



COMPANY RENEWAL ROLES

To renew licenses for the company, branch, and sponsored individuals, Account Administrators may need to grant company users an additional user role to access the Renewal tab. Account Administrators are able to grant roles using the steps below.

Granting Existing Company Organization Users the Renewal Role in NMLS

1. From the NMLS Resource Center, click the [Log in to NMLS](#) button.
2. Click the **Admin** tab.
3. Click the **User Account Profile** link on the left navigation panel.
4. Click the **Search** button, without providing search criteria.
5. From the list of company users, click the **User Name** of the user you would like to edit.
6. To access and assign new user roles, click the **Manage Roles** button.

User Roles 6 **Manage Roles**

Assigned Role(s): View Testing and Education

Unassigned Role(s): Manage Notification Contacts, Create and Submit MU1/MU2 Filings, Create and Submit MU3/MU2 Filings, Create and Submit MU4 Filings, Create and Submit Financial Statement Filings, Create and Submit Mortgage Call Report Filings, Edit Mortgage Call Report Financial Condition Filings, View Mortgage Call Report Filings, Manage Company Relationships, Manage Test Enrollments, Access License Item List, Perform Authorized Agent Upload, View Individual Composite, View Company/Branch Composite, View Confidential Information, Financial Admin, Manage Reports, Submit Renewal Requests

7. Select the checkbox next to *Submit Renewal Requests* to assign the role to the user.
8. Click the **Save** button.

Composite View

- View Individual Composite
- View Company/Branch Composite
- View Confidential Information
- View Testing and Education

Accounting

- Financial Admin

Reporting

- Manage Reports

Renewals

- 7 Submit Renewal Requests

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Create New Company Organization Users

1. From the NMLS Resource Center, click the [Log in to NMLS](#) button.
2. Click the **Admin** tab.
3. Click the **Create Organization User** on the left navigation panel.
4. Enter the user's name, phone number, and email address.
5. Click the **Next** button.
6. Determine the roles the user will need by selecting the appropriate checkboxes.
7. Click the **Next** button.

NOTE: If this Organization User will be responsible for renewals in NMLS, make sure to select the Submit Renewal Requests role under Renewals (see screenshot on page 1).

8. A confirmation screen appears. Once all information is confirmed, click the **Finish** button.
9. The System sends two emails to the new Organization User, one with a user name, and the other with a temporary password. Users are prompted to create a personal password after logging in with the temporary password.

Additional information regarding user roles and the administrative functions can be found in the [Account Administration Navigation Guide](#).

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