# MYGINNIEMAE FULL RELEASE KICKOFF CALL

January 14, 2020

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**MyGinnieMae** is a single gateway to all Ginnie Mae's systems, applications, and resources, that boosts efficiency for our business partners. The portal provides **enhanced security** and a **single entry-point** to all approved applications for individual users, as well as a seamless user registration and access request process for both the user and the approving authority. MyGinnieMae delivers security features which Ginnie Mae established to specifically address business constraints, security concerns, and compliance issues that hinder GMEP 1.0 today.

> **Use one username and one password to access all Ginnie Mae systems, including Ginnie*NET* and GMEP 1.0**

# MGM **INTRO**

**Most new users** to MyGinnieMae will log into the portal to continue access legacy systems that have yet to modernized and remain unchanged. However, Multifamily Issuers will have access to the new **Multifamily Pool Delivery Module (MFPDM)** for issuing and maintaining pools. See the Release and Training Schedule for training dates on this new application. **Document Custodians** will continue to complete their business activities in Ginnie*NET*.

Single Family Pool Delivery Module (SFPDM) and MISMO are not included in this release of MyGinnieMae.

# MGM **ORG ADMINS**

**Organization Administrators** are **privileged users who control system access**, assign functional roles, and perform other user management activities. These individuals are responsible for ensuring that End Users at their respective organizations are provided the appropriate level of access for their business role with Ginnie Mae. They were formerly known as Security Officers and Enrollment Administrators.

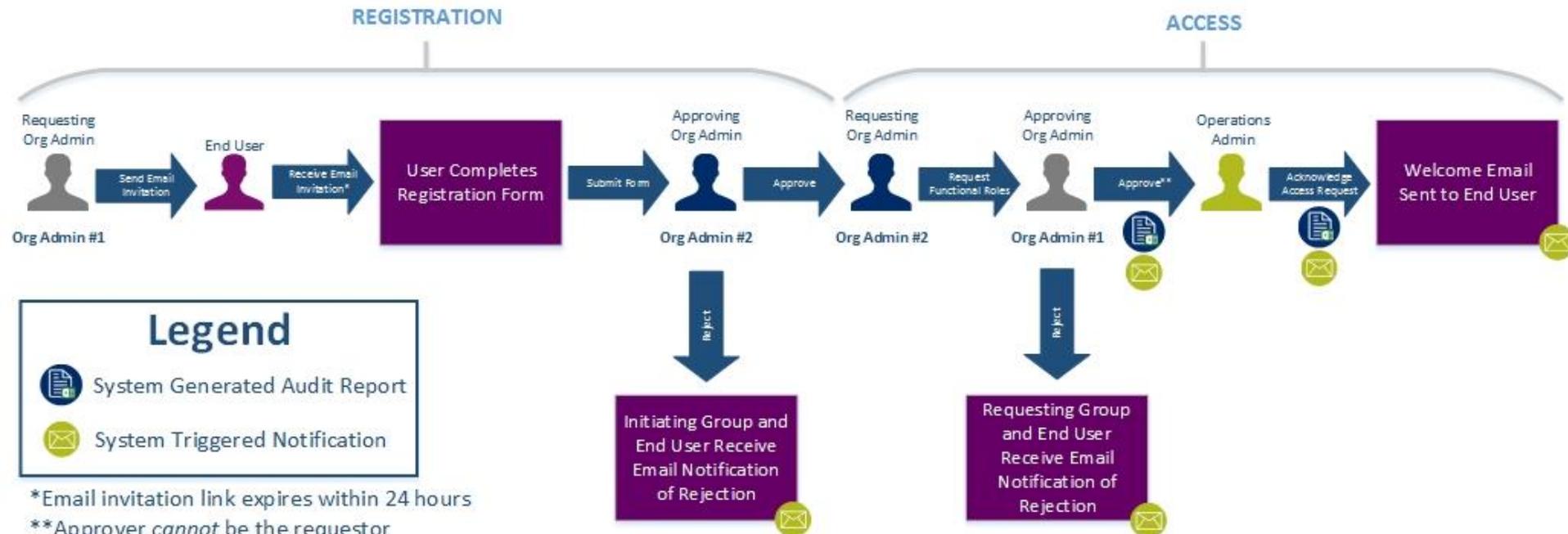| User Type | Responsibility / Description |
|---|---|
| Operations Administrator | Operations Administrators have general oversight of the Portal. They can only provide final acknowledgement of access requests and cannot make any changes to end user accounts. This function is provided by BNYM Operations on behalf of Ginnie Mae, with Ginnie Mae Information Security serving as the Super Administrator over the entire system. |
| Organization Administrator | Organization Administrators have the privilege to invite end users to register for a Portal account, approve user registration, initiate access request via functional role assignment to user and approve the access request within a single organization<br><br>Note: Separation of duties within the registration and access request workflows does not allow the Organization Administrator to initiate a registration and approve that same registration nor request access via functional role assignment and approve that same access request. A minimum of two Org Admins are required and it is recommended to have more than the minimum from an operational perspective. |
| End User | End Users are the various types of Ginnie Mae employees, business partners, and contractors who require access to the business applications and information within the Portal, including various self-service functions. |

