

MyGinnieMae Portal End User Training

November 5, 2018

TRAINING **AGENDA**

- **Overview**
- **Functional Roles**
- **Registration**
- **Logging On and Off**
- **Portal Navigation**
- **One-Time Password**
- **Troubleshooting and System Errors**
- **Getting Help**

MYGINNIEMAE WHAT IS IT?

MyGinnieMae, 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. The information included on this page is currently a seamless user registration and access request process for both the user and the approving authority.

To date more than \$22 billion dollars of business has been conducted in the new portal.

MYGINNIEMAE WHY THE CHANGE?

MyGinnieMae is an integral component to the Ginnie Mae modernization effort. It provides usability and features that are familiar to present day online application usage experiences. **MyGinnieMae provides security controls** that adhere to the Federal Information Security Management Act of 2002 (FISMA) and Federal Identity, Credential, and Access Management (FICAM) implementation guidance. This includes:

- **Single Sign-On** – provides seamless access to business applications using a single ID and password.
- **Secure Image and Phrase** – adds security by showing users their designated secure image and phrase in conjunction with the login screen.
- **One-Time Password (OTP)** – this code is sent to the user's email when accessing a secured application.

MYGINNIEMAE OTHER KEY FEATURES

- **Functional Roles:** Application Access Controls presented as Functional Roles enforce security of portal access for all users and systems with a means to associate authenticated system users with applicable rights and privileges within the Portal and associated application programs.
- **Self-Service Interface:** Self-service password management through a standard web-based interface.
- **Audit Support:** Reports and email notifications for Ginnie Mae business users to enable transparency across the organization. For Organization Administrators, MyGinnieMae provides reports reflecting user access, workflow request/approval details and account status.
- **Invitation Model:** Method to initiate the user registration process through an invitation that automates parts of the Registration Workflow.

EARLY ADOPTER PILOT FAQs

- **Is the MyGinnieMae portal in production? Yes.** Approximately \$22B of business has already been conducted in MyGinnieMae. All actions and transactions conducted in the business applications via the portal are live and in production.
- **What is the purpose of the Early Adopter pilot?** The goal is for Early Adopters to complete at least one full business cycle of pooling and reporting in MyGinnieMae before December 18th. Ginnie Mae has requested assistance from select business partners across the various organization types to begin using the portal in advance of the broad population to provide us with feedback on user materials, training, the onboarding process, portal features and portal functionality. Users are asked to attend Weekly Feedback Sessions to provide information that will ultimately inform Ginnie Mae Executives on readiness for full onboarding next Spring.
- **Can Early Adopters continue to log into GMEP 1.0 and GinnieNET directly, without going through the new portal? Please don't.** Once users have been onboarded into MyGinnieMae they will be able to securely access GMEP 1.0 and GinnieNET from the “Tools” drop-down menu in MyGinnieMae. Users are strongly discouraged from using their old credentials and to directly access the legacy systems. This can cause errors and access issues. If a user is having trouble conducting business in MyGinnieMae they should troubleshoot with the Organization Administrator and if unsuccessful, contact the Ginnie Mae Help Desk for assistance.

EARLY ADOPTER PILOT **KEY DATES**

Goal: Collect a full business cycle of information to assess readiness for full onboarding.

- **Every Tuesday:** Weekly Feedback Sessions
- **Oct 17:** Training for Org Admins on Onboarding Users
- **Oct 18-22:** Onboard Org Admins
- **Nov 5:** Training for End Users
- **Nov 6 and Nov 7:** MFPDM (Multifamily Pool Delivery Module) Training
- **Nov 8:** Training for Org Admins on Managing End Users
- **Dec 18:** Final Weekly Feedback Session

ROLES RESPONSIBILITIES

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	<p>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. Formerly known as Security Officers and Enrollment Administrators.</p> <p>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.</p>
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.

