

# MyGinnieMae Portal Onboarding Users

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Organization Administrator Training  
October 17, 2018

# TRAINING **AGENDA**

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- **Objectives**
- **Overview**
- **Organization Administrator Role**
- **Getting Started**
  - Registering for an account
  - Logging On and Off
- **Preparing for Onboarding End Users**
- **Registration and Access Workflows**
- **Managing End User Accounts**
- **Troubleshooting and System Errors**
- **Getting Help**
- **Key Dates**

# TRAINING OBJECTIVES

- **Provide a high-level overview of general portal features**
- **Provide instructions on how to register for your own portal account**
- **Provide guidance on how to prepare for onboarding your End Users**
- **Provide instructions on onboarding End Users**
- **Provide information on troubleshooting and getting help**
- **Provide a schedule of key pilot activities**

## OVERVIEW **KEY FEATURES**

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.

# OVERVIEW **OTHER KEY FEATURES**

- **MyGinnieMae Access Management Console (AMC):** User friendly interface for administrators to initiate access requests, manage end users within their organization(s), and perform other administrative functions.
- **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.

# ORG ADMIN ROLE 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	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  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.

# ORG ADMIN ROLE PRIVILEGES

- Initiate registration invitations to End Users
- Approve or reject registration requests from End Users
- 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 accounts



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

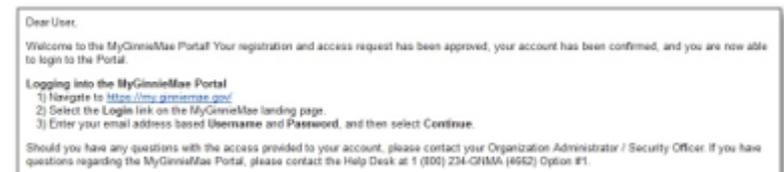
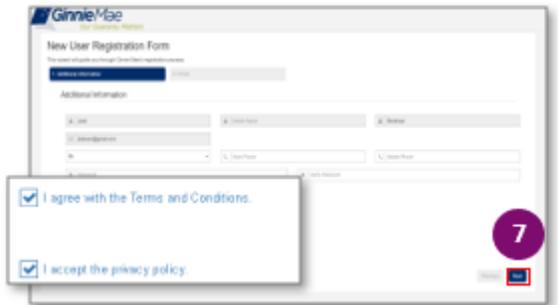
7. Select **Next** on the New User Registration Form.

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.



# GETTING STARTED **LOGGING ON AND OFF**

Below are tips for opening, maintaining, and closing portal sessions in MyGinnieMae and Access Management Console (AMC). See **Section 2: Logging On and Off** in the Organization Administrator 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>.
- The Access Management Console (AMC) is the user interface used by Org Admins to manage Portal user accounts. It is accessible via the Tools > Applications menu.
- The Portal does *not* recognize activity in the AMC as Portal activity. If the Org Admin is active within AMC for longer than 20 minutes the system will prompt to re-enter credentials when navigating back to the Portal.
- Signing out of AMC terminates the user's Portal session.
- The One-Time Password (OTP) is an eight-digit code which is valid for 10 minutes and is sent to the user's email address. It is required to access Business Applications within the Portal and is valid for 120 minutes.

*LIVE DEMO*

Org Admin Registration and  
Log On

# PREPARING ONBOARDING END USERS

The following information will help the organization and its users prepare for the onboarding process.

## REQUIREMENTS

- Minimum of **2 Org Admins** is required per Org ID (per MBS Guide)
- User must be listed on **Form HUD 11702** to be provided Org Admin privileges
- Org Admins are not allowed to manage their own account registration or access
- The browser's pop-up blocker must be disabled prior to accessing MyGinnieMae

## TIPS

Org Admins must be familiar with Functional Roles. A table of **Functional Roles** and their descriptions is available in the Appendix of the [MyGinnieMae User Manual](#) for Organization Administrators.

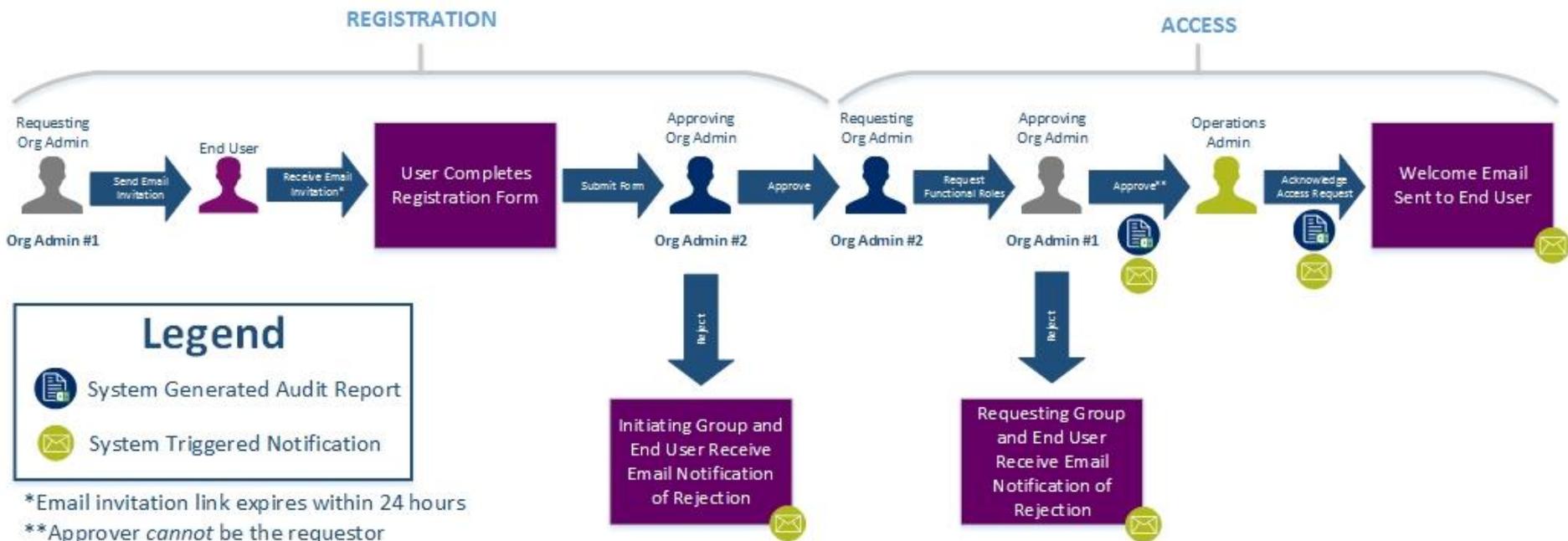
Org Admins must be familiar with the access needed for the users they manage within their organization. Use the **Early Adopter Onboarding Query**, an extract of current user access, as a reference tool to prepare for user registration.

