



CREATING AN INSTITUTION USER ACCOUNT

Only *Account Administrators* can create *Institution Users* with access to the institution's NMLS record and the ability to perform assigned tasks on behalf of the Institution. Company and Institution users are also referred to as Organization Users.

Creating an Institution User Account:

1. Navigate to the [**NMLS Federal Registry Resource Center**](#).
2. Select  in the upper right corner.
3. Select the appropriate context: State: Non-depository or Federal, if applicable, and Log into NMLS.
4. Select  in the top right corner.
5. Select **Create Organization User** on the left navigation panel.
6. Enter the user's first name, last name, phone number, and their email address twice. This email address must be correct as it will be used as a method of contact by the system.
7. Click **Next**.
8. Select the appropriate role(s) required for the user to perform their job responsibilities in NMLS (see [**Description of Institution Roles**](#) below).

NOTE: Selecting all boxes does not make the user an Account Administrator. A user with all rights in the system still does not have the ability to create other institution users.

9. Click **Next** to proceed or **Previous** to return to the data entry screen.
10. Review the user information and click **Finish** to complete the process of creating the user account or **Previous** to change a role prior to completing the task.

NOTE: Emails with the username, temporary password, and assigned roles will be sent to the newly created user at the email address provided when the user was created.

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

Description of Institution User Roles

Notifications

- Manage Notification Contacts - this role allows an institution 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. *Please note that if no user is assigned to receive the notification, the notification is sent to the Account Administrator(s).*

Federal Filings

- Create and Submit MU1R filings - this role allows the user to create, edit, view and submit to the system the MU1R (institution application). This includes those created by other users within the institution.
- Create and Submit MU4R filings - this role allows the user to create, edit, view and submit to the system the MU4R (individual application) for any individual associated with the institution. This includes those created by other users within the institution.
- Pay MU4R Fees - this role allows the user to pay fees associated with MU4R filings submitted by the user.
- View MLO Record Access - this role gives the user the ability to view the list of MLOs to which the institution currently has access.

Tasks

- Perform MLO Batch Upload - this role allows the user to initiate the registration process for multiple MLOs in bulk. This includes the creation of the individual base record, individual user account and pending MU4R filing.
- Manage Employment Records - this role allows the user to manage employments established with their institution, including the ability to confirm, reject, request corrections and terminate such employments.
- Pay MU4R Fees - this role allows the user to pay fees associated with MU4R filings.

Composite View

- View Individual Composite - this role allows the user to view data associated with an individual record to which the institutions has access. This includes historical MU4R filings, registration status history, and criminal background check information for the individual. It does not allow a user to see data requiring the view confidential information role.
- View Institution Composite - this role allows the user to view ALL data associated with an institution. This includes any historical MU1R filings, and their MU1R filing status history.
- 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 institution.
- View CBC Result - this role allows the user to view the information resulting from a Criminal Background Check for MLOs associated with the institution. Only employees or authorized representatives of a federally chartered or insured institution may have access to view the Criminal Background Check results in NMLS. Employees of an institution's subsidiaries cannot have access to Criminal Background Check results.