ROLES FUNCTIONAL ROLES

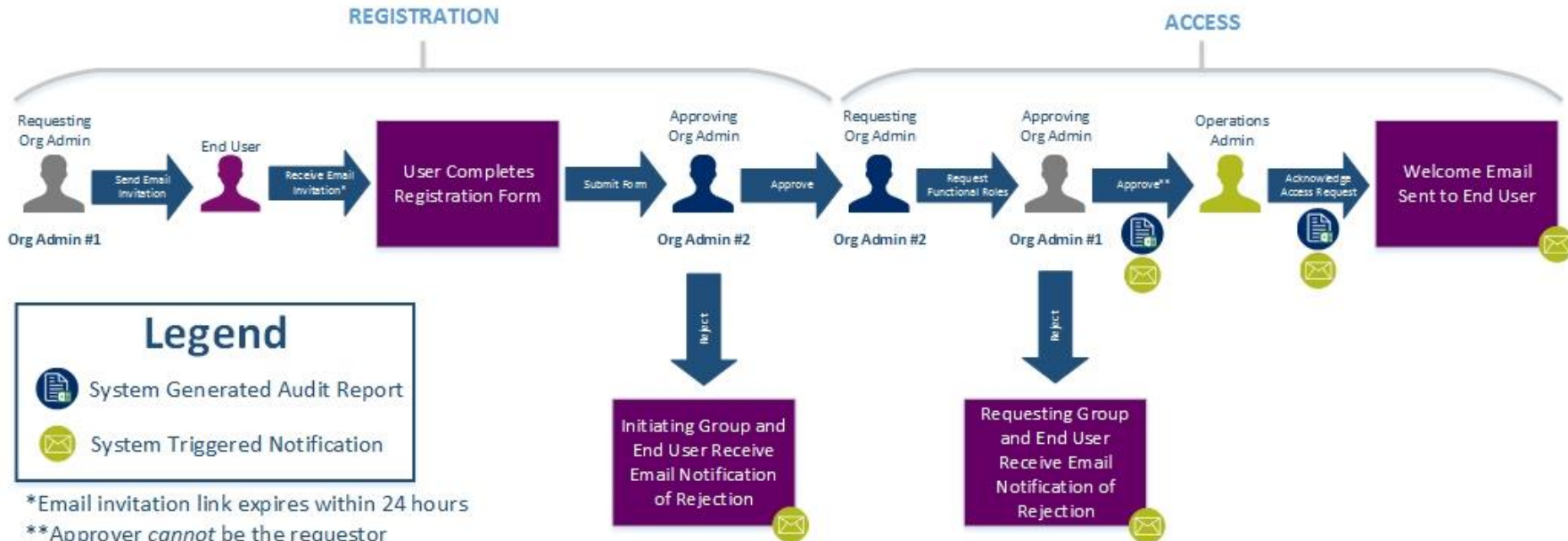
Users are provided **access based on their business activities** which are organized into meaningful access profiles called Functional Roles. Use of Functional Roles ensures users have appropriate level of access in relation to their job functions/responsibilities, enforces the least privilege principle, 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

ONBOARDING WORKFLOW

Onboarding is a multi-step process that may take several days to complete and requires participation from the end user, Organization Administrators, and Ginnie Mae.

- **Registration Workflow** – creates a portal account and give users access to the portal.
- **Access Workflow** – assigns functional role(s) and give users access to business applications.



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

REGISTRATION NEW USER ACCOUNT

NEW USER REGISTRATION

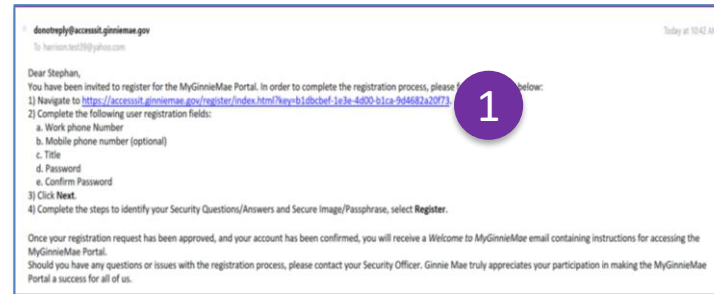
Users will receive an email inviting them to register on MyGinnieMae with the subject line "Welcome to MyGinnieMae Registration".

1. Select the link to register. Note **registration link is only active for 24 hours**.

For questions or issues with the registration link or process, please contact your Organization Administrator.