Review the weekly **User Access Onboarding Report** to track progress of completing user access in MyGinnieMae.

Attend **Organization Administrator Listening Session** every Tuesday to ask questions and get advice to assist with onboarding and managing End Users.

# PREPARING ONBOARDING WORKFLOW

- **Registration Workflow** – creates a portal account
- **Access Workflow** – assigns functional role(s)



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

# PREPARING 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.). See **Section 1.2.4: Functional Roles** in the Organization Administrator Guide.

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 servicer 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

# PREPARING REPORTS

**Early Adopter Onboarding Query:** An extract of current users to be used as a tool during onboarding. It includes Security Officer and/or Enrollment Administrative privileges for GMEP and GinnieNET and email addresses to enable outreach for communication and training session scheduling and to reveal current users assigned roles in GMEP 1.0 and GinnieNET.

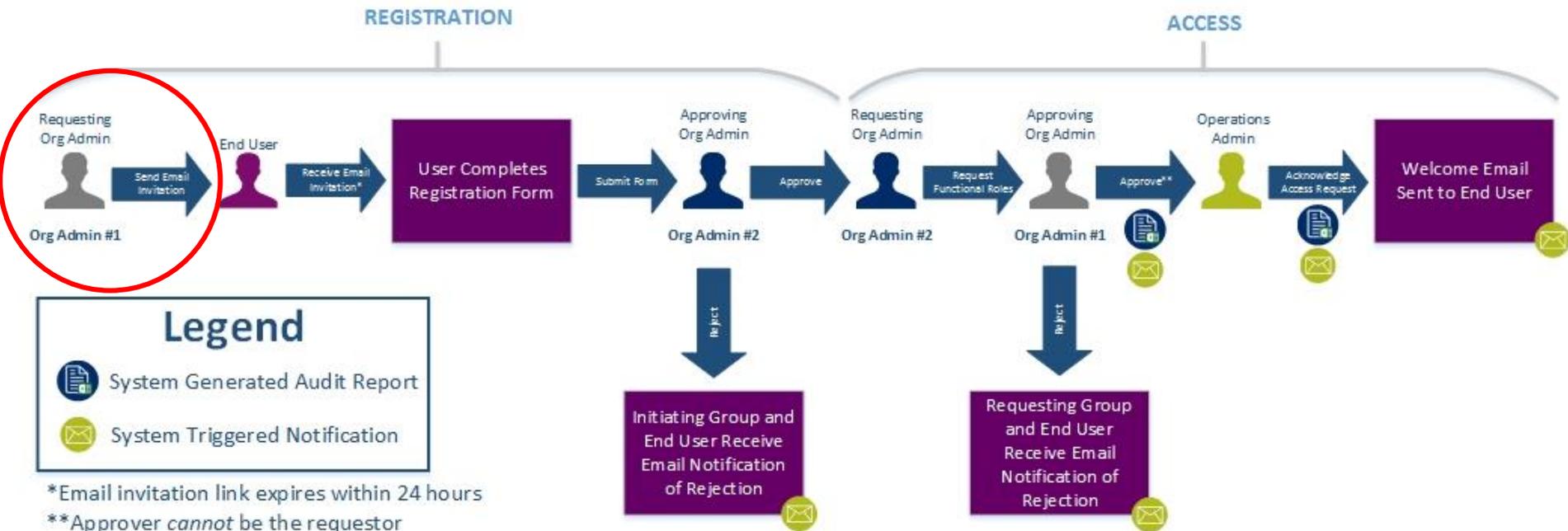
Active Indicator	Business ID	Business Name	EMAIL	User ID	User Name	Work Phone	Application	User Type	GNET/GMEP Role Names	GNET/GMEP Role Codes
Y	00011X	Early Adopter bank, N.A.	<a href="mailto:User1.hull@earlyadopter.com">User1.hull@earlyadopter.com</a>	C_hull	User 1	(555) 000-0000	GMEP	Other	Authorized GinnieNET Signer; SecurID Token Holder; eNotification User	GNET_RSA; RSA_TOKEN; eNOTE_USER
Y	00011X	Early Adopter bank, N.A.	<a href="mailto:User1.hull@earlyadopter.com">User1.hull@earlyadopter.com</a>	C000001	User 1	(555) 000-0000	GNET	Other	Custodian	CUST_____
N	000115X	Early Adopter bank, N.A.	<a href="mailto:User2.hull@earlyadopter.com">User2.hull@earlyadopter.com</a>	C000002	User 2	#N/A	GNET	Other	Custodian	CUST_____
Y	000115X	Early Adopter bank, N.A.	<a href="mailto:User3.hull@earlyadopter.com">User3.hull@earlyadopter.com</a>	C_hull3	User 3	(555) 000-0000	GMEP	Other	BO Ad Hoc Reports; PTS Document Custodian Report Access; Authorized GinnieNET Signer; SecurID Token Holder; eNotification User	DC_MAMS; DC_PTS; GNET_RSA; RSA_TOKEN; eNOTE_USER
Y	000115X	Early Adopter bank, N.A.	<a href="mailto:User3.hull@earlyadopter.com">User3.hull@earlyadopter.com</a>	C_hull3	User 3	(555) 000-0000	GMEP	Security Officer	BO Ad Hoc Reports; PTS Document Custodian Report Access; Authorized GinnieNET Signer; SecurID Token Holder; eNotification User	DC_MAMS; DC_PTS; GNET_RSA; RSA_TOKEN; eNOTE_USER

