MANAGING INSTITUTION USER ACCOUNTS

Institution Account Administrators (AAs) are responsible for managing NMLS accounts of users associated with their institution. AAs can create accounts, manage roles, modify accounts, enable/disable accounts, delete accounts, and de-register VIP subscription credentials for other institution users. Account Administration Streamlining has incorporated many of these functions into a single section.

Getting Started Managing User Accounts:

1. Navigate to the **NMLS Federal Registry Resource Center**.
2. Click **Log in to NMLS** in the upper right corner.
3. If prompted, select the appropriate context, Federal, and Log in to NMLS.
4. Select the **Admin** tab in the top right corner.
5. Click **User Account Profiles** on the left navigation panel.
6. Enter the individual's User Name, First and 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.

Managing Roles:

1. From the *User Account Profiles* page, click the **Manage Roles** button to the right of the *User Roles* section header.
2. Make updates to the user role(s) by checking or unchecking the box next to the role(s) as necessary.
3. Click **Save** to save the updates or **Cancel** to return to the *User Account Profile.*

   NOTE: If an AA adds or removes a role from an institution user that is currently logged into NMLS, the role changes will not take effect until the user logs out and logs in again.

Roles Summary:

Confidential Information – this role allows users to view social security numbers, EIN values, and date of birth information.

Federal Renewal – this role allows users to submit renewals for an institution and employed individual registrations.

Federal Reports – this role allows users to view and generate Federal company reports. This does not include Renewals reports.

Financial Administration – this role allows users to pay for funds deficiencies and view payment history.

Individual Composite – this role allows users to view individual composite information.

Institution Composite – this role allows users to view Institution composite information.

Manage Institution Employments – this role allows institutions to manage individual employments.

MLO Upload – this role allows institutions to submit an upload file containing MLO records to create new individual accounts and/or pending MU4R filings.

MU1R – this role allows users to create and submit an MU1R form.

MU4R – this role allows users to create and submit an MU4R form.

MU4R Payment Admin – this role allows users to view and generate company reports. Does not include Renewals reports.

MU4R Payment – this role allows users to pay for MU4R fees incurred by a user-submitted filing.

Notifications Admin – this role allows users to manage notification contacts.

View CHRI Indicator – this role allows users to view CHRI for criminal background check results.

View Individual Institution Access – this role allows users to view a list of individuals which the organization can access.

View RAP Sheet – this role allows users to view CHRI for criminal background check results and view RAP sheets.

Modifying a User Account:

The following information for any institution user can be modified by an AA:

- First Name
- Middle Name
- Last Name
- Phone Number
- Email Address

1. From the *User Account Profiles* 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*.

Enabling/Disabling an Account:

A user whose account has been disabled by an AA will not be able to log into 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 Profiles* page, click **Disable** or **Enable** under the *User Account Information* section.

    NOTE: Click **New Search** to return to the *User Account Search* screen.

Deleting 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 Profiles* page, click **Delete Account** under the *User Account Information* section.

2. Click **OK** to confirm deletion of the user account.

De-Registering 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, contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123)