2. Fill out the **Additional Information** on the "New User Registration Form":
 - a. Work Phone Number
 - b. Mobile Phone Number (optional)
 - c. Title
 - d. Password
 - e. Confirm Password
3. Select either the hyperlink that says, **"I agree with the Terms and Conditions"** or the check box next to it.
4. A pop-up box will appear and display Ginnie Mae's "Rules of Behavior". Review the text then scroll to the bottom and select **Yes (Agree)** to accept the Rules of Behavior.

The "I agree with the Terms and Conditions" checkbox is now checked on the New User Registration Form



The "New User Registration Form" is shown. It has two tabs: "1. Additional Information" (active) and "2. Finish". The form fields include: First Name (Jack), Middle Name, Last Name (Bekman), Email (jbdene@gmail.com), Title (Mr.), Work Phone, Mobile Phone, Password, and Verify Password. There are checkboxes for "I agree with the Terms and Conditions" and "I accept the privacy policy". A purple circle with the number 2 is overlaid on the "Additional Information" tab, and a purple circle with the number 3 is overlaid on the "I agree with the Terms and Conditions" checkbox.

A pop-up box titled "Rules of Behavior" is shown. It contains the text: "I acknowledge that I have read the attached Rules of Behavior for Use of Information Resources. I understand, accept, and agree to comply with all terms and conditions of these Rules of Behavior." At the bottom, there are two buttons: "Cancel" and "Yes (Agree)". A purple circle with the number 4 is overlaid on the "Yes (Agree)" button.

5. Select either the hyperlink that says, “**I accept the privacy policy**” or the check box next to it (see previous pic).
6. A pop-up box will appear and display a link to the “Ginnie Mae Privacy Policy”. Select the link and review the text then select **Yes** to accept the privacy policy.

The “I accept the privacy policy” checkbox is now checked on the New User Registration Form

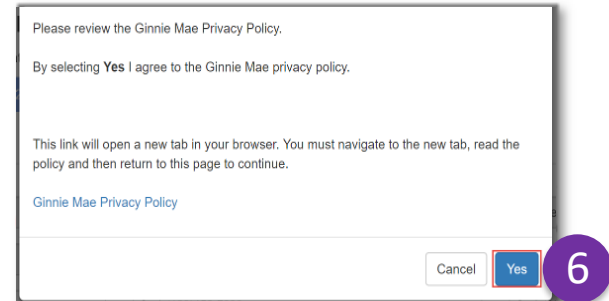
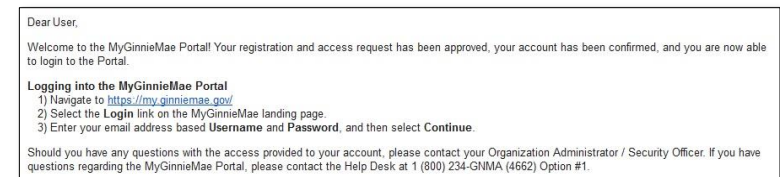
7. Select **Next** on the New User Registration Form.

The **Image and Phrase** page will display.

8. Select a Secure Image and Phrase using the **New Image** button.
9. Set the three **Challenge Questions** from the drop-down boxes and enter the **Answers** in the text fields.
10. Select **Finish**.

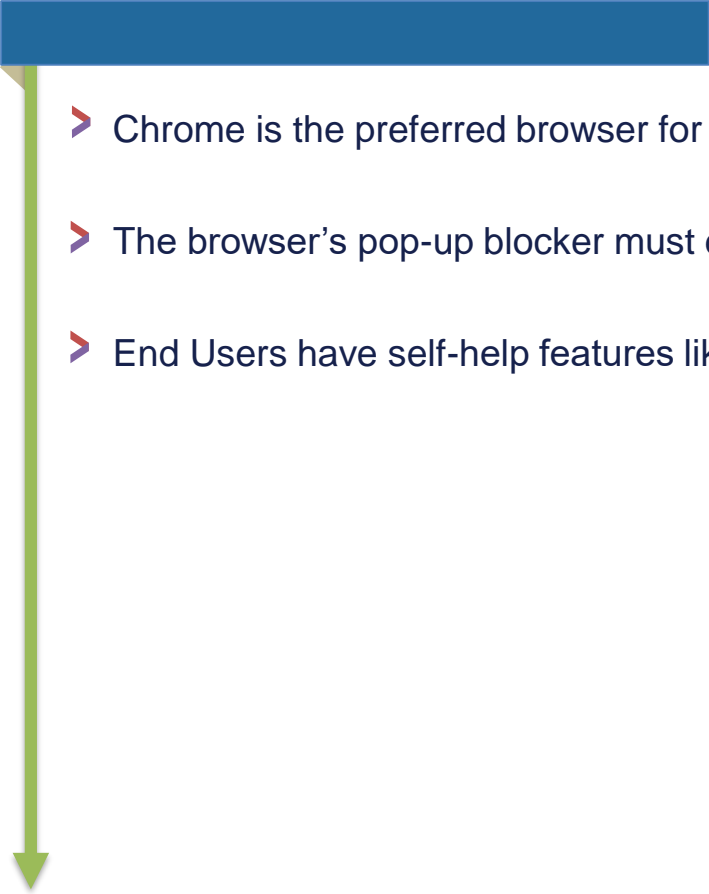
The registration request is complete and awaiting approval.

