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Policy

The *Modify Active Relationship* screen allows a company user to manage the components of their relationship with a particular individual. From this screen, company users can edit the individual employment/association date, add or remove registered locations, add or remove sponsorships or end a relationship with an individual.

An individual must be associated with at least one registered location at a time. A company user must add the new registered location(s) prior to removing a location.

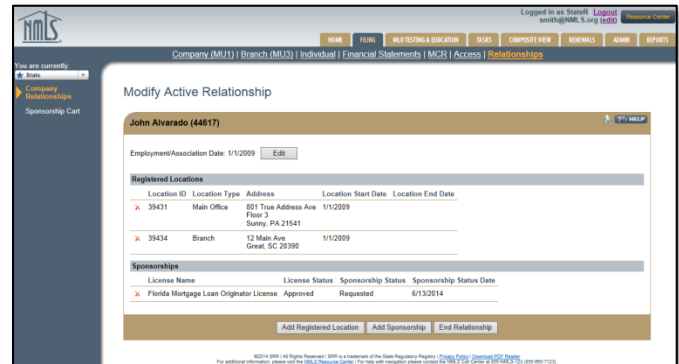


Figure 1: Modify Active Relationship

A company may establish multiple relationships with a single individual in order to satisfy certain state requirements.

Definitions and Charts

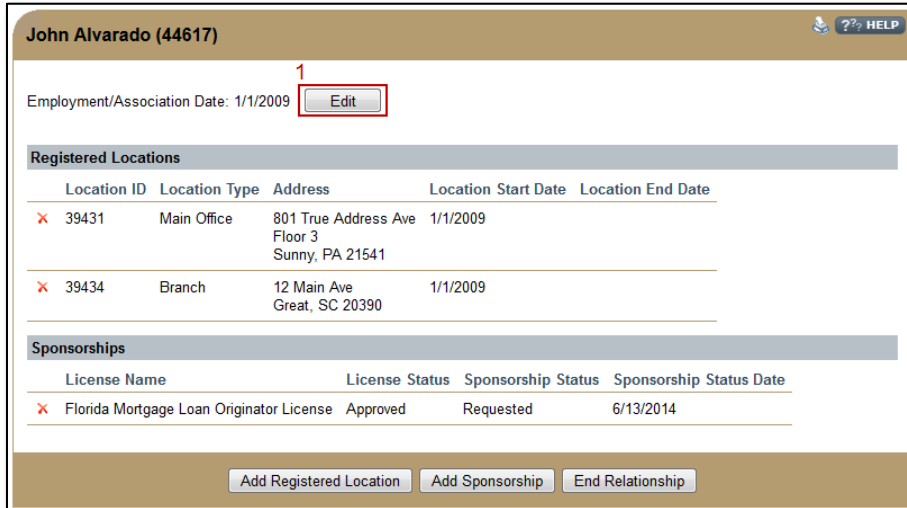
Term	Description
Relationship	A company’s indication that the individual is employed by the company or has a contract to work for the company. It represents the relationship between the company and the individual and does not require approval by a regulator.
Sponsorship	A company’s indication that the individual will conduct business under a specific license/registration for the company. Only a company user may request sponsorship of the individual’s license and the company must already have an established relationship with the individual in the system. License sponsorship must be approved by the regulator.

Figure 2: Key Terms

How to Manage Active Relationship

Edit Employment/Association Date

1. Click the **Edit** button (see *Error! Reference source not found.*).



John Alvarado (44617) HELP

Employment/Association Date: 1/1/2009 **Edit**

Registered Locations

Location ID	Location Type	Address	Location Start Date	Location End Date
✗ 39431	Main Office	801 True Address Ave Floor 3 Sunny, PA 21541	1/1/2009	
✗ 39434	Branch	12 Main Ave Great, SC 20390	1/1/2009	

Sponsorships

License Name	License Status	Sponsorship Status	Sponsorship Status Date
✗ Florida Mortgage Loan Originator License	Approved	Requested	6/13/2014