## TIP

To prepare for onboarding an Organization Admin may use the above report to verify the user's name, contact and other details. In addition, based on the existing user's access roles, the Org Admin's knowledge of their user base and the new functional roles to determine what access should be provisioned in MyGinnieMae.

# REGISTRATION SEND INVITATION

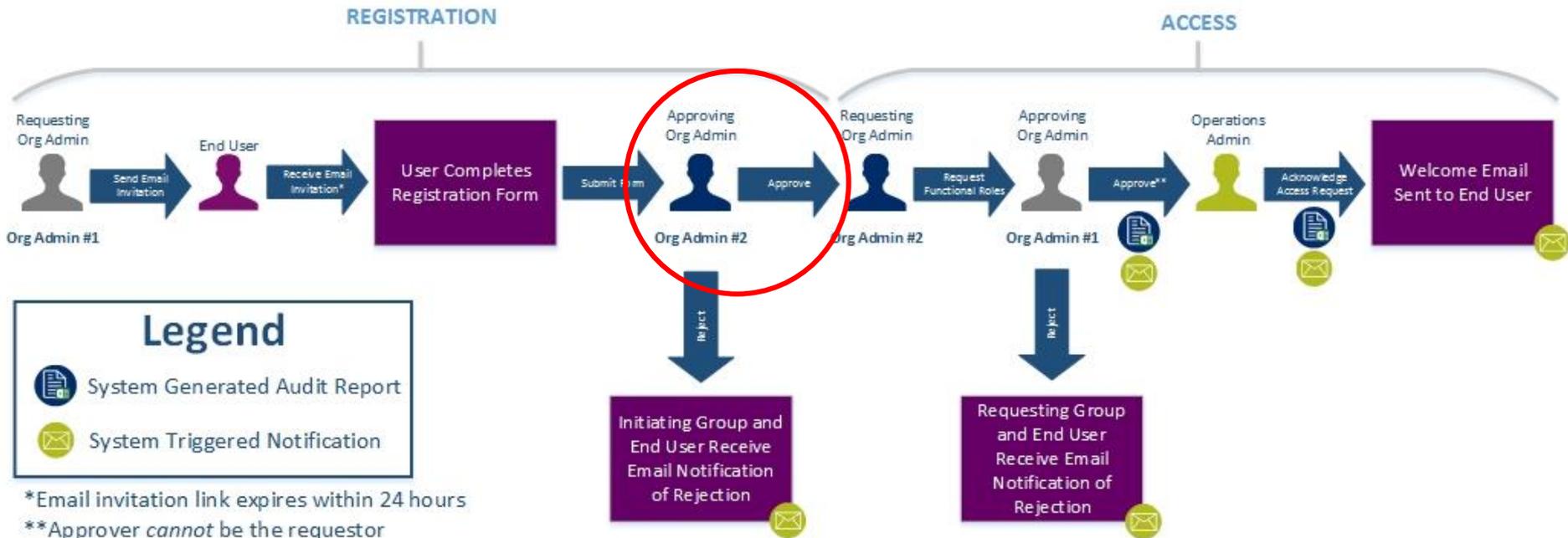
- **Registration Workflow** – creates a portal account
- **Access Workflow** – assigns functional role(s)



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

# REGISTRATION APPROVE INVITATION

- **Registration Workflow** – creates a portal account
- **Access Workflow** – assigns functional role(s)