Once the request is approved a “Welcome Email” will be sent to the email address provided and MyGinnieMae can be accessed using the Username (email address) and Password.

Q&A

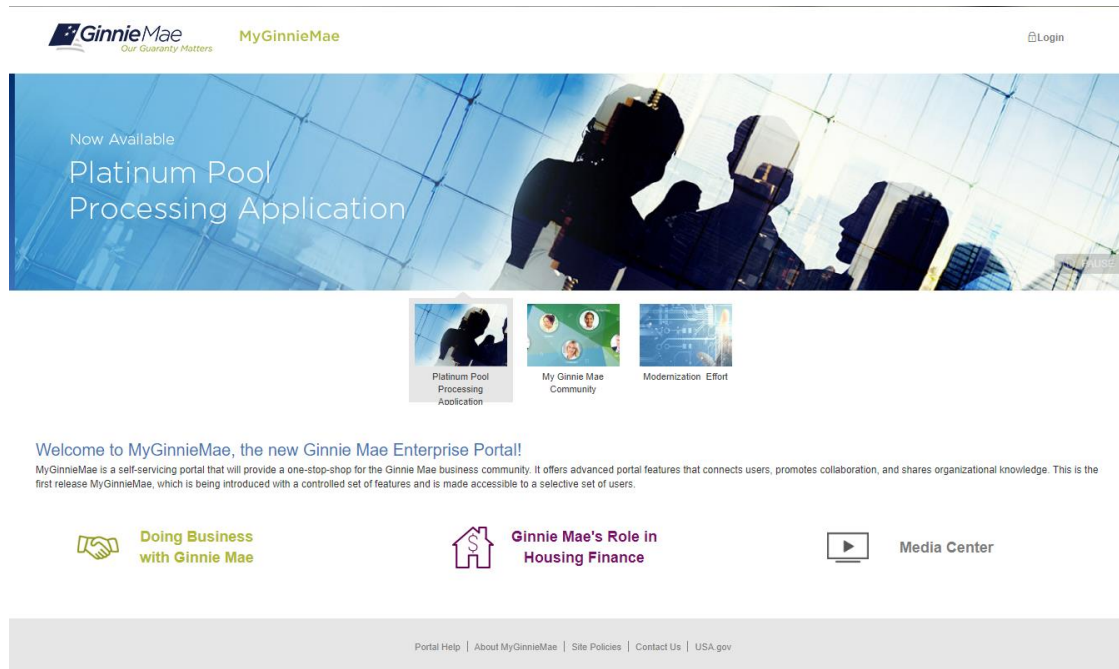
USING MYGINNIEMAE **TIPS**

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- Chrome is the preferred browser for accessing MyGinnieMae
 - The browser's pop-up blocker must be disabled prior to accessing MyGinnieMae
 - End Users have self-help features like "Forgot Password" to save time

USING MYGINNIEMAE LOGGING ON

The following notes and tips regard accessing MyGinnieMae, including navigating the One-Time Password (OTP). See **Section 3.1 Logging on to MyGinnieMae** in the End User Guide for more information.

- Do not bookmark the Login Page. The correct page to bookmark is the Public Landing Page at <https://my.ginniemae.gov>.