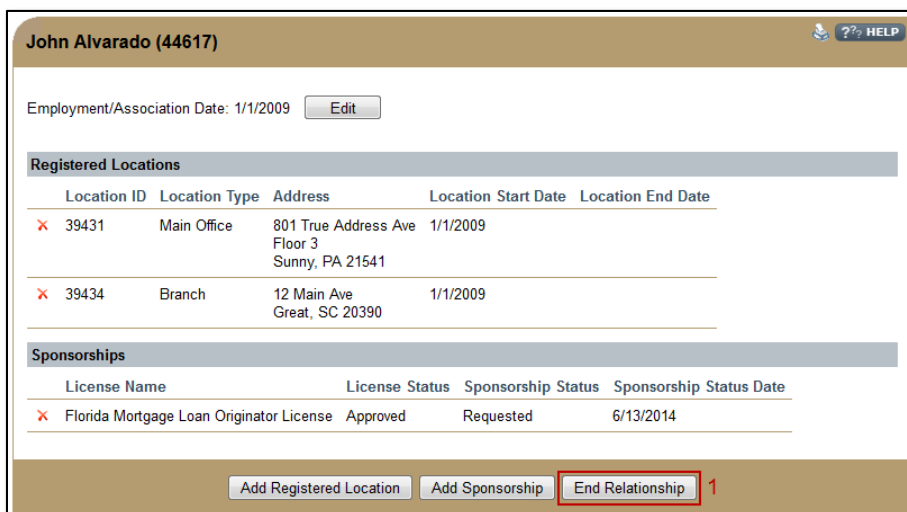
Add Registered Location Add Sponsorship End Relationship

Figure 3: Modify Active Relationship – Edit Employment Date

2. Enter the new Employment/Association Date.
3. Click the **Save** button.

End Relationship

1. Click the **End Relationship** button (see *Figure 4*).



John Alvarado (44617) HELP

Employment/Association Date: 1/1/2009 **Edit**

Registered Locations

Location ID	Location Type	Address	Location Start Date	Location End Date
✗ 39431	Main Office	801 True Address Ave Floor 3 Sunny, PA 21541	1/1/2009	
✗ 39434	Branch	12 Main Ave Great, SC 20390	1/1/2009	

Sponsorships

License Name	License Status	Sponsorship Status	Sponsorship Status Date
✗ Florida Mortgage Loan Originator License	Approved	Requested	6/13/2014

Add Registered Location Add Sponsorship **End Relationship**

Figure 4: Modify Relationship - End Relationship

2. Complete appropriate data fields.

NOTE: *Explanation for Ending* is an optional field. The *Deceased Date* should only be entered if Reason for Ending is “Deceased”.

