



ACCOUNT ADMINISTRATION FOR FEDERAL USERS

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.

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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*).

Create an Organization User Account

HELP ?

Organization Name: Third Mortgage Company

Organization ID: 50813

First Name:

Middle Name:

Last Name:

Phone Number: 000-000-0000x0000

Email Address:

Confirm Email Address:

2 Next

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.

The screenshot shows a web interface titled "Create an Organization User Account" with a "HELP" button in the top right. The main content area lists several categories of roles with checkboxes:

- Notifications
 - ☐ Manage Notification Contacts
- Federal Filings
 - ☐ Create and Submit MU1R Filings
 - ☐ Create and Submit MU4R Filings
 - ☐ Pay MU4R Fees
 - ☐ View MLO Record Access
- Tasks
 - ☐ Perform MLO Batch Upload
 - ☐ Manage Employment Records
 - ☐ Pay MU4R Fees
- Composite View
 - ☒ View Individual Composite
 - ☒ View Institution Composite
 - ☐ View Confidential Information
 - ☐ View CBC Result
 - ☐ View RAP Sheet
- Accounting
 - ☐ Financial Admin
- Reporting (Federal Registry)
 - ☐ Manage Reports
- Federal Renewals
 - ☐ Federal Renewals

A red bracket labeled "3" spans the list of categories. At the bottom, there are "Previous" and "Next" buttons, with the "Next" button highlighted by a red box labeled "4".

Figure 2: Create an Organization User Account - Roles

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

The screenshot shows the same web interface, but now it displays the account details for the user being created:

You are about to create the following organization user account:

- Organization Name: Third Mortgage Company
- Organization ID: 50813
- Administrator Account: No
- First Name: James
- Middle Name:
- Last Name: Jameson
- Phone Number: 111-111-1111
- Email Address: email@email.com
- Selected Roles: View Individual Composite, View Company/Branch Composite

At the bottom, there is a message: "If you need to make any changes, click the Previous button. Otherwise, click the Finish button to create the account." Below this message are "Previous" and "Finish" buttons, with the "Finish" button highlighted by a red box labeled "5".

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.

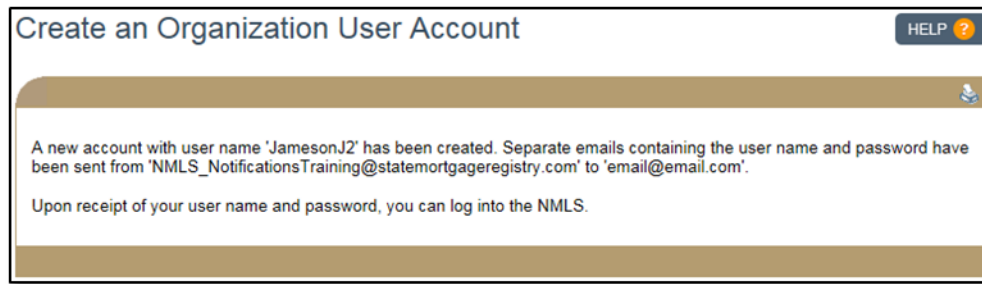


Figure 4: Confirmation – Organization User Created

User Roles for Organization Users

Notifications

- *Manage Notification Contacts* - this role allows an OU to 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 AAs.*

Federal Filings

- *Create and Submit MU1R Filings* - this role allows the user to create, edit, view, and submit to the System the MU1R (institution) filing. 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) filing 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 they submitted.
- *View MLO Record Access* - this role gives the user the ability to view the list of mortgage loan originators (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 MLO's base record, individual user account, and pending MU4R filing. This role also allows users to view personal identification information provided in the Batch Upload .csv files. The Perform MLO Batch Upload role also allows users to perform Merger & Acquisition operations.
- *Manage Employment Records* - this role allows the user to confirm, reject, request corrections to, and terminate employment records associated with their institution.
- *Pay MU4R Fees* - this role allows the user to pay fees associated with MU4R filings submitted by other users within the institution.

Composite View

- *View Individual Composite* - this role allows the user to view data associated with an individual record to which the institution has access. This includes historical MU4R filings, registration status history, and criminal background check (CBC) 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 any individual to which the institution has access.
- *View CBC Result* - this role allows the user to view the information resulting from a CBC for MLOs that have a pending or active employment record with the institution.
- *View RAP Sheet* - this role allows the user to view the Record of Arrest and Prosecution Sheet for MLOs that have a pending or active employment record with the institution.

Accounting

- *Financial Admin* - this role allows the user to view all payments made in NMLS for the institution. In addition, it allows the user to repay failed payments.

Reporting

- *Manage Reports* - this role allows the user to request and view reports.

Federal Renewals

- *Federal Renewals* - this role allows the user to submit renewal requests for the institution and employed individual registrations.

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, Federal, 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*).

Search Results							HELP ?
User Name	Last Name	First Name	Middle Name	Suffix	Administrator	Expiration Date	
JamesS2	James	Steven					
JamesonJ2	Jameson	James					

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 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.

How to De-Register a VIP Subscription Credential

Account administrators can de-register an organization user's VIP Subscription credential.

1. From the *User Account Profile* page, click **Delete** under the *VIP Subscription* section.

RESULT: The next time the user logs in to NMLS, they are prompted to register a new credential.

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