# MGM **END USERS**

**End Users** are provided **access based on their business activities** which are organized into meaningful access profiles called **Functional Roles**. Use of Functional Roles ensures users have appropriate level of access in relation to their job functions/responsibilities, enforces the least privilege principle, and makes the account provisioning/de-provisioning actions easier for Organization Administrators. These roles are grouped and vary by type (Single Family, Multi-Family, HECM, etc.).

| Role Name | Role Description |
|---|---|
| SF-Loan Delivery and Pooling Basic User | Upload/enter pool and loan information for delivery; verify availability of commitment authority; clear document deficiencies and pooling exceptions; access to prepare but not execute PIIT/TAI transactions. |
| SF-Loan Delivery and Pooling Authorized Signer | Only for HUD 11702 signatories. All rights of a Loan Delivery and Pooling Basic User, plus; authority to submit pools for issuance, request additional commitment authority and execute PIIT/TAI transactions |
| MF-Investor Reporting Basic User | Submit monthly pool and loan level accounting data; submit quarterly custodial account verification data; review monthly remittance information, review monthly reporting exception feedback and errors. |
| MF-Investor Reporting Authorized Signer | Only for HUD 11702 signatories. All rights of an Investor Reporting Basic User, plus; authority to certify the monthly pool and loan accounting report; submit edits needed to clear exception feedback and monthly reporting errors. |
| HECM-Compliance and Oversight User | Review portfolio servicing and investor reporting metrics and reports; oversee subservicer performance when applicable. |
| SS-Investor Reporting Basic User | Submit monthly pool and loan level accounting data; submit quarterly custodial account verification data; review monthly remittance information, review monthly reporting exception feedback and errors |

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# MGM **WORKFLOW**

## MyGinnieMae Onboarding Workflow:

- **Registration Workflow** – creates a portal account which allows the user to login to MyGinnieMae.

- **Access Workflow** – assigns functional role(s) and provides the user access to business applications.



**REGISTRATION**

**ACCESS**

Requesting Org Admin
End User
User Completes Registration Form
Approving Org Admin
Requesting Org Admin
Approving Org Admin
Operations Admin
Welcome Email Sent to End User

Send Email Invitation
Receive Email Invitation*
Submit Form
Approve
Request Functional Roles
Approve**
Acknowledge Access Request

Org Admin #1
Org Admin #2
Org Admin #2
Org Admin #1

Reject
Reject

Initiating Group and End User Receive Email Notification of Rejection

Requesting Group and End User Receive Email Notification of Rejection

### Legend

System Generated Audit Report

System Triggered Notification

*Email invitation link expires within 24 hours
**Approver *cannot* be the requestor

NOTE: Org Admins are expected to know the access and end user needs.

# MGM **ONBOARDING PREP**

The following information will help Organization Administrators prepare for onboarding End Users.

- Minimum of 2 Org Admins is required per Org ID (per MBS Guide), however a minimum of **3 ORG ADMINS** is recommended.

- User must be listed on **FORM HUD 11702** to be provided Org Admin privileges (except Document Custodians)

- Contact the Ginnie Mae Help Desk at ginniemae1@bnymellon.com to add a new Org Admin

- Org Admins are not allowed to manage their own account registration or access

- Org Admins should become familiar with Functional Roles. A table of Functional Roles and their descriptions is available in the Appendix of each MyGinnieMae User Manual.

- Org Admins should have the following information before sending a registration invitation to an End User:

  - ❑ Display Name (First Last)
  - ❑ Job Title
  - ❑ Email Address
  - ❑ Telephone Number
  - ❑ RSA Token Serial #, if applicable (data entered by End User but should be validated by Org Admin)
  - ❑ Issuer Name(s)
  - ❑ Issuer ID(s)

- *Org Admins will be sent a baseline user list to assist with gathering End User information*

# MGM **ACCOUNT MANAGEMENT**

**Organization Administrators** are solely **responsible for the ongoing management and maintenance** of End User accounts on behalf of their organization. The Operations Administrator is not authorized to assist with End User account management.  This includes but is not limited to:

- Initiate registration invitations to End User Account

- Approve or reject registration requests from End User Account

- Initiate access request/functional role for an End User Account

- Approve or reject functional role for an End User Account

- Remove a functional role from an End User Account

- Enable/Disable and Lock/Unlock End User Account

- Conduct password reset for End User Account

# MGM SYSTEM REQUIREMENTS

- **MyGinnieMae** is accessed via https://my.ginniemae.gov
- **Compatible Browsers** include Google Chrome 42+, Internet Explorer 11.x, and Mozilla Firefox 31+
- **Pop-up blocker** must disabled in the web browser prior to accessing MyGinnieMae
- MyGinnieMae accounts can only be created with a **corporate email address**. Emails from yahoo.com, gmail.com, me.com, etc. are not allowed
- **Customized Automation tools** that are currently used in legacy systems may require development to work with the new security requirements

# MGM WHAT TO EXPECT


In a Nutshell

- **Step One:** Org Admins receive email invitations to create a MGM account.
  - Invitations expire in 24 hours.

