

JOB AID

NEW USER ACCT. REQUEST / ACCOUNT RESET



NEW USER ACCOUNT REQUEST:

1. Email the following details to nabercrombie@firstreliance.com and jhigdon@firstreliance.com .
 - a. *Team Member Name*
 - b. *Team Member Phone Number*
 - c. *Team Member Email*
 - d. *Individual NMLS Number (if applicable)*
 - e. *Role of Associate / Access Level Requested (i.e. Manager, Originator, Processor)*
 - f. *Any Special Instructions Related to Access Level Requested*
2. The New Team Member will receive an email link to establish their initial password.
3. The Initial Password email expires one hour from the time it is generated. If the link expires before the team member establishes their initial password, they should email nabercrombie@firstreliance.com and jhigdon@firstreliance.com to request a new password email.

IMPORTANT NOTES ABOUT NEW ACCOUNTS:

- The default setup for support staff will be to access all loan files for the organization.
- Filters can be placed to limit access to specific originators, please include this detail in the original account request if necessary.
- Managerial access is required to create loan files for multiple originator accounts. If you have a user who needs to create their own loan files as well as those of other originators, they should be requested to have a Manager Access Level.

ACCOUNT RESET (IF USER IS LOCKED OUT):

1. Email the impacted User ID to nabercrombie@firstreliance.com and jhigdon@firstreliance.com and request an account reset.
2. The Team Member will receive an email link to establish a new password.
3. The Password reset email expires one hour from the time it is generated. If the link expires before the team member establishes their initial password, they should email nabercrombie@firstreliance.com and jhigdon@firstreliance.com to request a new password email.