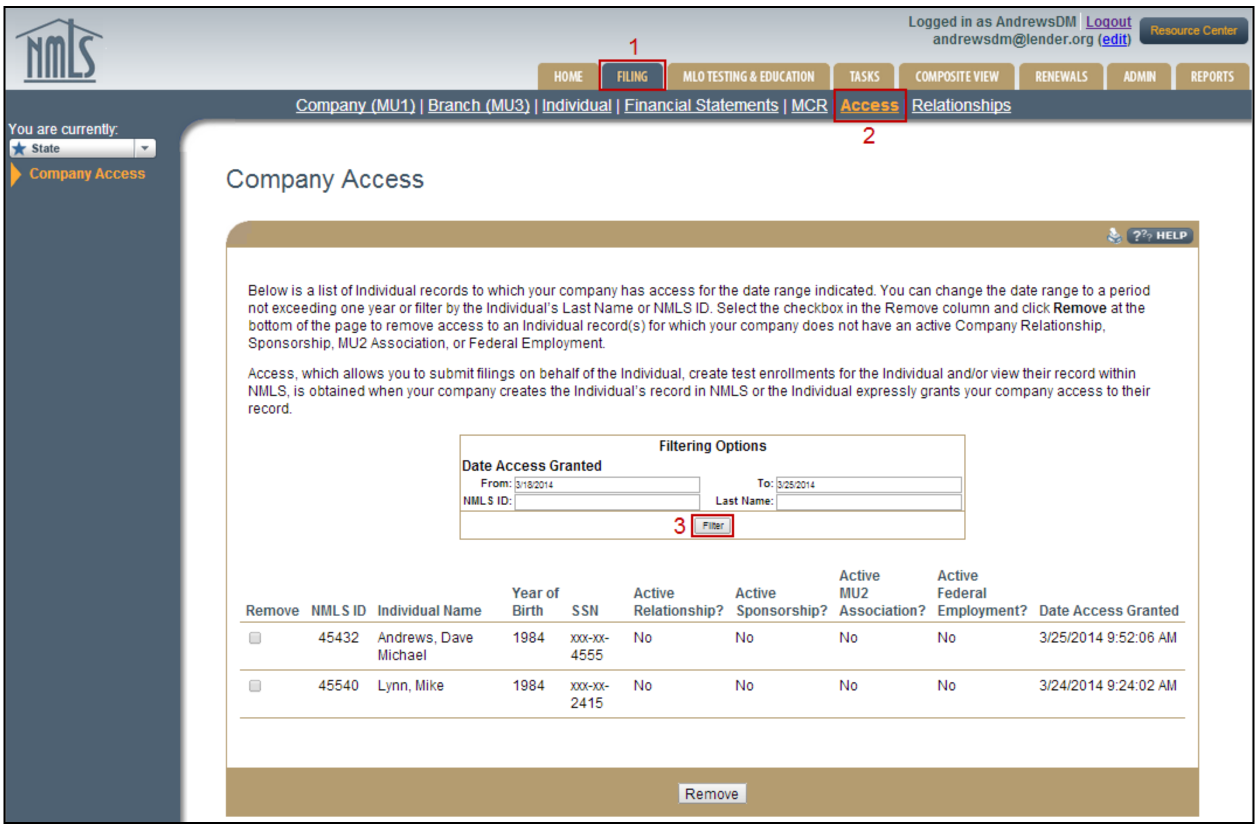
Once the company and individual have applied for their license in the appropriate state, the state may require that a relationship and sponsorship be established by the company. Establishing a *relationship* with an individual indicates to the regulator that the individual is employed by your company, whereas *sponsorship* indicates that the company will be supervising the individual's license. Only the company can establish a relationship and sponsorship. This guide also contains information on updating an employee's *worker classification*.

Create a Company Relationship

1. Log in to your company NMLS account and confirm that the individual you need to establish a relationship has granted your company access. The steps below will walk you through confirming access.