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

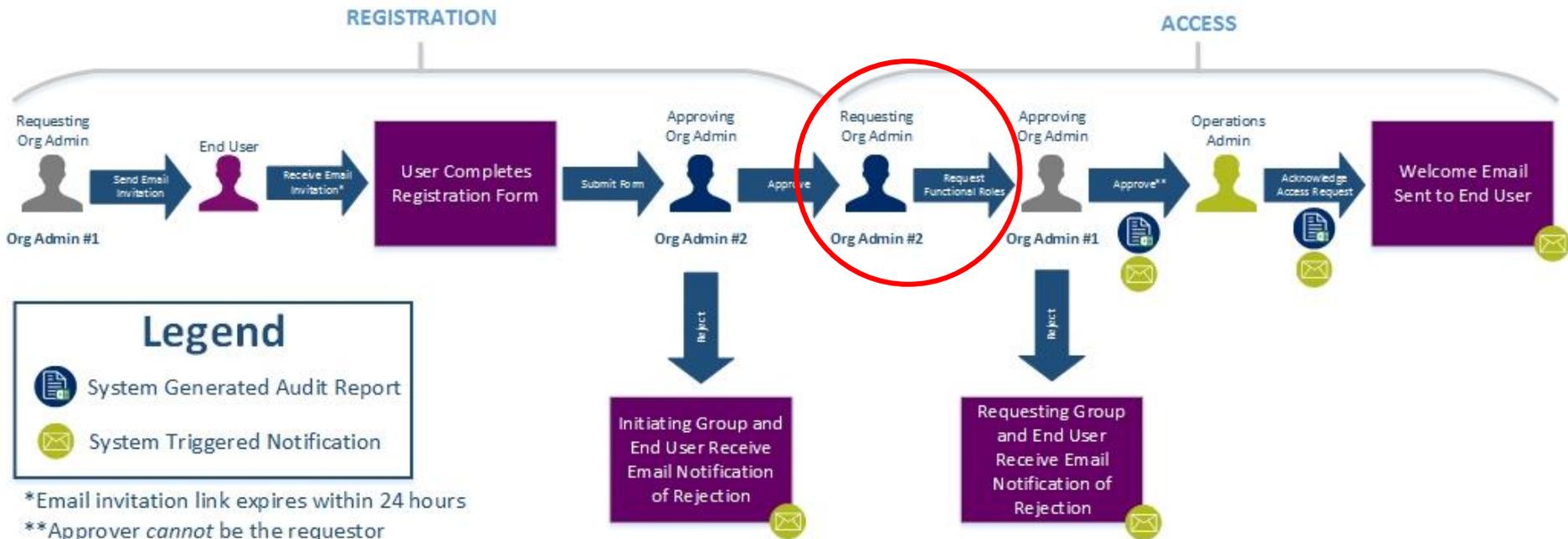
# REGISTRATION ONBOARDING TIPS

The following notes and tips regarding sending an invitation to register for the Portal through approval of an access request. See **Sections 3.0-3.4** in the Organization Administrator User Guide for more information.

- User registration uses a self-service registration form to collection information from potential end users that is verified and used to create a new user account.
- Once the User Invitation Form is completed, an email is sent to the email address entered in the form with a unique URL that is valid for 24 hours for the End User to complete their registration.
- All Org Admins, except the one that sent the Registration Invitation, will be notified via email to approve the User Registration request once it has been completed.
- If there are multiple registration requests for the same user email, the system will only allow to approve one request record. The remaining request(s) should be rejected.
- Within the AMC Approvals screens, User Registration fields are *not* editable. If there are any errors or incorrect information the request must be rejected, and a new registration must be submitted.

# ACCESS FUNCTIONAL ROLE REQUEST

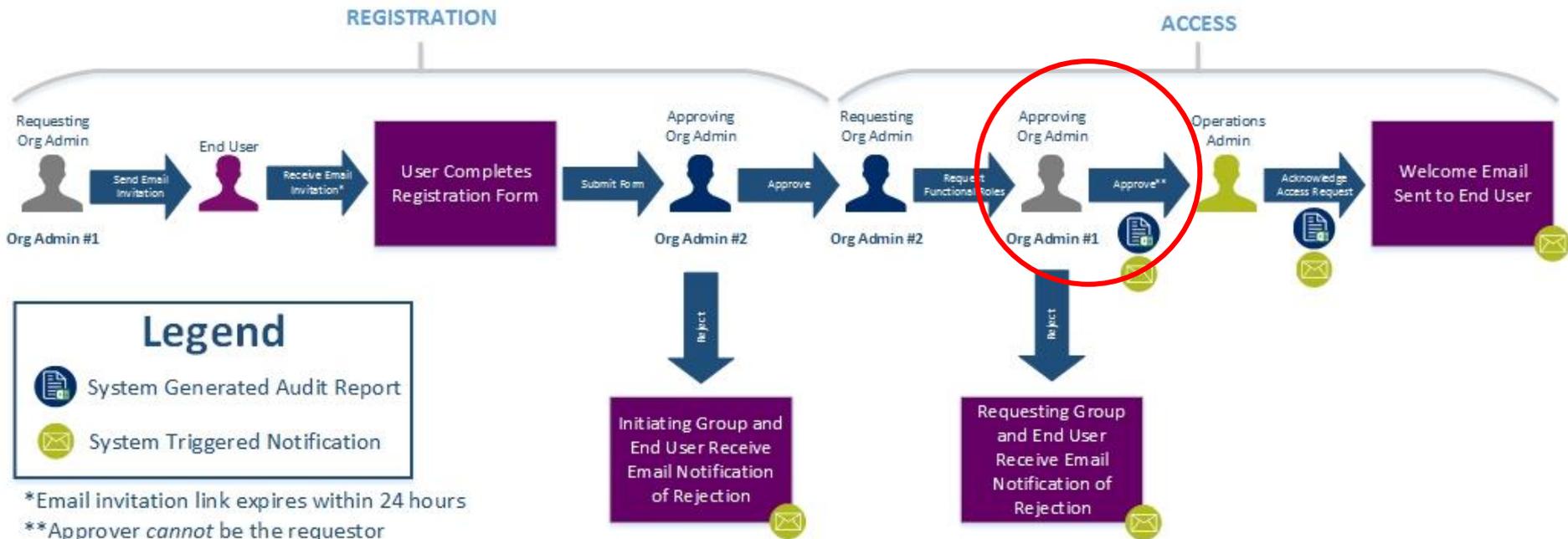
- **Registration Workflow** – creates a portal account
- **Access Workflow** – assigns functional role(s)