USING MYGINNIEMAE NAVIGATING

The following notes and tips regard navigating MyGinnieMae. See **Section 3.2 Navigating the Portal** in the End User Guide for more information.

- The first time accessing an application, a one-time dialog box will be displayed requesting selection of the default account.
- Avoid clicking links more than one; instead wait 10-20 seconds for the application tab or window to open.
- Users with multiple MyGinnieMae Issuer accounts need to keep track of the access/org provided to them for each account when selecting those accounts.

My Profile

John Smith

EDIT PHOTO DELETE PHOTO

Contact Work Connections (2) Account

Previous Login
Last successful login on 2018-10-29 15:50:44.351 from IP Address 10.69.114.40

Change Security Settings

Default Account Login(s)

GMEP 1.0

I_jsmith22045

I_jsmith22045

I_jsmith23153

I_jsmith4188

GinnieNET

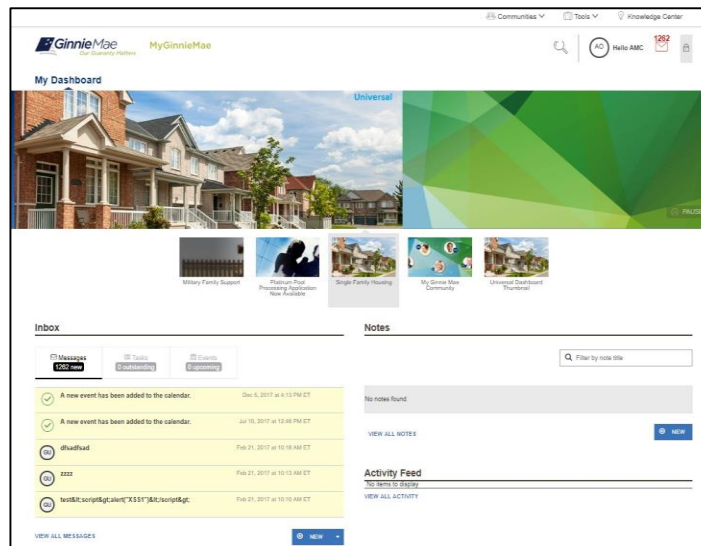
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Portal Help | About MyGinnieMae | Site Policies | Contact Us | USA.gov

USING MYGINNIEMAE MYDASHBOARD

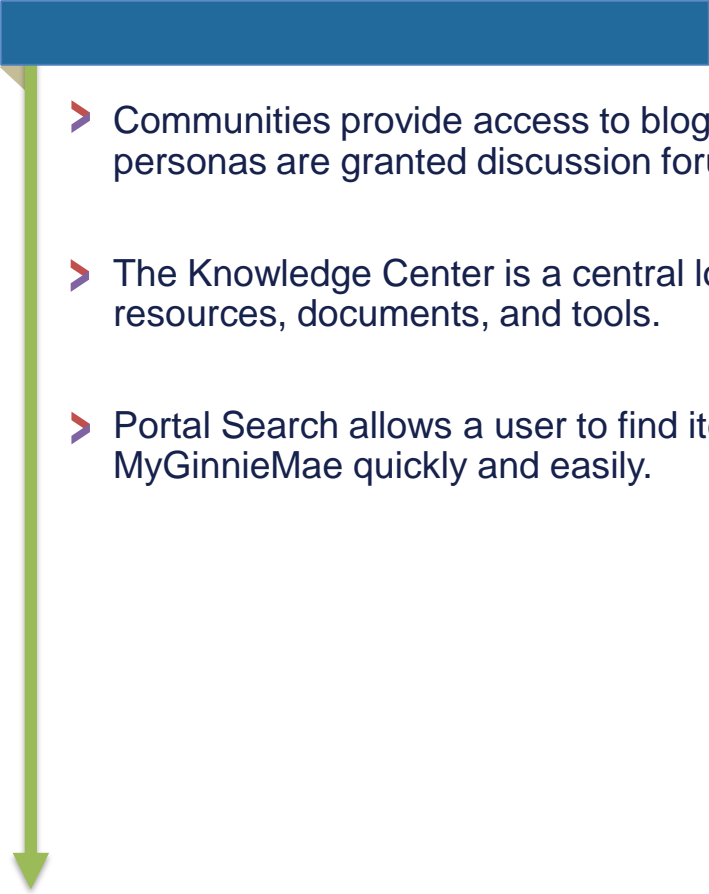
The following notes and tips regard My Dashboard. See **Section 3.2.3 My Dashboard** in the End User Guide for more information.