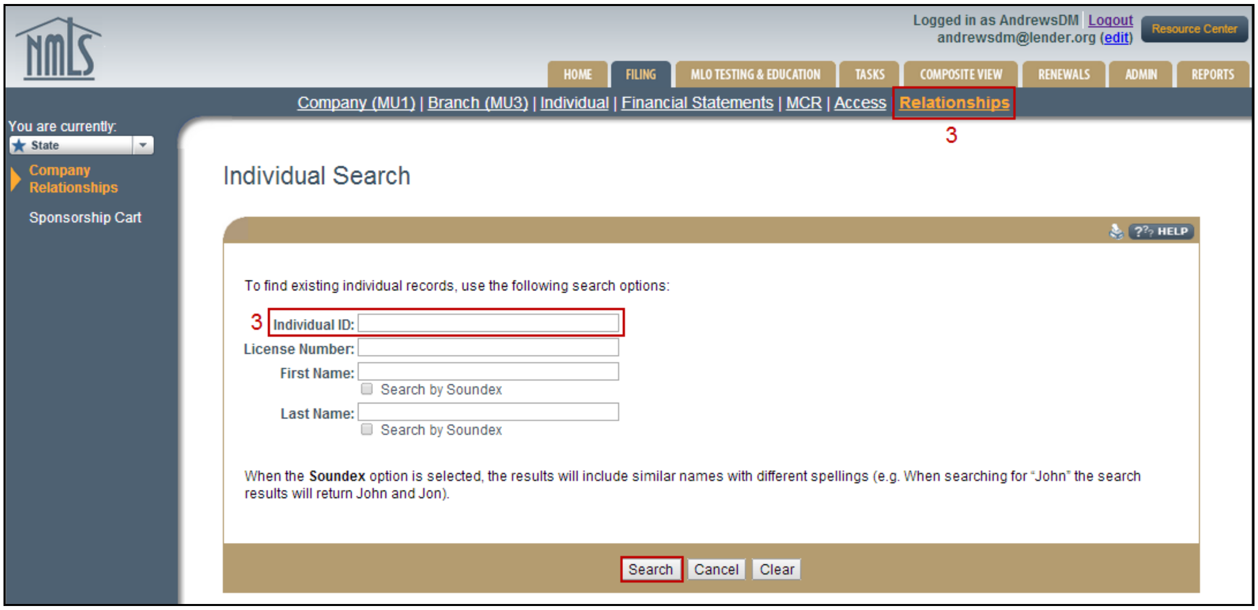
   Step 1: Click the **Filing** tab.
   Step 2: Click the **Access** link in the sub-menu.
   Step 3: Filter to obtain the list of access.



NOTE: If the individual you wish to manage has not given your company access, instruct them to do so. You can provide them with the Providing Access to a Company Quick Guide to the MLO to assist with this process.

2. The Active Relationship column indicates whether or not the company has an active relationship with an individual. If the column indicates “No”, take note of the Individual’s ID number you wish to create the relationship with.

3. Click the **Relationships** link in the sub-menu and enter the **Individual’s NMLS ID** number.



4. Click the **NMLS ID number** hyperlink beside their name.

5. Click the **Create Company Relationship** button.

6. Enter the **Employment/Association Date** and click the **Save** button.

7. Check the box beside the Registered Location the individual works. At least one registered location must be selected for each individual.

   NOTE: The relationship start date cannot be a future date. Only licensed locations with a filing previously submitted will appear. To change locations, select the new location *before* removing the old location to avoid the sponsorship being dropped (when applicable).

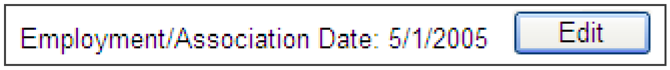
The system will reflect an **Active Company Relationship** between the company and the individual.

Once the relationship has been created, if the relationship start date (Employment/Association Date) needs to be updated, the following steps will allow you to edit the relationship start date.