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

# ACCESS FUNCTIONAL ROLE APPROVAL

- **Registration Workflow** – creates a portal account
- **Access Workflow** – assigns functional role(s)



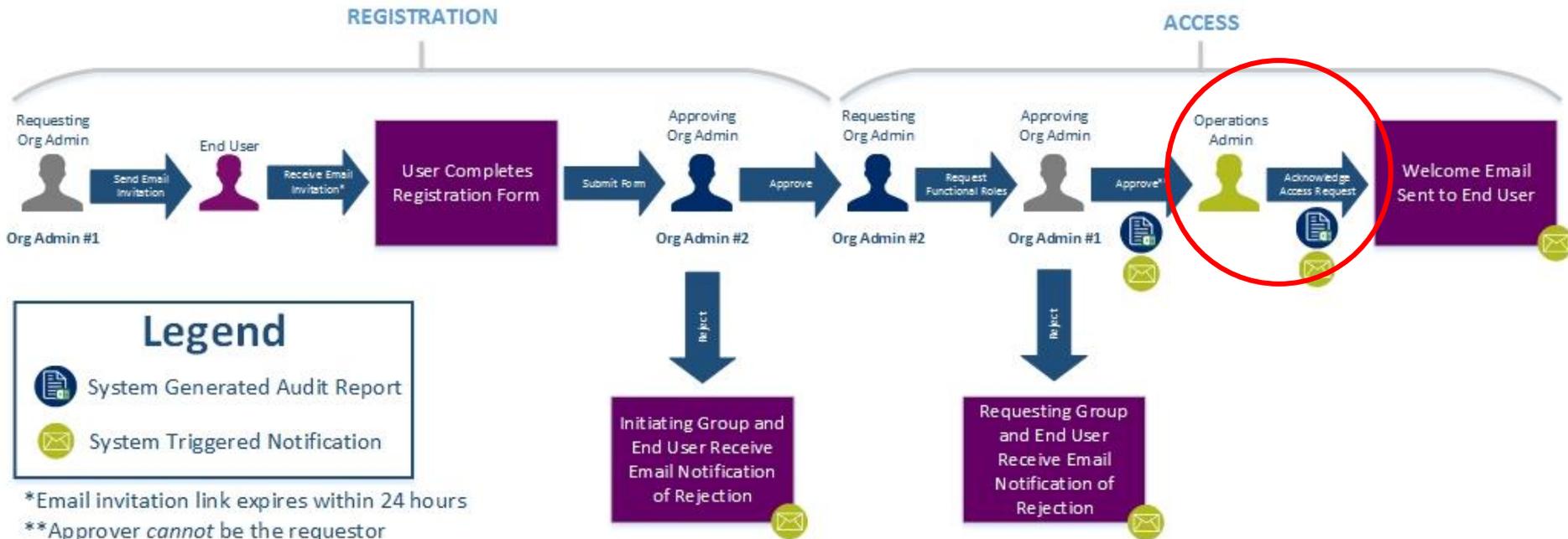
NOTE: Org Admins are expected to know the access and end user needs.

*LIVE DEMO*

Registration and Access  
Workflows

# ACCESS FINALIZATION

Finalization is completed by the Operation's Administrator (BNYM). The Ops Admin is notified when an End User account requires finalization. During the Early Adopter Pilot please allow 2-3 business days for this step to be complete.



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

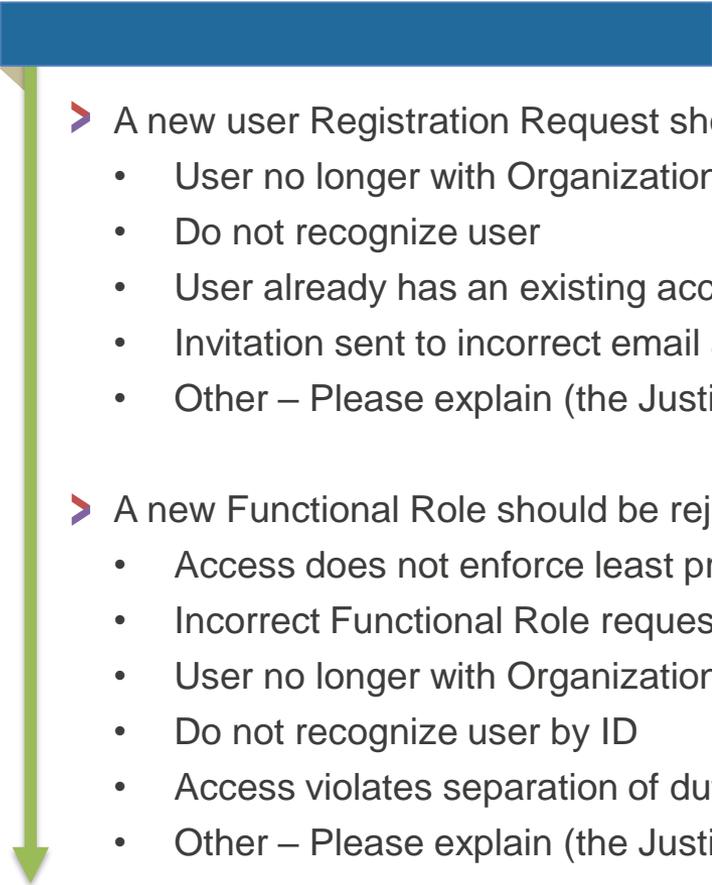
# MANAGEMENT RESTRICTING USER ACCOUNTS

The following notes and tips regarding removing functional roles, disabling a user account, and locking a user account. See **Sections 3.5, 3.6, or 3.8** in the Organization Administrator User Guide for more information.