- **Step Two:** Once approved, those Org Admins will begin sending email invitations to End Users in their organization.
  - Invitations expire in 24 hours.

- **Step Three:** End users will be provided access to Ginnie Mae systems based on their functional role in the organization.
  - Users may not be granted more access than required

- **Step Four:** Enjoy the new portal!

# MGM **KEY DATES & ACTIVITIES**

**CALENDAR** - Schedule of key dates and training activities for the full release of the MyGinnieMae portal.

| Publication Name | Audience | Publish Date |
|---|---|---|
| MGM Release & Training Schedule | All MGM Users | 01/06/2020 |

- Training dates are currently posted
- Registration links for each event will be added to the calendar soon
- Portal users are welcome to **attend any session of interest**
- Org Admins will receive meeting invitations to training. End Users should stay tuned to eNotification and the Modernization Page.
- **All training sessions will be delivered via Zoom**.
    - o In order to participate in this class, you will need:
        - ✓ A computer with access to the internet
        - ✓ Zoom client installed on a computer
        - ✓ A telephone or computer speaker and microphone
    - o Register for the session using the links that will be provided in the Release and Training Schedule and on the Modernization page
    - o Review the Zoom Meeting Instructions in advance
    - o For firewall issues, contact your IT department and provide the following information: https://support.zoom.us/hc/en-us/articles/201362683-Network-Firewall-or-Proxy-Server-Settings-for-Zoom

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# MGM **THURSDAY SESSIONS**

- Weekly Listening Sessions every Thursday 2-3 p.m. (EST), beginning 2/6/20
- Open forum with experts on hand Office hours
  - Bring questions, issues, and feedback
  - Get answers, best practices, and latest updates
- Check the for WebEx details

**OUTREACH & TRAINING CALL DETAILS** - Tools designed to assist MyGinnieMae End Users and Organization Administrators in using the portal and its modernized applications.

| Topic | Audience | Meeting Format | Meeting Date |
|---|---|---|---|
| Weekly Listening Sessions | All Portal Users | WebEx | Every Thursday |
| **MGM Full Release Kickoff Call** | All Portal Users | Zoom | 01/14/2020 |

# MGM **RELEASE & TRAINING SCHEDULE**  As of 1/8/20

| | Program Type | Training Dates | Completion Target Date |
|---|---|---|---|
| **Wave I** <br><br> Begins 1/29/20 | Multifamily | • Org Admin – Onboarding End Users: 1/29/20 <br> • End User Training: 2/10/20 <br> • MFPDM Training: 2/13/20 or 2/14/20 <br> • Org Admin – Managing End Users: 2/13/20 | 5/11/20 |
| **Wave II** <br><br> Begins 2/18/20 | Single Family - Part One*: <br> Mega, Large, Medium, and Small <br> And <br> Subservicers | • Org Admin – Onboarding End Users: 2/18/20 <br> • End User Training: 2/20/20 <br> • Org Admin – Managing End Users: 3/9/20 | 6/3/20 |
| **Wave III** <br><br> Begins 3/16/20 | HECM | • Org Admin – Onboarding End Users: 3/16/20 <br> • End User Training: 3/23/20 <br> • Org Admin – Managing End Users: 4/8/20 | 7/7/20 |
| **Wave IV** <br><br> Begins 3/30/20 | Single Family - Part Two*: Very Small | • Org Admin – Onboarding End Users: 4/13/20 <br> • End User Training: 4/15/20 <br> • Org Admin – Managing End Users: 4/23/20 | 7/22/20 |
| **Wave V** <br><br> Begins 4/27/20 | Custodians | • Org Admin – Onboarding End Users: 4/27/20 <br> • End User Training: 4/30/20 <br> • Org Admin – Managing End Users: 5/11/20 | 8/10/20 |

*See Nov. 2019 "*IOPP Peer Group Listings*" for Program Type categorization.
https://www.ginniemae.gov/issuers/issuer_tools/IOPP/iopp_peer_group_201911.pdf
Contact CXG@hud.gov or ginniemae1@bnymellon.com if you have questions about your wave.

Check the Modernization Page for the latest information and resources for MyGinnieMae.

# MGM **EXISTING USERS**

## What if my organization is already in the portal?

- Use this opportunity to add new Org Admins
- Inform new users about training events
- Check for updated user materials on the Modernization Page
- Make sure RSA Token holders have token info added in MGM and connected to their new account

# MGM **MODERNIZATION PAGE**

## Bookmark the Modernization Page
https://www.ginniemae.gov/issuers/issuer_training/Pages/modernization.aspx



- Calendar
- Outreach & Training Call Details
- User Manuals
- Other Tools

For general inquiries about the full release of MGM, contact the Ginnie Mae Customer Experience Group (CXG) at CXG@hud.gov

For detailed questions about MGM, contact the Ginnie Mae Customer Support Hotline at 1-833-GNMA HELP / **1-833-466-2435** or ginniemae1@bnymellon.com