Menu

Policy

Organization Users (OUs) are employees within an organization who are responsible for performing tasks on behalf of their organization, such as creating filings or managing work queues. Selecting all roles does not make the user an Account Administrator (AA). 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 OU account and an individual user account 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 OU 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.
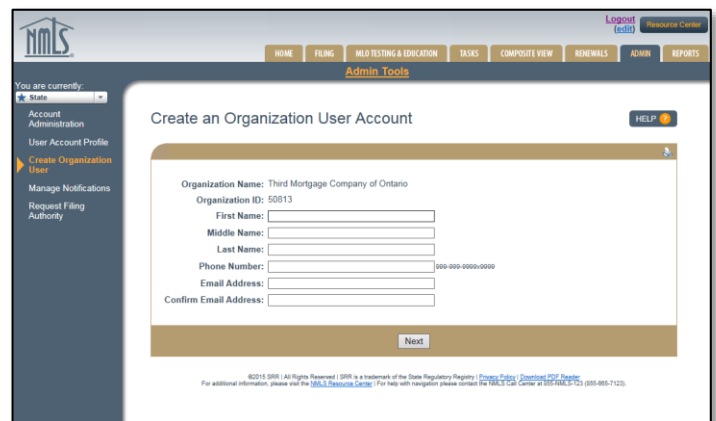

Figure 1: Create Organization User

Definitions and Charts

	Description
Account Administrator	An Account Administrator (AA) for a company has the ability to create and manage user accounts for their organization. The organization appoints a primary and secondary (optional) AA during the entitlement process. The organization's AA(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 the **Next** button (see *Figure 3*).

Figure 3: 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 4*).

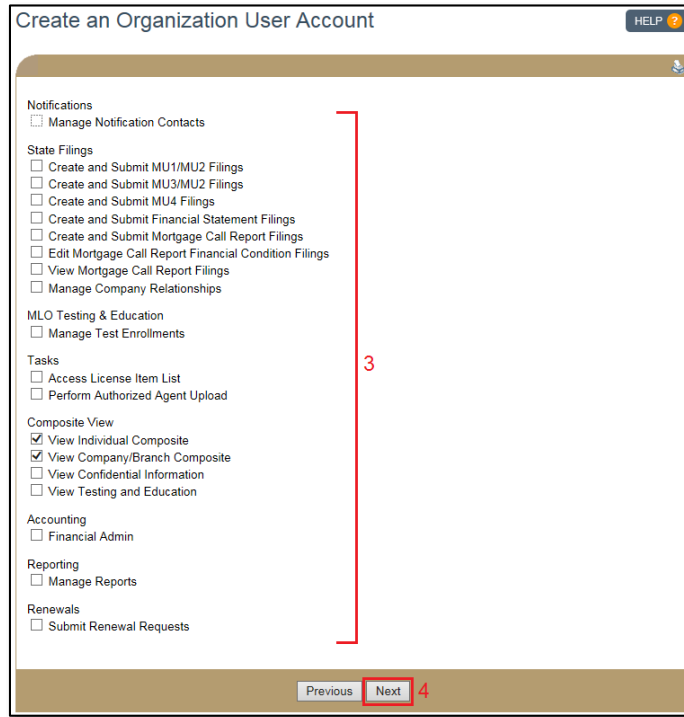   **NOTE**: Clicking the Previous button displays the prior screen.

Figure 4: Create an Organization User Account

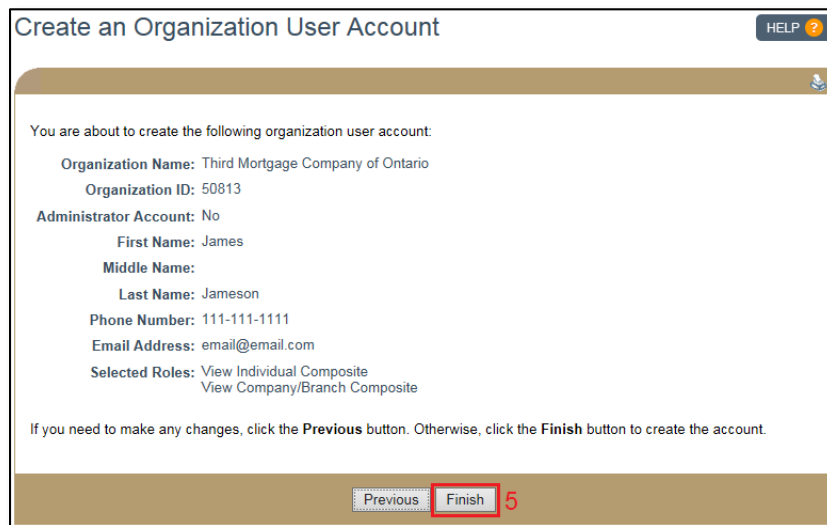5. Click the **Finish** button (see *Figure 5*).

Figure 5: Finish Creating OU

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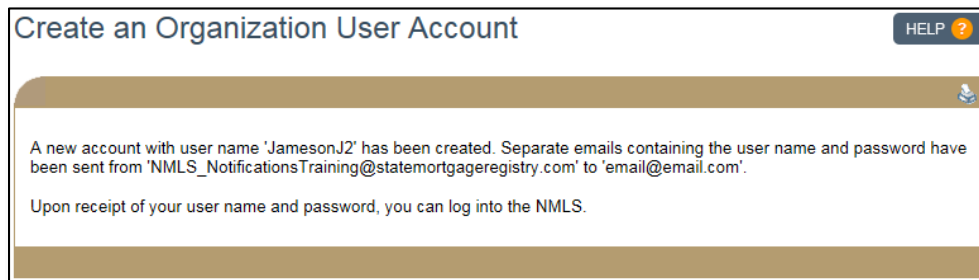

Figure 6: OU Created Confirmation

Additional Resources

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