1. From the Company Relationships section, search for the individual.

2. Once selected, select the Edit icon ( ) to edit the Relationship.

3. Click the **Edit** button next to the Employment/Association Date.



4. Enter the correct date and click **Save.**

Create a Sponsorship Request

A sponsorship request can only be submitted once a relationship has been established with an individual. The following steps will walk you through submitting a sponsorship request through NMLS.

1. Click the **Relationships** link from the sub-menu and enter the Individual's NMLS ID number.

2. Click the NMLS ID number hyperlink beside their name.

3. Under **Active Company Relationship** click the Edit icon ( ).

4. Click the **Add Sponsorships** button at the bottom of the page.

5. Select the license(s) the company will sponsor by checking the box, and then click the **Add to Cart** button.

   NOTE: A company can only sponsor a license/registration where the company has filed a license/registration.

6. The **Sponsorship Cart** screen will list a breakdown of the licenses to be sponsored and the sponsorship fee associated with each.

   NOTE: A sponsorship fee will be charged when a change in sponsorship request is made. Only a company can sponsor a license, therefore the fee is payable by the company. A $30 processing fee along with any State Agency sponsorship fee will be charged. (There is no charge for first time sponsorship in NMLS).

7. After review of fees, click the **Proceed to Invoice** button.

8. Click the **Pay Invoice** button and enter all payment information.

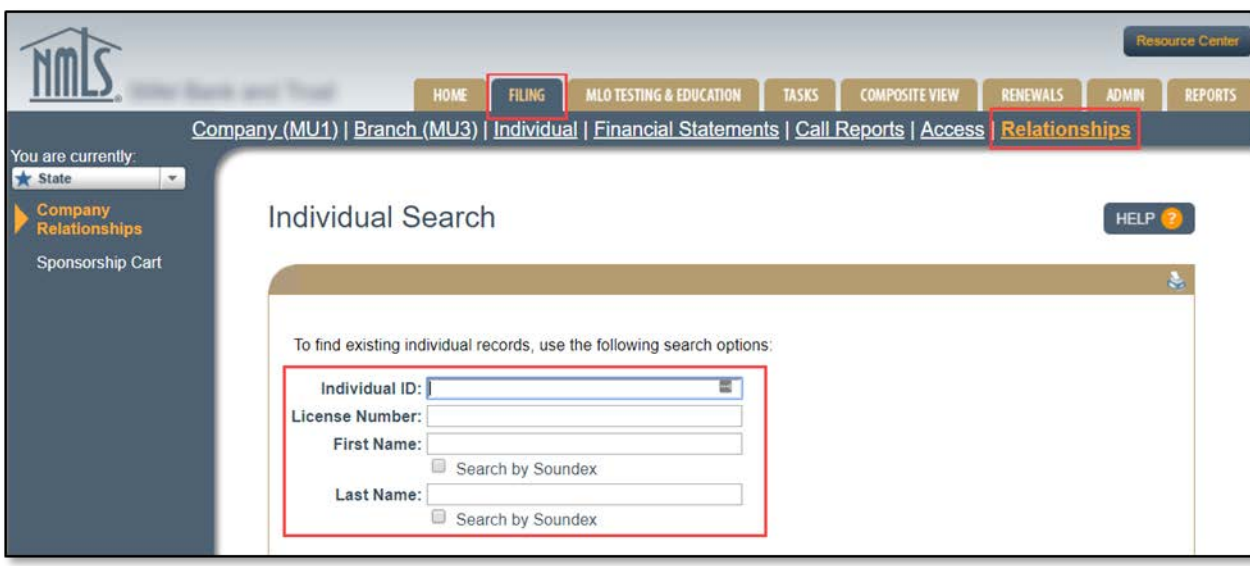
9. The sponsorship request will be forwarded to the appropriate regulator for review.