- You can access Communities, Tools, Files and the Knowledge Center using the global header.
- You can view recent messages from the Inbox by selecting an individual message, or select **VIEW ALL MESSAGES** to see the entire list.
- The Activity Feed provides summarized updates from shared components such as community forums and files.
- Bookmarks allow you to view (and manage) news feeds that appear on My Dashboard.



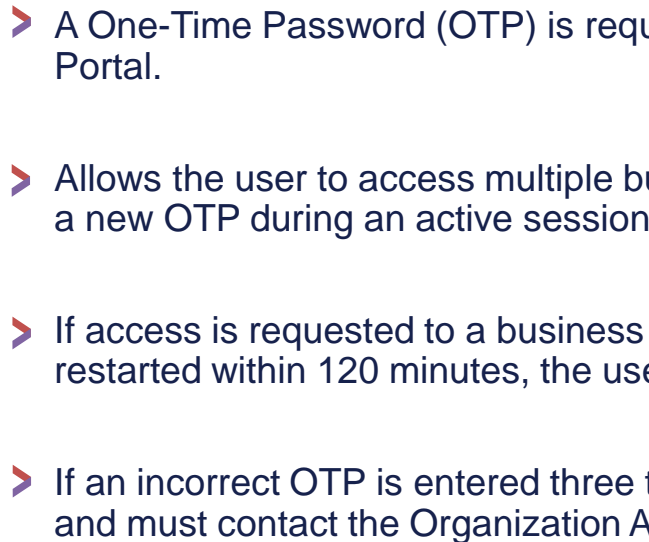
USING MYGINNIEMAE PORTAL FEATURES

The following notes and tips regard additional Portal features. See **Sections 3.2.4-3.2.6** in the End User Guide for more information.

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- Communities provide access to blog posts and discussion forums. Note that not all personas are granted discussion forum functionality.
 - The Knowledge Center is a central location to view and download approved resources, documents, and tools.
 - Portal Search allows a user to find items such as files, forums, and people within MyGinnieMae quickly and easily.

MYGINNIEMAE ONE-TIME PASSWORD

The following notes and tips regard One-Time Password. See **Section 3.2.1 Accessing Business Applications** in the End User Guide for more information.

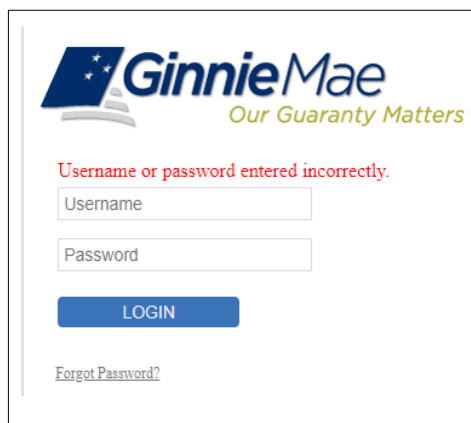
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- A One-Time Password (OTP) is required to access business applications within the Portal.
 - Allows the user to access multiple business applications without being re-prompted for a new OTP during an active session.
 - If access is requested to a business application after a session has been ended and restarted within 120 minutes, the user will not be prompted for another OTP.
 - If an incorrect OTP is entered three times the user will be locked out of their account and must contact the Organization Administrator for assistance.

LIVE DEMO

TROUBLESHOOTING SYSTEM ERRORS

The following notes and tips regard troubleshooting and system errors. See **Section 5.0 Troubleshooting and System Errors** in the End User Guide for more information.

- An error message may be displayed for the following reasons:
- Newly entered passwords do not match
 - An invalid username or password has been entered upon log in
 - An invalid OTP has been entered when attempting to access a business application



The image shows the GinnieMae login interface. At the top is the GinnieMae logo with the tagline "Our Guaranty Matters". Below the logo, a red error message reads "Username or password entered incorrectly." There are two input fields labeled "Username" and "Password". A blue "LOGIN" button is positioned below the fields. At the bottom left, there is a link that says "Forgot Password?".

