MyGinnieMae Early Adopter
Organization Administrator

Weekly Listening Session
## 10/23/2018

LISTENING SESSION **AGENDA**

- **Objectives**
- **Overview**
- **Access Request**
    - **Functional Role Request**
    - **Functional Role Approval**
- **Getting Help**
- **Key Dates**

October 23, 2018: Walk through the Access Request Workflow, with special attention to the unique steps for Subservicer Organizations.
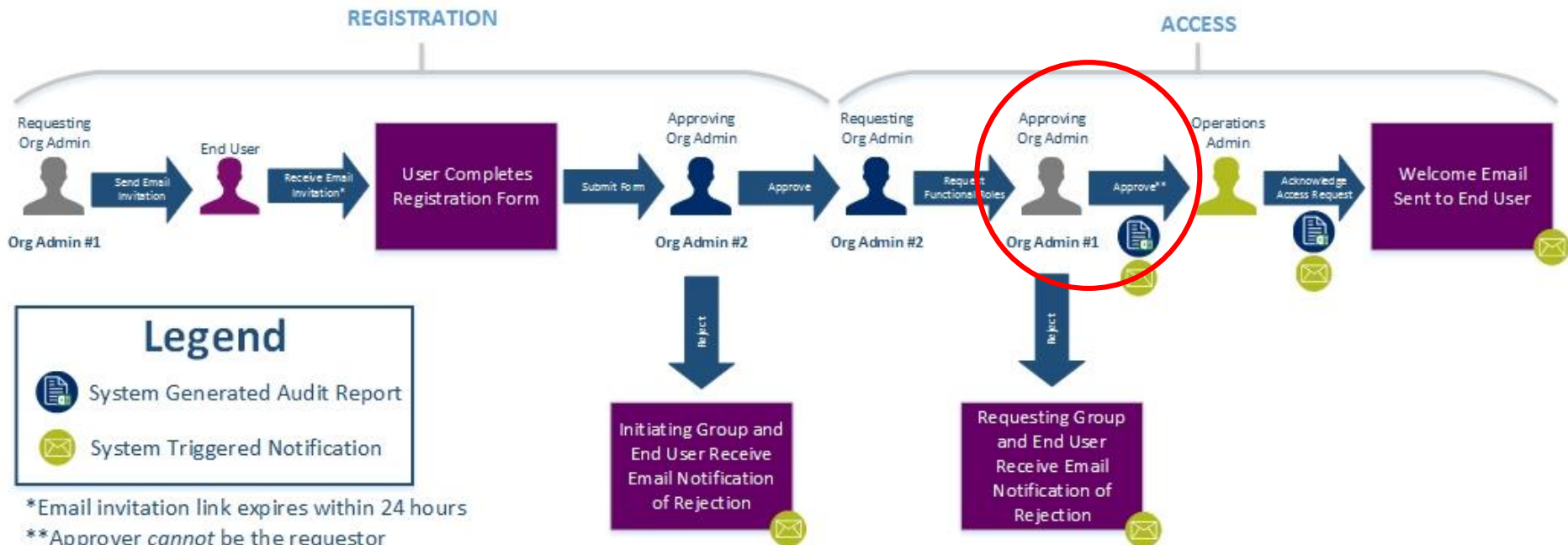
ACCESS **FUNCTIONAL ROLE REQUEST**

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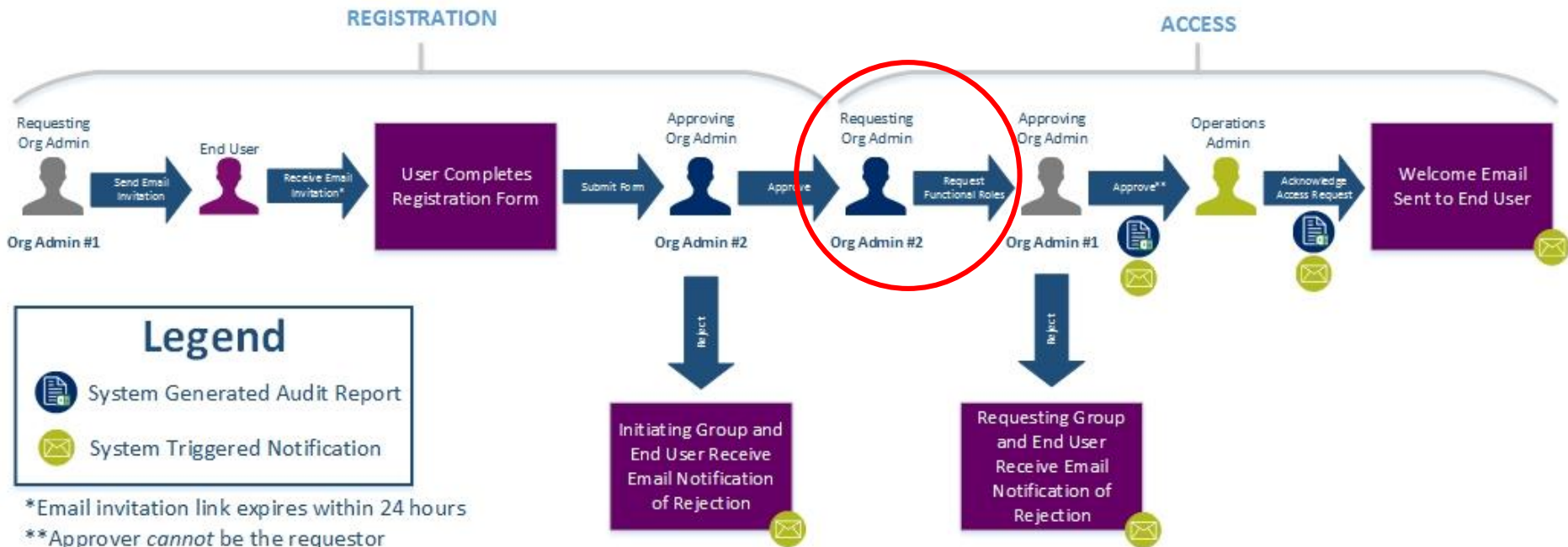
ACCESS **FUNCTIONAL ROLE APPROVAL**

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

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.

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 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

ROLE REQUEST **ORG ADMIN GUIDE**

Section 3.3 Request Functional Role

https://www.ginniemae.gov/issuers/issuer_training/
Documents/myginniemae_orgadmin_user_guide.pdf

SUBSERVICER **ORG SELECTION**

SUBSERVICER **MULTIPLE ORG SELECTION**

SUBERVICER **FUNCTIONAL ROLE REQUEST**

SUBSERVICER **MULTIPLE ROLES REQUEST**

- 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), Option 6 or ginniemae1@bnymellon.com
- Stay tuned for emails

  ginniemae1@bnymellon.com

  donotreply@access.ginniemae.gov

  laticia.j.jefferson@hud.gov

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