

How to Manage your own users in mimbroker.com

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1) Purpose of this document

This document is set to provide you with the instructions and guidance you need to get started managing your own users.

Upon getting approved / Recertified with MIM you should designate one person in your organization to be the ADMIN on the account. Right now we only have the ability to have one admin.

Responsibility of the Admin

- Add / maintaining Loan Officers in the Portal (Including NMLS and State Licenses)
- Add Processors
- Ensuring the Access levels are correct
- Resetting Passwords (Users can always use the Forgot Password link on if their account has not yet expired)
- Disabling User Accounts

In order for your loans to flow quickly and efficiently into processing all Loan Officers that will be on the 1003 must have an account setup in our Portal. If the Loan Officer is not in our portal it will only delay the opening and processing of your loan.

Mid-Island recommends that each Calendar Quarter Admins review all of the accounts that have access and review and update any and all NMLS / State Licenses.

If you need any assistance with this or do not know who has this permission within your company please contact your Account Executive.

2) Understanding Roles / Loan Access / Permissions

Roles

Roles are simply the roles the user will hold within our portal. A user must have a minimum of one role assigned to their account but is not limited to the number of roles it can hold.

- [Loan Officer Role](#) - This role should be given to any account that is an Active & Licensed Loan Officer for your company. When a user holds this role you must enter their NMLS number as well as any State Licenses they hold.
- [Processor Role](#) - This role should be given to any account that is working as processor for your organization.
- [Secondary](#) – This role should not be used at this time
- [Post Closer](#) – This role should not be used at this time

Loan Access

Loan Access levels enable you to choose which loans the user is able to see. When a Loan Officer Uploads a loan to the portal they are automatically assigned to the loan as the Loan Officer. When a Processor uploads a loan to the portal they are automatically assigned as the External Processor on the loan. *Loans uploaded by a processor will need to have a Loan Officer Assigned prior to submitting the Loan to us.

- [Corporate – within company](#) – Users with this Access level will be able to view all loans within your company even if they are not assigned to the loan.
- [Individual – only if assigned](#) – Users with this Access Level will only see a loan if they are assigned as either the Loan Officer and/or Processor.

Permissions

Permission levels let you assign specific permissions to specific users. Currently there are only two permission levels.

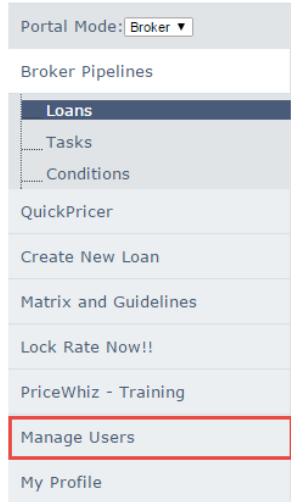
- [Allow viewing wholesale channel loans](#) – Users with this permission enabled will be able to view wholesale loans. If they do not have this permission, they will not be able to access any loans.

- [Allow creating wholesale channel loans](#) – Users with this permission enabled will be able to create wholesale loans. If the user does not have this permission they will not be able to create new loans.

3) Navigating to & Understanding the Manage Users Page

Navigate to the Manage Users Page

To Navigate to the Manage Users page you will want to Click the Manage Users Link on the left side of the page.



Understanding the Manage Users Page

Manage Users

Name or Login: Search

	Login	User Name	Roles	Can Create New Loans?	Status
edit	dduck11	Daisy Duck	Loan Officer, Processor	Yes - Wholesale	Inactive
edit	dduck	Donald Duck	Loan Officer, Processor	Yes - Wholesale	Active
edit	gloanofficer	Greg Loanofficer	Loan Officer	Yes - Wholesale	Active
edit	mloanofficer	Mike Loanofficer	Loan Officer	Yes - Wholesale	Active
edit	oneproc	One Processor	Processor	Yes - Wholesale	Inactive
edit	sloanofficer	Sallie Loanofficer	Loan Officer	Yes - Wholesale	Active

- 1) Add New – Allows you to add new users
- 2) Edit – Allows you to edit an existing user
- 3) Can Create New Loans? – Shows you if the user has the permission to create new loans or not.
- 4) Status – Shows the status of the user (Active / Inactive)
- 5) Roles – Shows all of the Roles activated for that user

4) Adding a new User


To add a new user, you will want to click on the “Add New” button on the top of the Manage Users Page.

