Financial & Corporate Compliance

Configuring HMDA *Wiz*® in Wolters Kluwer Loan Products

ARTA® Lending, ComplianceOne® Lending, ComplianceOne®/Vanceo™ Assumptions, ComplianceOne®/Vanceo™ Mortgage, and idsDoc/ComplianceOne® Plus

 Wolters Kluwer

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File   Configuring *Wiz*® SaaS Suite in Wolters Kluwer Loan Products

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ARTA® Lending

ARTA® Lending users who submit HMDA data to HMDA *Wiz*® can follow the steps below to update the User name and Password in ARTA® Lending after the *Wiz*® SaaS Suite 6.3 release.

Please Note: The steps that follow must be performed for each user who submits HMDA data from ARTA® Lending.

1. Log into ARTA® Lending.
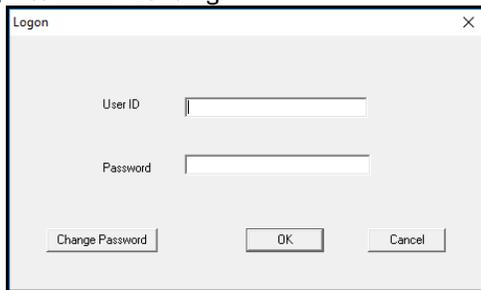
2. Expand **General Setup**.
3. Select **User**.
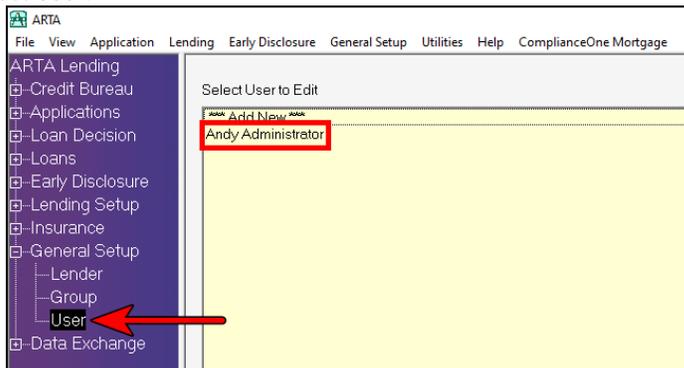
4. Double-click the user to view the **User Setup** screen.
5. Scroll down and enter the **HMDA Wiz User name** and **Password**.
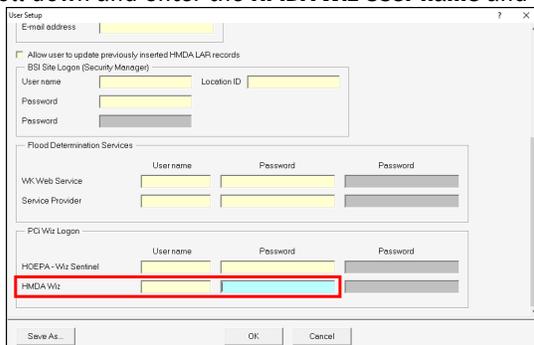
6. Click **OK** to save and exit.
7. Repeat steps 3 – 6 for each user who submits HMDA data.

ComplianceOne® Lending

ComplianceOne® Lending users who submit HMDA data to HMDA *Wiz®* can follow the steps below to update the UserName and Password in ComplianceOne® Administration after the *Wiz®* SaaS Suite 6.3 release.

1. Log into ComplianceOne® Lending.
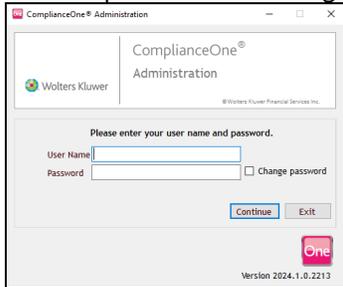
2. On the **Setup** tab, select **Organizations**.

3. Double-click an organization to view the **Setup** screen.

4. Select **Partners**.

5. Scroll down and click **HMDA Wiz** to view the **Details**.
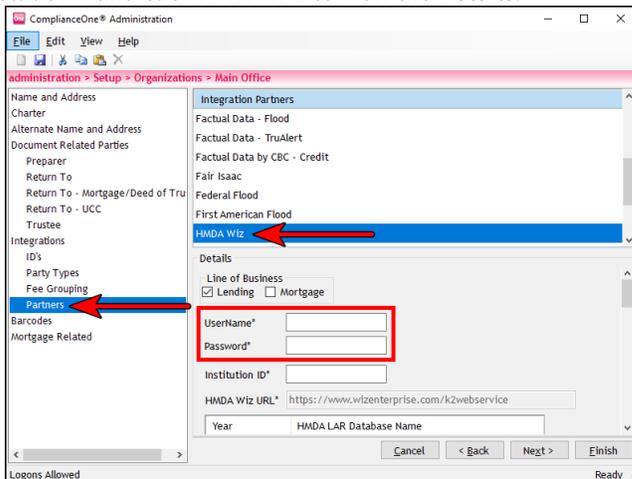
6. Enter the **UserName** and **Password**.

7. The Institution ID is not used but cannot be left blank. Enter a number (I.e. your WK Customer Number).

8. Click **Finish** to save and exit.

9. Repeat steps 3 – 8 for each organization that submits HMDA data.

ComplianceOne® / Vanceo™ Assumptions

ComplianceOne® Assumptions users who submit HMDA data to HMDA *Wiz*® can follow the steps below to update the Username and Password in Interface Manager after the *Wiz*® SaaS Suite 6.3 release.

1. Log into ComplianceOne® or Vanceo™ Assumptions.

2. Click **Manage**.
3. Select **Interface Manager** in ComplianceOne or **Interfaces** in Vanceo.

4. Locate and click **HMDA Wiz**.

5. Select **PARAMETERS AND RESOURCES**.

6. Enter the **HmdaWizUser**
7. Hover over the **HmdaWizPassword** row and click the **Edit Password** button to enter the **Password**.
8. Click **Settings** to save the changes.
9. You can close the Interface Manager tab when done.

ComplianceOne® / Vanceo™ Mortgage

ComplianceOne® Mortgage users who submit HMDA data to HMDA *Wiz*® can follow the steps below to update the Username and Password in Interface Manager after the *Wiz*® SaaS Suite 6.3 release.

1. Log into ComplianceOne® or Vanceo™ Mortgage.

    Username

    E.g., firstname.lastname@company.com

    Password

    Forgot password?

    Log In

2. Click **Manage**.
3. Select **Interface Manager** in ComplianceOne or **Interfaces** in Vanceo.

4. Locate and click **HMDA Wiz**.

5. Select **PARAMETERS AND RESOURCES**.

6. Enter the **HmdaWizUser**
7. Hover over the **HmdaWizPassword** row and click the **Edit Password** button to enter the **Password**.
8. Click **Settings** to save the changes.
9. You can close the Interface Manager tab when done.

idsDoc/ComplianceOne® Plus

idsDoc and ComplianceOne® Plus users who submit HMDA data to HMDA *Wiz*® can follow the steps below to update the Username and Password after the *Wiz*® SaaS Suite 6.3 release.

1. From **Settings** select **Company Settings**.
2. Select **Services** and enter the new **USER NAME** and **PASSWORD**.
3. Click **Save Changes**.

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