- Org Admins are responsible for removing Functional Roles from users that no longer require that particular role/access.
- Org Admins are responsible for disabling a user's account from AMC if the user has left the organization or for other organization specific reasons (such as a change in role).
- Locking a user's account is a temporary action and can be reverted.

# MANAGEMENT REJECTING REQUESTS

The following notes and tips regard rejecting a new user registration or functional role request. See **Sections 3.12-3.13** in the Organization Administrator User Guide for more information.

- 
- A new user Registration Request should be rejected if:
    - User no longer with Organization
    - Do not recognize user
    - User already has an existing account
    - Invitation sent to incorrect email address
    - Other – Please explain (the Justification Description will be required)
  
  - A new Functional Role should be rejected if:
    - Access does not enforce least privilege
    - Incorrect Functional Role requested
    - User no longer with Organization
    - Do not recognize user by ID
    - Access violates separation of duties
    - Other – Please explain (the Justification Description will be required)

# MANAGEMENT REVIEW USER STATUS

The following notes and tips regard reviewing the status of an access request or the verification of a Functional Role. See Sections 3.14-3.15 in the Organization Administrator User Guide for more information.

## > Statuses of an Access Request:

- PENDING – The Functional Role request is submitted and awaiting Organization Administrator approval.
- APPROVED – The Functional Role is approved and awaiting Operations Administrator action.
- FINALIZED – The Functional Role request has been finalized by the Operations Administrator and the underlying roles are in the process of being assigned to the user.

## > A system error could potentially prevent a role from being assigned to a user. If this occurs, the Organization Administrator group receives a notification. Functional Roles may have the following statuses:

- CONFIRMED
- PARTIAL – MISSING
- MISSING
- PARTIAL – NO ACCOUNT
- FAILED

# MANAGEMENT USER ACCESS ONBOARDING REPORT

USER REGISTRATION DETAILS								
USERLOGIN	INVITATION CREATEDATE	EXPI RED	REQUES TSTATUS	REGISTRATION SUBMITDATE	REGISTRATIONA PPROVEDDATE	CREATOR	APPROVERS	OUT COM E
<a href="mailto:john.doe@computers.com">john.doe@computers.com</a>	21-Sep-18		Request Comple ted	21-Sep-18	21-Sep-18	<a href="mailto:larry.hughes@bnymellon.com">larry.hughes@bnymellon.com</a>	<a href="mailto:jeremy.brown@bnymellon.com">jeremy.brown@bnymellon.com</a>	APPR OVE
<a href="mailto:jack.does@computer.com">jack.does@computer.com</a>	21-Sep-18		Request Comple ted	21-Sep-18	21-Sep-18	<a href="mailto:robert.strickland@bnymellon.com">robert.strickland@bnymellon.com</a>	<a href="mailto:larry.hughes@bnymellon.com">larry.hughes@bnymellon.com</a>	APPR OVE

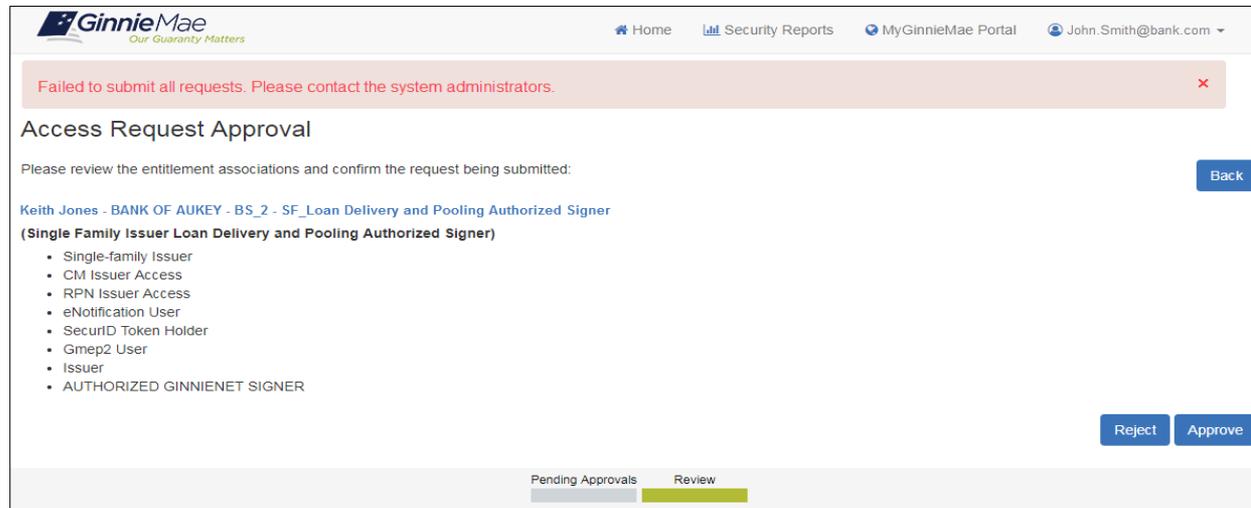
AMC FUNCTIONAL ROLE STATUS								
FUNCTIONA LROLENAME	ORGK EY	REQUE STDAT	REQUESTEDBY	APPROV ALDATE	APPROVEDBY	FINALIZAT IONDATE	FINALIZATIONBY	FUNTIONAL ROLESTATUS
Depositor	DP_1 0013 8	21-Sep- 18	<a href="mailto:robert.strickland@bnymellon.com">robert.strickland@bnymellon.com</a>	21-Sep- 18	<a href="mailto:jeremy.brown@bnymellon.com">jeremy.brown@bnymellon.com</a>	21-Sep-18	<a href="mailto:robert.strickland@bnymellon.com">robert.strickland@bnymellon.com</a>	CONFIRMED
Depositor	DP_1 0013 8	21-Sep- 18	<a href="mailto:jeremy.brown@bnymellon.com">jeremy.brown@bnymellon.com</a>	25-Sep- 18	<a href="mailto:robert.strickland@bnymellon.com">robert.strickland@bnymellon.com</a>	25-Sep-18	<a href="mailto:jeremy.brown@bnymellon.com">jeremy.brown@bnymellon.com</a>	CONFIRMED