Manage Users

Name or Login: Search **Add New** View Users

Login	User Name ^	Roles
edit dduck11	Daisy Duck	Loan Officer, Processor


You will be displayed the Add New User Page. You will want to navigate through every tab on this page.

User Information – Enter all of the information specific for this user. Anything with a  is a required field.


Add New User

User Information Credentials Roles, Loan Access, & Permissions Broker Relationships Licenses System Access

Name

First Name 


Middle Name

Last Name 

Suffix

Name on Loan Documents Modify


Contact Info

Phone 

Fax

Cell Phone

Pager

Email 

Send task-related e-mail


Warning: This user does not currently have permission to view loans in any channel available to your company.
Warning: This user does not currently have permission to create loans in any channel available to your company.

OK Cancel Apply

Click OK when you have completed the data entry.

Credentials – Enter a login and password for this user.

Add New User

User Information	Credentials	Roles, Loan Access, & Permissions	Broker Relationships	Licenses	System Access
Login Info					
Login Name					
Password (show rules)					
Retype					
<input checked="" type="radio"/> Must change password at next login					
<input type="radio"/> Password never expires					
<input type="radio"/> Password expires on <input type="text" value=""/> 					
<input type="checkbox"/> Expire passwords every <input type="text" value="15"/> days following update					
Status					
<input checked="" type="radio"/> Active					
<input type="radio"/> Inactive					

Minimum Password Requirements

- Password must have a minimum of 6 characters
- Password must contain at least one numeric and one alphabetic character
- Password cannot contain first name, last name or login name
- Password cannot contain 3 identical characters in a row (Example AAAsample1, sample111)
- Password cannot contain 3 consecutive alphabetical or numeric characters in a row (Example: sampleABC, MNOSample, sampleOPO)
- Password cannot be the same as the previous password
- Passwords can only contain safe characters. Not Allowed: < > “ ‘ % ;) (& + - =

You can always come back to this page to reset a user’s password if they forgot it or if it expired.

If you want to De-Activate a user account, you click the “Inactive” button for that specific user.

Roles / Loan Access / Permissions

Check off the Roles this user will hold. If the user will hold the “Loan Officer” role then you must complete the Licenses tab.

Select the Loan Access Level you want the user to have.

- [Corporate – within company](#) – Users with this Access level will be able to view all loans within your company even if they are not assigned to the loan.
- [Individual – only if assigned](#) – Users with this Access Level will only see a loan if they are assigned as either the Loan Officer and/or Processor.

Select the Permissions you want the user to have.

- [Allow viewing wholesale channel loans](#) – Users with this permission enabled will be able to view wholesale loans. If they do not have this permission, they will not be able to access any loans.

- [Allow creating wholesale channel loans](#) – Users with this permission enabled will be able to create wholesale loans. If the user does not have this permission, they will not be able to create new loans.

User Information	Credentials	Roles, Loan Access, & Permissions	Broker Relationships	Licenses	System Access
Roles					
<input checked="" type="checkbox"/> Loan Officer					
<input type="checkbox"/> Processor					
<input type="checkbox"/> Secondary					
<input type="checkbox"/> Post-Closer					
Loan Access Level					
<input type="radio"/> Corporate - within company					
<input checked="" type="radio"/> Individual - only if assigned					
Permissions					
<input checked="" type="checkbox"/> Allow viewing wholesale channel loans.					
<input checked="" type="checkbox"/> Allow creating wholesale channel loans.					

Licenses

This screen should only be filled out if the user is a Loan Officer. You will need to enter the Loan Officers NMLS # as well as add any State Licenses the Loan Officer Has.

If the Loan Officer has a License in a state that does not Provide a License Number, then please enter "NONE" as the License #. In addition, please take note of the Expiration Date. If at any point in time our system detects a loan officer that has an expired state license you will not be able to proceed until you update the state license number.

User Information	Credentials	Roles, Loan Access, & Permissions	Broker Relationships	Licenses	System Access
Nationwide Mortgage Licensing System and Registry					
Loan Originator NMLS ID <input type="text" value="99999"/>					
State Licenses					
<input type="button" value="Add License"/>					
License #		State	Expiration Date		
<input type="text" value="NONE"/>		NY ▼	<input type="text" value="12/31/2016"/>	remove	
<input type="text" value="MLO99999"/>		MA ▼	<input type="text" value="12/31/2015"/> expired	remove	

Broker Relationships / System Access

These two tabs are for information only and should not be used.