



Date: January 30, 2017

Announcement #2017w-07

Topic: LOIS Portal - Broker Admin Role Updates

## PBM Announcement

Source: PBM Empower Support & Information Security

Distribution: PBM Wholesale

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The following Portal task has been completed and released to production:

1. **Update Broker Admin Role** – (Task 1647)

The majority of the items added through this task were for the Corporate Admin level, but there are a few items that pertain to our Brokers, Account Executives & Origination Supervisors.

**These updates are as follows:**

- a. Create an '**Admin Broker LO Set Up**' role that our Account Executives and Wholesale Origination Supervisors can utilize. Once assigned to this role, it will be used to create a new user account and properly assign new users to the correct broker, without having full admin access. The Admin Broker LO Set Up role can view/add/edit the broker users screen and impersonate users from that screen.
- b. Automate the UserID field to reflect the broker company NMLS number and the first initial, last name when a new Broker Loan Officer is created.  
Example, 1234fwarren. If this exists at time of creation, add a numeric digit to the end. Example, 1234fwarren1 and so on.
- c. Automate the assignment of the appropriate branch and Account Executive when setting up a new Broker Loan Officer.

d. Email Link to Coordinator Teams

An email link has been added to the Admin screen that will allow the Information Security Officer to email the appropriate Wholesale Coordinator group, if there are any issues with verifying the NMLS number for a new Broker Loan Officer ID.

Cost Center 351 = [pbms.calwhlcoordinators@myprovident.com](mailto:pbms.calwhlcoordinators@myprovident.com)

Cost Center 354 = [pbnmc.alwhlcoordinators@myprovident.com](mailto:pbnmc.alwhlcoordinators@myprovident.com)

A sample of the email subject line and content are below.

**LOIS - NEW BROKER LOAN OFFICER REGISTRATION REQUEST**

There was a problem adding a requested broker loan officer to PBM Web Portal. The NMLS number provided either does not match up with the name of the person provided or the NMLS number is tied to the wrong broker company. Please work with the broker to correct the issue then call ext.16122 or email IT Security at [ITSecurity@myprovident.com](mailto:ITSecurity@myprovident.com) once the issue has been resolved so they can complete the verification process timely.

Broker: 70 - CAPITAL LINE FUNDING GROUP, INC.  
Account Executive: VERA YBARRA  
User: Cesar Gonzalez  
NMLS: 589632

e. Automatically disable users w/no loan activity past 6 months. Also, send notifications 7 days prior to user to tell them their account is being disabled.

a. Portal ID's that have not had loan activity or have not been the originator over 6 months, will automatically be deactivated.

b. Portal ID's within 7 days of approaching the 6 month mark will receive an email notification to tell them their account will be disabled for inactivity. See sample email below.

