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Policy

Organization users are employees within an organization who are responsible for performing tasks for the organization, such as creating filings or managing work queues. Selecting all roles does not make the user an Account administrator. A user with all rights in the System will not have the ability to create accounts for other users in their organization.

NOTE: Users with an organization user account and an individual user account will have two or more usernames and passwords. For example, a user may have an individual (MLO) account, a parent organization user account, and a subsidiary organization user account, each with a different login and password.

Individuals – MLOs who need to create filings on their own behalf, or attest to filings created by their institution, subject to self-entitlement process by clicking Request an Account then by completing the Individual form.

NOTE: Individuals must entitle themselves through the self-entitlement process by clicking the Request an Account link on the Login screen, then clicking the Individual button. This includes individual licensees, Control Persons, Qualifying Individuals, and branch managers who need to create filings on their own behalf and/or attest to filings created by their company.

Figure 1: Create Organization User

Definitions and Charts

	Description
Account Administrator	An account administrator for a company has the ability to create and manage user accounts for their organization. The organization appoints a primary and secondary (optional) account administrator during the entitlement process. The organization's account administrator(s) establish accounts with roles and permissions for other users within their organization
Organization User	Organization Users are employees within an organization that are responsible for performing tasks for the organization in NMLS like creating filings or managing work queues.

Figure 2: Sample Table

How to Create an Organization User Account

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 **Next** button (see Figure 3).

Create an Organization User Account

Organization Name: New State Company LLC

Organization ID: 39431

First Name:

Middle Name:

Last Name:

Phone Number: 999-999-9999x9999

Email Address:

Confirm Email Address:

2 Next

Figure 3: Create an Organization User Account

3. Select the checkbox to the left of the desired entitlement(s).
4. Click the **Next** button (see *Figure 4*).

NOTE: Clicking the Previous button displays the prior screen.

Create an Organization User Account

Notifications
☐ Manage Notification Contacts

State Filings
☐ Create and Submit MU1/MU2 Filings
☐ Create and Submit MU3/MU2 Filings
☐ Create and Submit MU4 Filings
☐ Create and Submit Financial Statement Filings
☐ Create and Submit Mortgage Call Report Filings
☐ Edit Mortgage Call Report Financial Condition Filings
☐ View Mortgage Call Report Filings
☐ Manage 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

Renewals
☐ Submit Renewal Requests

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Figure 4: Create an Organization User Account

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

Create an Organization User Account

You are about to create the following organization user account:

Organization Name: New State Company LLC
 Organization ID: 39431
 Administrator Account: No
 First Name: John
 Middle Name:
 Last Name: Clark
 Phone Number: 800-123-1231
 Email Address: John@company.com
 Selected Roles: View Individual Composite
 View Company/Branch Composite

If you need to make any changes, click the **Previous** button. Otherwise, click the **Finish** button to create the account.

Previous Finish **5**

Figure 5: Finish Creating OU

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

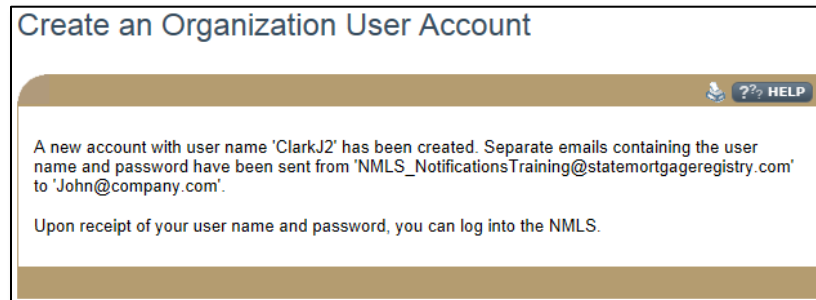


Figure 6: OU Created Confirmation

Additional Resources

- [Information Viewable in NMLS Consumer Access](#)
- [Account Administration for Company Users](#)