3. Click the **End Relationship** button (see *Figure 5*).

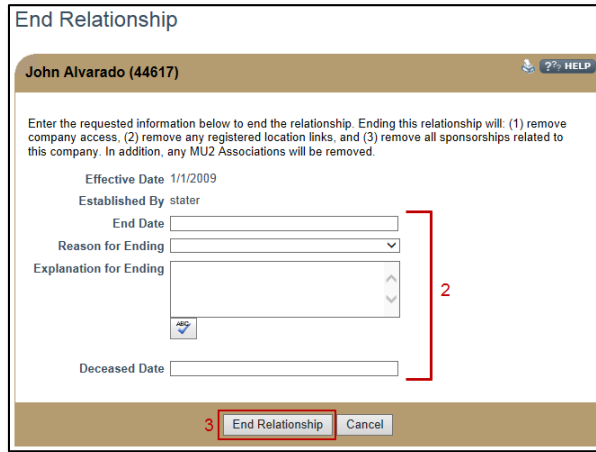


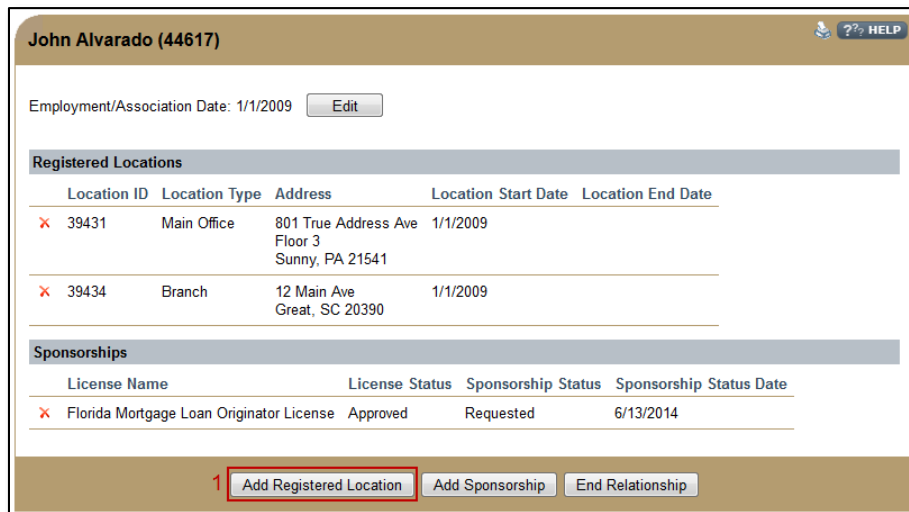
Figure 5: End Relationship

4. Click the **End Relationship** button.

How to Manage Registered Locations

Add Registered Location

1. Click the **Add Registered Location** button (see *Figure 6*).



Location ID	Location Type	Address	Location Start Date	Location End Date
<input checked="" type="checkbox"/> 39431	Main Office	801 True Address Ave Floor 3 Sunny, PA 21541	1/1/2009	
<input checked="" type="checkbox"/> 39434	Branch	12 Main Ave Great, SC 20390	1/1/2009	

License Name	License Status	Sponsorship Status	Sponsorship Status Date
<input checked="" type="checkbox"/> Florida Mortgage Loan Originator License	Approved	Requested	6/13/2014


Figure 6: Modify Active Relationship - Add Registered Location

2. Enter the Start Date and select the checkbox(es) next to the registered location to be added.

- Click the **Add Location** button (see *Figure 7*).



Add Registered Location

John Alvarado (44617)  **HELP**

Identify the location(s) where this individual works. If the appropriate location is not available, you should submit a Company Form (MU1) or Branch Form (MU3) for the location prior to performing this action. The Start Date should reflect the date the individual started working at the selected location(s).

Start Date:

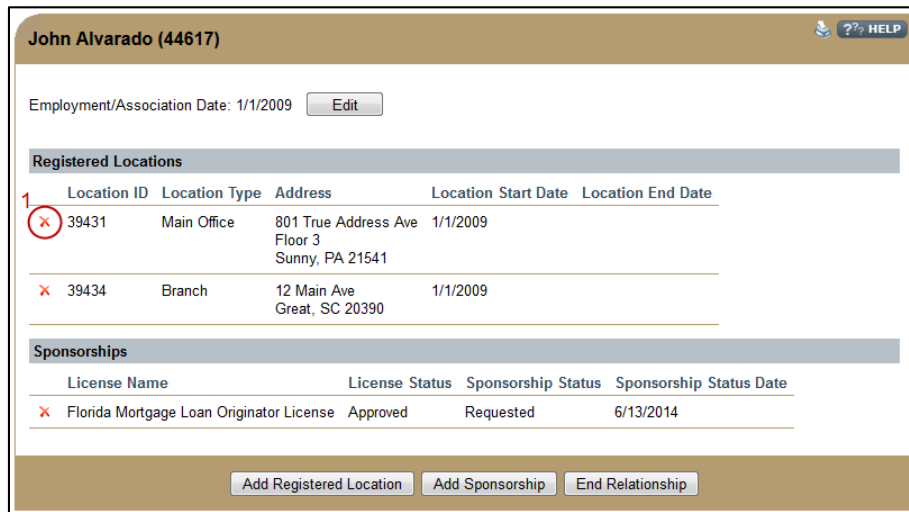
Location ID	Location Type	Address
<input type="checkbox"/> 39516	Branch	12 Haven Street Silver Spring, ID 09022

3

Figure 7: Add Registered Location

Remove Registered Location

- Click the **Remove** icon next to the registered location to be removed (see *Figure 8*).



