

Add New Users in SPARC

Correspondent Lender Cheat Sheet | SPARC

© Arc Home, LLC | June 2021 | All rights reserved.

Objective: This cheat sheet was designed to assist you in adding new users to SPARC. Please note that Arc Home will create profiles for the Correspondent Owner and an original set of Admin users. ONLY Arc Home can add additional Admin users (called “supervisors” in the system), but multiple admins/supervisors are permitted.

Note: If you don’t want a user to see pricing and lock confirmations, do not set them up with SPARC credentials

Process:

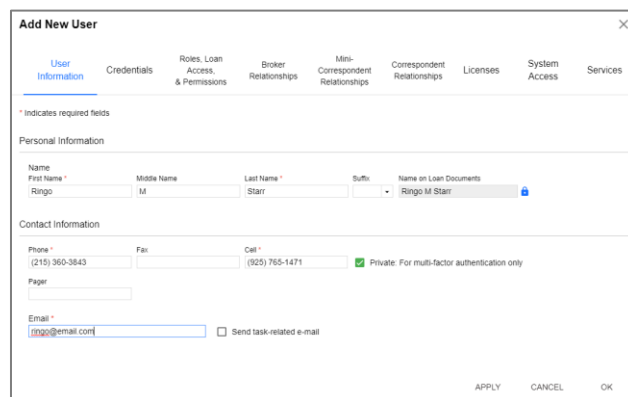
Step 1: You must be an Admin/Supervisor to add or edit existing users in SPARC

Step 2: Click **Manage Portal** from the main Pipeline view

Step 3: Click “**Manage Users**” to search for, edit existing users, or Add New User(s)

Step 4: Click the **Add New User** button and complete the fields with the red asterisk for each tab:

1. Enter user’s First Name.
2. Enter user’s Last Name.
3. Enter user’s phone number.
4. Enter user’s cell phone number **NOTE:** the cell phone number is required to send an SMS text for authentication upon initial sign on.
5. Enter user’s email address



Note: Do not check the box, Send task-related e-mail

Step 5: Credentials

Note: If you don't want a user to see pricing and lock confirmations, do not set them up with SPARC credentials

1. Enter user's Login Name. Login name cannot be duplicated.
2. Create Password for user based on password requirements (10 characters, numbers, letters, capital and lowercase, and a special character)
3. Retype password.
4. Password expires every 60 days.
5. Select Active (or Inactive if removing access)

The screenshot shows the 'Edit User' interface with the 'Credentials' tab selected. The 'Login Information' section includes a 'Change login and password?' checkbox, a 'Login Name' field with the value 'jocan', a 'Password' field with a 'GENERATE' button, and a 'Retype' field. Below these are three radio button options: 'Must change password at next login' (selected), 'Password never expires', and 'Password expires on'. A checked checkbox indicates 'Expire passwords every 60 days following update'. The 'Status' section has 'Active' selected. At the bottom right are 'APPLY', 'CANCEL', and 'OK' buttons.

Step 6: Roles, Loan Access & Permissions

1. Roles - If the user will be registering/locking loans, they **MUST** have **Secondary Role**. If the user will be submitting the loan for Arc Home Underwriting, they **MUST** have the **Processor Role**. If the user will be uploading the Closed Loan Package for Purchase Review, they **MUST** have the **Post-Closer Role**.

Note: To provide users with the ability to view pricing, lock loans and use the Quick Pricer, assign **Secondary role**. The Secondary role will not have access to the Purchase Advice. If the user needs access to view the Purchase Advice as well, include the **Post Closer role**.

2. Loan Access Level – This will determine the user's access to the pipeline.
 - a. Corporate – within company – If assigned the user will be able to see all loans in the pipeline regardless of assignment. This access is suggested for processors who may be working with multiple loan officers.
 - b. Individual – only if assigned. If assigned the user will only be able to see the loans assigned or created in his/her name.
3. Permission – This determines if the user will be able to view and or create loans within SPARC. **Choose only Allow viewing correspondent channel loans and/or allow creating correspondent channel loans.**

Edit User

User Information Credentials **Roles, Loan Access, & Permissions** Broker Relationships Correspondent Relationships Licenses System Access Services

Roles *

Loan Officer
 Processor
 Secondary
 Post-Closer

Loan Access Level

Corporate - within company
 Individual - only if assigned

Permissions

Allow viewing wholesale channel loans.
 Allow creating wholesale channel loans.
 Allow viewing correspondent channel loans.
 Use eligibility only pricing engine for Correspondent loans.
 Allow creating correspondent channel loans.

Step 7: Licenses

1. Enter the NMLS ID if applicable for the user
2. Use the “Add License” button to associate a State License

Add New User

User Information Credentials Roles, Loan Access, & Permissions Broker Relationships Mini-Correspondent Relationships Correspondent Relationships **Licenses** System Access Services

Nationwide Mortgage Licensing System and Registry

Loan Originator NMLS ID

State Licenses

ADD LICENSE

License #	State	Expiration Date
<input type="text" value="12345678"/>	CA	<input type="text" value="12312019"/>

remove

APPLY CANCEL OK

Step 8: Click “OK” to save all changes and notify your new user of his/her username and password.

If you still require assistance, you can contact ITHelpDesk@archomeloans.com or 215-383-9220.

Access our SPARC portal or reset your SPARC password [here](#). Through a series of prompts and email verification, the user will be able to reset their password quickly and at any time of the day.