How to Edit an Individual's Worker Classification

1. Log into NMLS with your company username and password.
2. Accept the Industry Terms of Use.

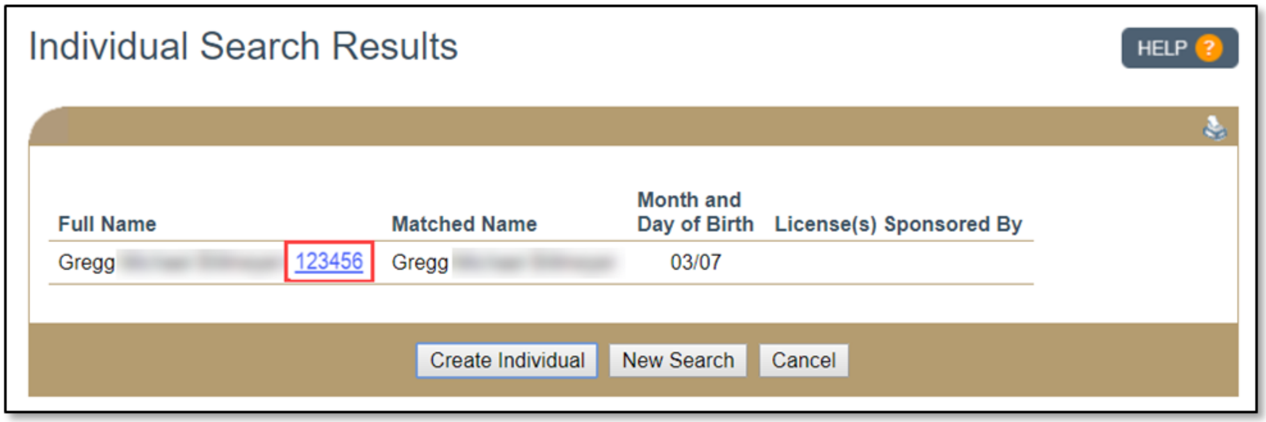
Note: The information message, "One or more individuals you have a relationship with does not have worker classification information filled in," continues to appear on the dashboard until every MLO associated with the company has been classified as a W2 employee or Non-W2 Employee.

3. Click the **Filing** tab.
4. Click the **Relationships** hyperlink on the submenu.
5. Search for the individual by typing his or her NMLS ID number into the Individual ID field.

