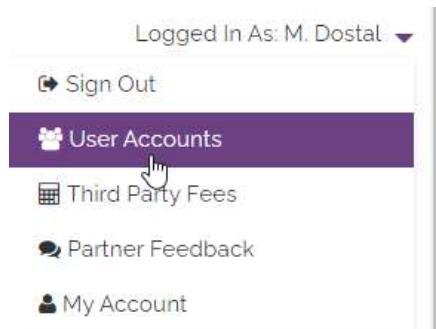


## Managing NDC User Accounts in UHMGO

- Users who have Manager access in UHMGO can do the following:
  - Add a user to the account and issue a temporary password
  - Edit user information
  - Delete a user from the account
  - Reset a user's Password
  - Reset a user's Challenge Questions
- To access this function, hover over the Logged In name on the upper right-hand corner of the UHMGO screen and then click on "User Accounts"



### Adding a User

- To add a user, fill in the fields on the screen. The required fields are indicated with a red asterisk.
- Multiple roles can be chosen for each user

A screenshot of the 'Add User' form in UHMGO. The form is divided into two columns. The left column contains fields for: First Name \*, Last Name \*, Title, Use Company Address? (Yes/No dropdown), Work Phone \*, Cell Phone, Fax, Email \*, Alternate Email, Company Roles \* (checkboxes for TPO Officer, TPO Processor, TPO Manager, Secondary, Closer, Post Closer), and Individual NMLS #. The right column contains: Account Username \*, Account Password \*, Enter Password Again, and Send alerts and notices via EMAIL? (Yes/No dropdown). A note specifies password requirements: 'Notes: Password must be at least 8 characters long, it must start with a letter and contain no spaces. Your password can only contain uppercase [A-Z] and lowercase [a-z] letters, digits [0-9], and any of these special characters @ \$ % ; : , ? = \_ \* ~ ^ + - # ! |'. At the bottom, there is a table for 'State licenses' with columns for State, License, Type, and Expires, and an 'ADD STATE' button.

- After filling in the required fields, including setting up the temporary password, click on "Email Password"



- The text of the email will then appear at the bottom of the screen
- Click on “Send Email”

Send a Password Reset Email.

SEND EMAIL CANCEL

To Email: mdostal@unionhomemortgage.com

Subject: TPO Account Login Credentials

Message: Hello Colin Closer,  
Here are the login credentials for your TPO Account.  
You may access your account by our website at: http://www.uhmgo.com.  
Username: ccloser  
Password: Uhmgo123!  
Regards,  
Maureen Dostal  
Paula Test Company

- The users in the roles of Secondary, Closer or Post Closer will immediately become active and have access to UHMGO
- The users in the roles of Loan Officer, Processor or Manager will not automatically become active. After a user in one of these roles is set up, an email is automatically sent to our TPO Admin who will then enable the user.
- The status of each user is shown in the list of employees at the top of the screen

	Colin Closer	Active	Closer	ccloser
	Joe Jones	Disabled	officer	jjones

- Once a user is set-up and active, they will be able to login to uhmgo.com

### Deleting a User

- Choose the user at the top of the screen by clicking on the pencil next to the user’s name
- To delete a user, click on “Delete” and then click “OK” in the pop-up message

CLEAR SAVE DELETE

Account Status: Active

Account Username: ccloser

First Name: Colin

Last Name: Closer

Title: Sr. Closer

Use Company Address?: Yes

RESET PASSWORD EMAIL PASSWORD

RESET CHALLENGE QUESTIONS

Send alerts and notices via EMAIL? Yes

Delete user account?

OK CANCEL

### Editing User Information

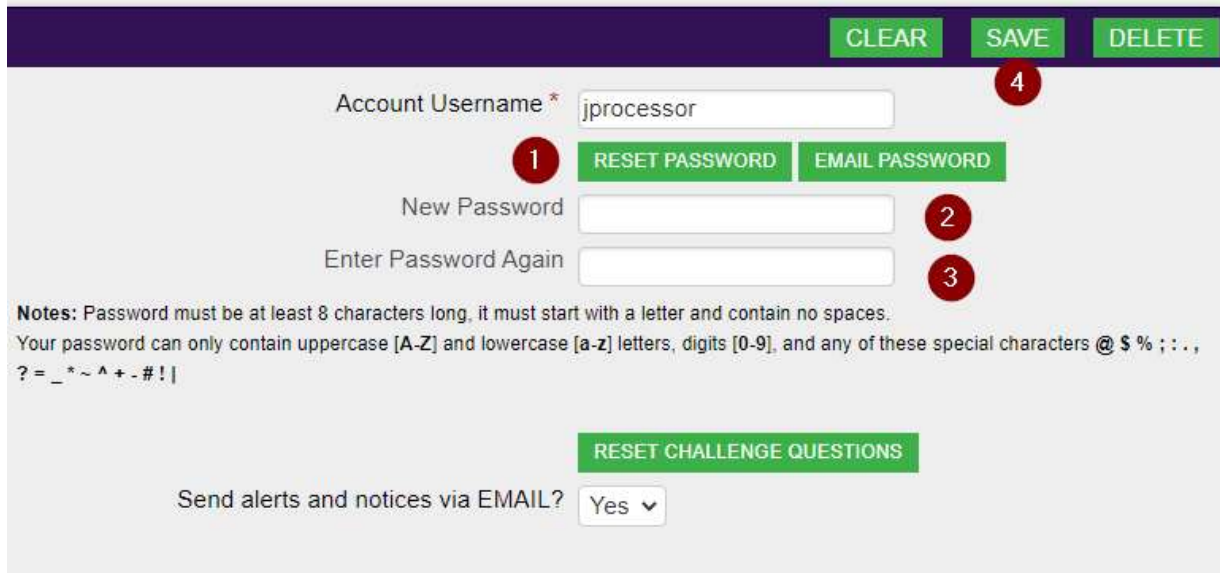
- Choose the user at the top of the screen by clicking on the pencil next to the user’s name
- Edit the information
- Click on “Save”