PRIVILEGED ROLE STATUS						LAST LOGIN STATUS
REQUESTC REATEDATE	REQUEST ENDDATE	REQU ESTOR	BENEF ICARY	ROLEDISP LAYNAME	REQUES TSTATUS	LASTLO GINDAT E

# TROUBLESHOOTING SYSTEM ERRORS

The following notes and tips regard troubleshooting potential end user or system errors. See [Section 4: Troubleshooting and System Errors](#) in the Organization Administrator User Guide for more information.

- A notification ribbon appears at the top of AMC to indicate either a successful action (green text) or an error condition (red text).



The screenshot displays the GinnieMae AMC interface. At the top, a red notification ribbon contains the message: "Failed to submit all requests. Please contact the system administrators." Below this, the page title is "Access Request Approval". A blue "Back" button is located on the right side. The main content area shows the user's name and role: "Keith Jones - BANK OF AUKEY - BS\_2 - SF\_Loan Delivery and Pooling Authorized Signer (Single Family Issuer Loan Delivery and Pooling Authorized Signer)". A list of roles is displayed below, including "Single-family Issuer", "CM Issuer Access", "RPN Issuer Access", "eNotification User", "SecurID Token Holder", "Gmep2 User", "Issuer", and "AUTHORIZED GINNINET SIGNER". At the bottom right, there are "Reject" and "Approve" buttons. A progress bar at the bottom indicates "Pending Approvals" and "Review".

# TROUBLESHOOTING REGISTRATION INVITATION

- Three different errors may appear when sending an invitation to an end user:
  - Email is already registered
  - Three invitations sent alert
  - Five time invitation flag

**User Request**

▶  Details 

▾ Contents

 **Error: This email address is already registered in the system**  
This email address is already registered in the system

First Name

Middle Name

\* Last Name

\* Email

**User Request**

▶  Details 

 **Error: User Registration Request has been sent to this user more than 5 times. Please reach out to your administrator**  
User Registration has been sent to this user more than 5 times. Please reach out to your administrator.

First Name

Middle Name

\* Last Name

\* Email

 **Information**

A User Registration Request has already been sent to this user 3 times

# TROUBLESHOOTING END USER ERRORS

- End user errors related to logging into the system may be one of the following:
  - Invalid username or password
  - Incorrect OTP
  - OTP not received (this instance is not an error on login screens)



**GinnieMae**  
Our Guaranty Matters

Username or password entered incorrectly.

Username

Password

**LOGIN**

[Forgot Password?](#)



**GinnieMae**  
Our Guaranty Matters

To confirm your identity, enter the code sent to you in email.

Incorrect OTP. Please try again.

password:

8/5/2018 23:14 (EDT)

