[NMLS User Experience Group Helps Set Direction for Upcoming NMLS Enhancements]

BLOG POST

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Mortgage companies in NMLS are linked to the mortgage loan originators (MLOs) they employ through a designation in the system referred to as a "relationship and/or sponsorship." As part of upcoming changes to NMLS, it will become easier for mortgage companies to navigate the "relationship and/or sponsorship" section of the system.

In preparation for upcoming NMLS changes for how company relationships and sponsorships are managed, NMLS staff interviewed NMLS User Experience Group (NXg) participants to gain insight from their user experience. The NXg is a pool of NMLS users and stakeholders who volunteer to be a part of NMLS discovery and development activities.

NMLS staff's goal was to get a deeper understanding of and improve the user experience for managing relationships and sponsorships in NMLS. Focus areas included:

- Creating a new relationship and/or sponsorship.
- Modifying an existing relationship and/or sponsorship.
- Ending an existing relationship and/or sponsorship.

Conducting the interviews

During the interviews, NXg participants completed A/B tests related to how the relationship and sponsorship page should be structured. A/B testing is a method of comparing two versions of a webpage, email, or other digital assets to determine which performs better based on user behavior, helping to optimize for better results. All participants preferred the full-page view (shown below) and believe it will provide a better user experience. Reasons included:

- Fewer clicks to access information.
- It is extremely helpful to view one screen with the NMLS number, location, and address.
- All information is in one place, requiring fewer clicks to view sponsorships information and location.

The image below is a depiction of how a "relationship and/or sponsorship" screen in NMLS could appear once this section has been modernized. Note: This system update is not final and may appear differently once implemented in NMLS.



The NXg interview participants also provided the following recommendations:

- Replace “Sponsorship Date” with “Sponsorship Start Date” and “Sponsorship End Date” in the Sponsorship section.
- Add “Sponsorship Status” after “Location Status” in the Sponsorship section.
- Add helper text in field “Search by Location or NMLS ID” for search on the Company Relationship modal.
- Change the button “Sponsor Approved Licenses” to “Sponsor Licenses.”
- Provide reporting options and historical views, for auditing and assessment of loan offices, agencies and companies.

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