John Alvarado (44617)  **HELP**

Employment/Association Date: 1/1/2009

Registered Locations

Location ID	Location Type	Address	Location Start Date	Location End Date
<input checked="" type="checkbox"/> 39431	Main Office	801 True Address Ave Floor 3 Sunny, PA 21541	1/1/2009	
<input checked="" type="checkbox"/> 39434	Branch	12 Main Ave Great, SC 20390	1/1/2009	

Sponsorships

License Name	License Status	Sponsorship Status	Sponsorship Status Date
<input checked="" type="checkbox"/> Florida Mortgage Loan Originator License	Approved	Requested	6/13/2014

Figure 8: Modify Active Relationship – Remove Registered Location

- Enter the *End Date* and select the checkbox next to the registered location to be removed.
- Click the **Remove Location** button.

How to Manage Sponsorships

Add Sponsorship

1. Click the **Add Sponsorship** button (see *Figure 9*).



Figure 9: Modify Active Relationship – Add Sponsorship

2. Select the checkbox next to the license(s)/registration(s) to be sponsored.
3. Click the **Add to Cart** button.
4. Click the **Proceed to Invoice** button (see *Figure 4*).

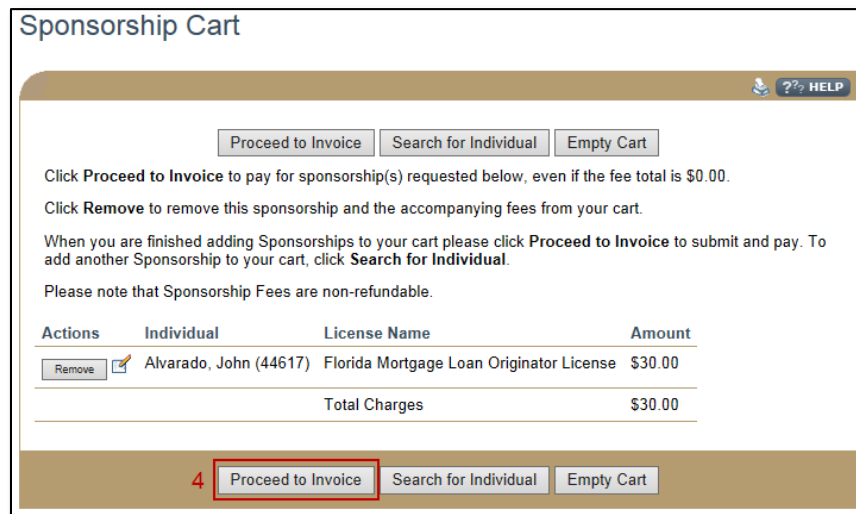


Figure 4: Sponsorship Cart

5. Click the **Pay Invoice** button.

Remove Sponsorship

1. Click the **Remove** icon next to the license name to be removed (see *Figure 5*).

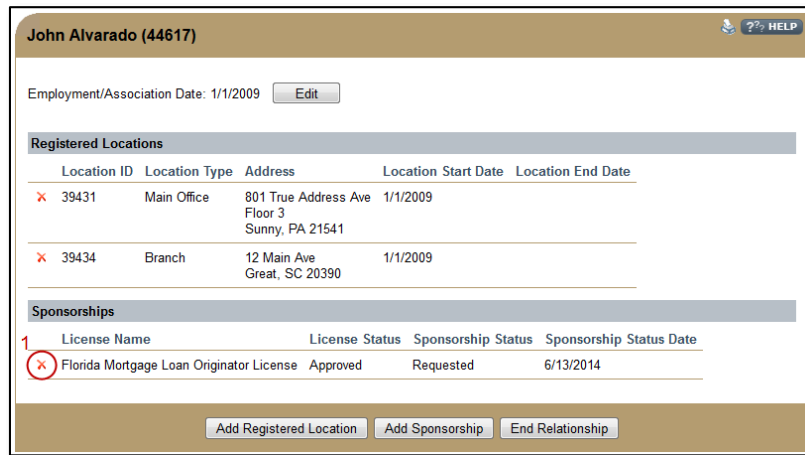


Figure 5: Add Registered Location

2. Click the **Remove Sponsorship** button.

Additional Resources

- [Information Viewable in NMLS Consumer Access](#)
- [Create Relationships & Sponsorships](#)
- [Amending Registered Locations](#)
- [Ending Relationships & Sponsorships](#)