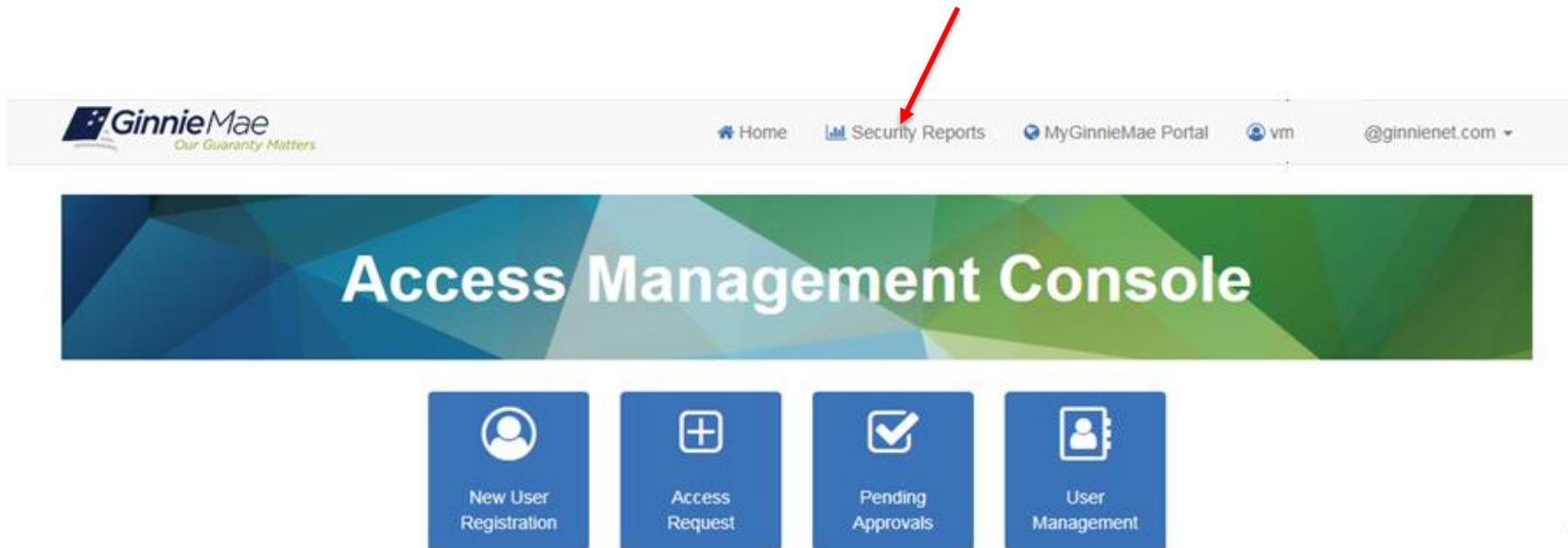
enter

silent beauties

[Not your image and phrase?](#)  
[What's this?](#)  
[Did not receive OTP?](#)

# REPORTS SYSTEM GENERATED

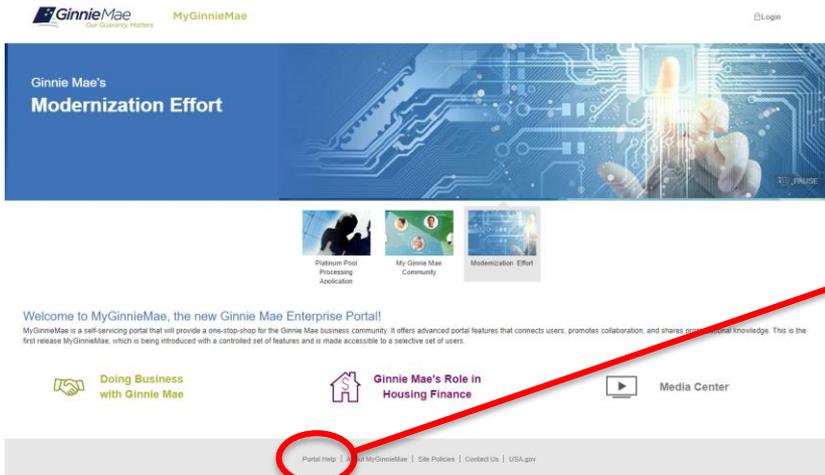
Several reports are available to Organization Administrators. These reports will be explained in the upcoming training for Organization Administrators on *Managing End User Accounts*. In the meantime, please refer to the weekly **User Access Onboarding Report** that will be emailed to the Org Admin group for each organization.



The screenshot displays the GinnieMae Access Management Console. At the top, the GinnieMae logo is on the left, and the navigation bar includes links for Home, Security Reports (highlighted with a red arrow), MyGinnieMae Portal, and vm, along with the email address @ginnienet.com. Below the navigation bar is a large banner with the text "Access Management Console". Underneath the banner are four blue buttons: "New User Registration" (with a person icon), "Access Request" (with a plus icon), "Pending Approvals" (with a checkmark icon), and "User Management" (with a person and gear icon).

# 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 6.



[Portal Help](#) | [About MyGinnieMae](#) | [Site Policies](#) | [Contact Us](#) | [USA.gov](#)

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](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), Option 6 or [ginniemae1@bnymellon.com](mailto:ginniemae1@bnymellon.com)
- Stay tuned for emails  
[ginniemae1@bnymellon.com](mailto:ginniemae1@bnymellon.com)  
[donotreply@access.ginniemae.gov](mailto:donotreply@access.ginniemae.gov)  
[laticia.j.jefferson@hud.gov](mailto:laticia.j.jefferson@hud.gov)

# EARLY ADOPTER PILOT PARTICIPANTS

Subservicers		
	<u>Subservicer ID</u>	<u>Subservicer Name</u>
1	1746	Dovenmuehle
2	4083	Celink
3	2813	Cenlar
Custodians		
	<u>Custodian ID</u>	<u>Custodian Name</u>
4	405	DEUTSCHE BANK
5	149 536	WELLS FARGO
6	894	BRANCH BANKING & TRUST
7	442 466	US BANK
HMBS		
	<u>Issuer ID</u>	<u>Issuer Name</u>
8	4157	Mr. Cooper (Nation Star LLC.)
9	4021	SUNWEST MORTGAGE COMPANY, INC
10	4211	PLAZA HOME MORTGAGE, INCORPORATED
Multifamily Issuers		
	<u>Issuer ID</u>	<u>Issuer Name</u>
11	3854	X-Caliber Capital
12	3866	Capital Funding
13	1535	Rose Community Capital
Single Family Issuers		
	<u>Issuer ID</u>	<u>Issuer Name</u>
14	4094	PENNYMAC LOAN SERVICES, LLC
15	2094	U. S. BANK, NA
16	4102	THE MONEY SOURCE INC.

## 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 1:** Target date for onboarding End Users
- **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