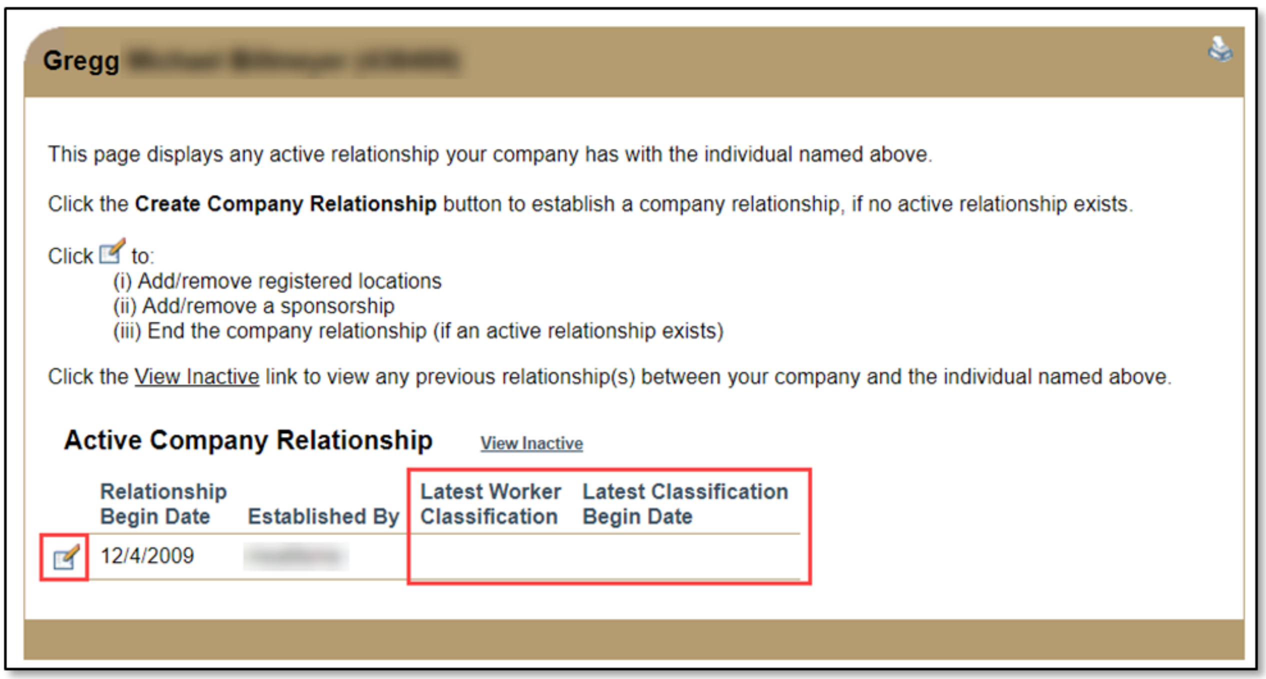


6. Click the **Search** button.

7. Click the individual's hyperlinked NMLS ID number.



8. Click the **edit icon** to change the active company relationship for this individual.

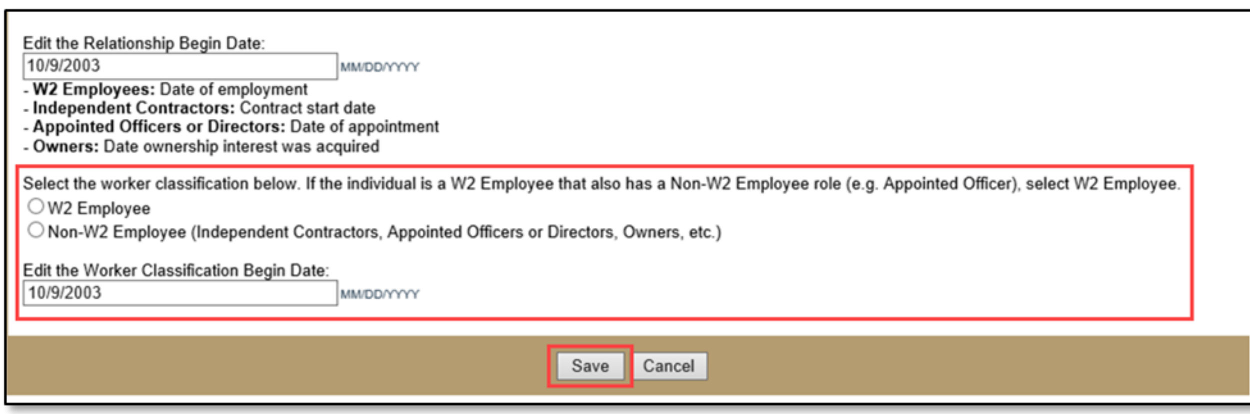


NOTE: The Company Relationships screen shows the details of the individual's relationship with the company, including the worker classification status.

9. Click the **Edit** button.

10. Select the radio button for W2 Employee or Non-W2 Employee.
11. Enter the Worker Classification Begin Date.

    NOTE: The Worker Classification Begin Date is most likely the same as the Relationship Begin Date. However, for example, if the individual changed from a Non-W2 Employee to a W2 Employee after the relationship was established, the corresponding Worker Classification Begin Date would be the date when the individual became a W2 Employee.
12. Click the **Save** button. A message appears confirming the classification was saved.



13. Click the **Cancel** button to return to the Filings page. Or select any other tab to navigate to the desired section in the record.

Questions? Contact the NMLS Call Center at 1-855-665-7123.