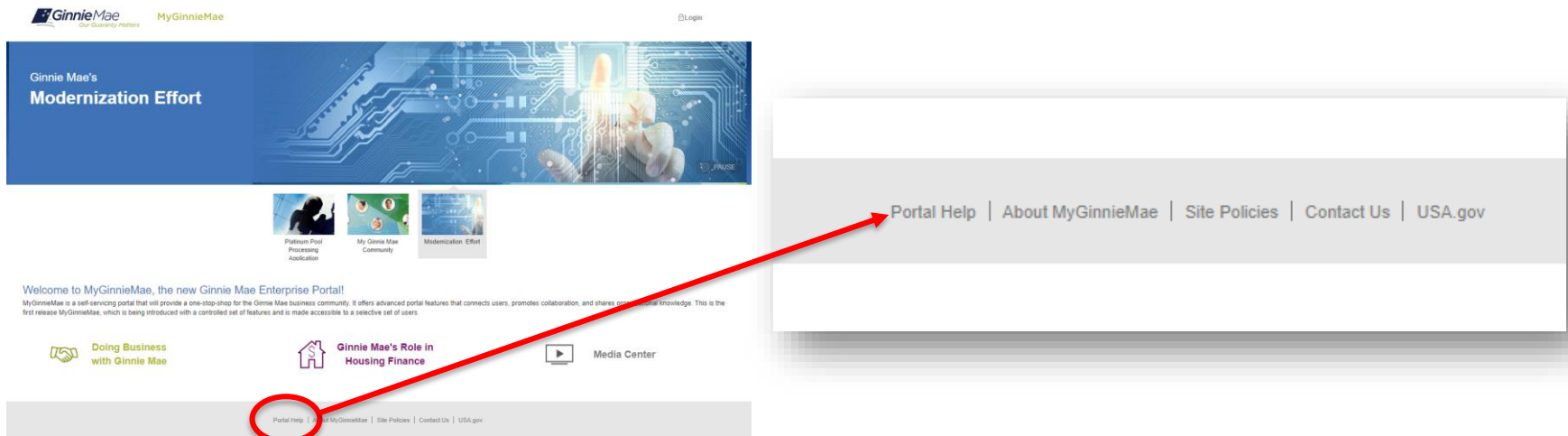


The image shows the GinnieMae OTP verification screen. At the top is the GinnieMae logo with the tagline "Our Guaranty Matters". Below the logo, a text prompt says "To confirm your identity, enter the code sent to you in email." A red error message in a box reads "Incorrect OTP. Please try again." Below this is a mobile phone screen displaying a giraffe image, a "Password:" label, a text input field, and a numeric code "8/512018 23:14 (EDT)". An "enter" button is at the bottom of the phone screen. Below the phone screen, there are two links: "Not your image and phrase What's this?" and "Did not receive OTP?". A purple arrow points to the "Did not receive OTP?" link.

- If an OTP has not been received, allow a few minutes for messaging and email clients to deliver the notification. If an OTP is still not received, select the "Did not receive OTP?" link to resend.

GETTING HELP RESOURCES

The MyGinnieMae Organization Administrator User Manual will provide answers to most questions. It is currently located on the [Modernization Page](#) for Early Adopters. You may also reference the [Portal Help](#) link located at the bottom of the [MyGinnieMae Public Landing Page](#) for general questions. If a solution cannot be found, seek assistance from the Ginnie Mae Help Desk at 1-800-234-GNMA (4662) Option 1.



Org Admins can complete most functions on behalf of the organization. The Ginnie Mae Help Desk team must perform the following functions:

- Unlock any User's OTP
- Reset any User's OTP Email
- All Org Admin account registration and management activities

GETTING HELP **RESOURCES**

- Modernization Page on GinnieMae.gov
https://www.ginniemae.gov/issuers/issuer_training/Pages/modernization.aspx
 - User Guides
 - Quick Reference Cards
 - Training Overviews
- Ginnie Mae Help Desk 1-800-234-GNMA(4662) or ginniemae1@bnymellon.com
- Stay tuned for emails
ginniemae1@bnymellon.com
donotreply@access.ginniemae.gov
latricia.j.jefferson@hud.gov