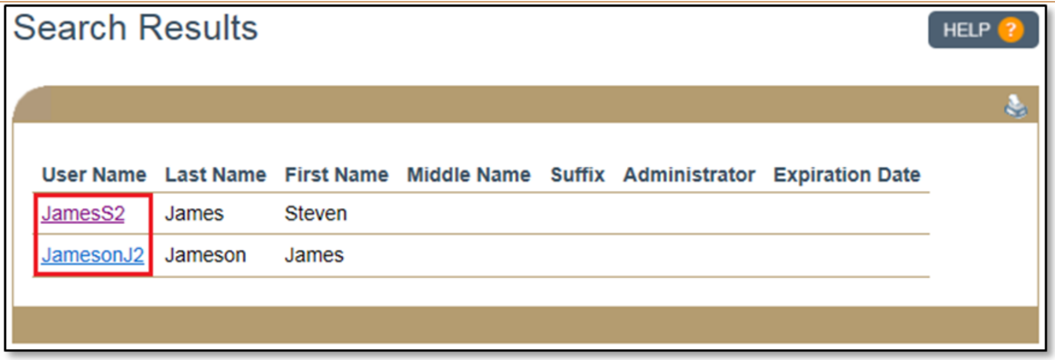

Figure 5: Search Results

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 in to 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 will have to be created by an AA in order 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 (1-866-665-7123).