CLEAR SAVE DELETE

## Resetting a User's Password

To reset a password:

1. Click on "Reset Password"
2. Enter in a new password
3. Enter the new password again
4. Click on "Save"



The screenshot shows a password reset form with the following elements:

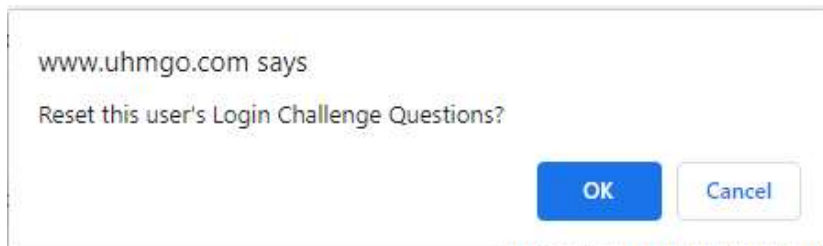
- Account Username \*: jprocessor (Callout 4 points to the top right of the form area)
- Buttons: CLEAR, SAVE, DELETE (top right)
- Buttons: RESET PASSWORD, EMAIL PASSWORD (Callout 1 points to RESET PASSWORD)
- New Password: [ ] (Callout 2 points to the input field)
- Enter Password Again: [ ] (Callout 3 points to the input field)
- Notes: Password must be at least 8 characters long, it must start with a letter and contain no spaces. Your password can only contain uppercase [A-Z] and lowercase [a-z] letters, digits [0-9], and any of these special characters @ \$ % ; : , ? = \_ \* ~ ^ + - # ! |
- RESET CHALLENGE QUESTIONS (button)
- Send alerts and notices via EMAIL? Yes (dropdown menu)

## Resetting Challenge Questions

- To reset a user's challenge questions, click on "Reset Challenge Questions"

RESET CHALLENGE QUESTIONS

- Click on "OK" in the pop-up message



The screenshot shows a pop-up message dialog box with the following content:

- www.uhmgo.com says
- Reset this user's Login Challenge Questions?
- Buttons: OK, Cancel

## Choosing a User at the Loan Level

- Users are listed in their role's dropdown list at the Registration step of the loan submission process
  - A Loan Officer and a Processor must be chosen for each loan. Choosing a person in the other three roles is optional
  - If there is only one user assigned to a role, only that user will appear and will not need to be selected
  - If no users have been set up for a role, there will be no users to select

Channel: \*

Loan Officer: \*  1

Processor: \*  3

Secondary:

Closer:  2

Post Closer:

## Account Privileges by Role

- The matrix below displays the functions available in UHMGO for each role

Correspondent Account Privileges by Role

	TPO Officer	TPO Processor	TPO Manager	Secondary	Closer	Post Closer
Allow Access to All Loans	No	Yes	Yes	Yes	Yes	Yes
Allow Pricing Loans	Yes	Yes	Yes	Yes	No	No
Allow Locking Loans	Yes	Yes	Yes	Yes	No	No
Allow Registering Loans	Yes	Yes	Yes	No	No	No
Allow Editing Loans	Yes	Yes	Yes	No	No	No
Allow Uploading Documents	Yes	Yes	Yes	No	Yes	Yes
Allow Uploading Conditions	Yes	Yes	Yes	No	Yes	Yes
Allow Submitting Loans	Yes	Yes	Yes	No	No	No
Allow Running AUS / Credit	Yes	Yes	Yes	No	No	No
Allow Editing User Accounts	No	No	Yes	No	No	No
Allow Editing Lender Fees	Yes	Yes	Yes	No	Yes	No
Allow Archiving Loans	No	No	Yes	No	Yes	Yes

## UHMGO Notifications Sent According to Role

#	Notification	TPO Loan Officer	TPO Admin / Manager	TPO Processor	TPO Closer	TPO Post Closer/ Shipper	TPO Secondary/ Lock Desk
1	When Loan has been Registered	x	x	X			x
2	When loan has been Submitted	X	X	X			X
3	When Credit Package has not been submitted or is missing required items	x	x	X			
4	When NDC Loan has been submitted to underwriting	x	x	X			
5	When NDC Initial UW Review Complete	x	x	X			
6	When NDC Loan has been resubmitted to underwriting	x	x	X			
7	When Loan Conditions have been updated	x	x	X			
8	WHEN NDC loan has received final UW approval	x	x	X	x		
9	When Initial Closing Disclosure has been sent to Borrower(s)	x	x	X	x		
10	When Lock has been confirmed	x	x	X			x
11	When Rate Lock Confirmation, Extension, Update, Rerock	x	x	X			x
12	When NDC Pre-Close Review with Conditions	x	x		x		
13	When NDC Pre-Close Review Conditions Received	x	x		x		
14	When NDC Pre-Close Review Conditions Updated	x	x		x		
15	When NDC Pre-Close Review complete	x	x		x		
16	When Closing Date scheduled and instructions sent to Title	x	x		x		
17	When Closing Package and Final CD has been sent (NOT SET UP FOR DELIVERY)	x	x		x		x
18	When NDC Closed Loan Package Received	x	x		x	x	
19	When NDC original Note received	x	x			x	
20	When NDC Closing Package Conditions Added	x	x			x	
21	When NDC loan clear for purchase	x	x			x	x
22	When Loan has been FUNDED/WIRE SENT	x	x			x	x