Chapter 18: Secure Systems

Table of Contents

Chapter 18: Secure Systems 18-1

18.1 Introduction 18-2
18.1.1 Type of Users 18-2

18.2 Registering for a User ID 18-3
18.2.1 Coordinator Registration 18-5
18.2.2 User Registration 18-9

18.3 Secure Connection 18-13
18.3.1 Making a Secure Connection 18-13
18.3.2 Your Password 18-16

18.4 System Administration for Coordinators 18-18
18.4.1 Establishing yourself as a coordinator in iREMS 18-20

18.5 Providing a User with System Access 18-25
18.5.1 Retrieving the User ID 18-25
18.5.2 User Roles 18-27
18.5.3 Contract Assignment 18-29

18.6 Business Partner Relationships 18-33

List of Figures

Figure 18-1. REAC Home page 18-3
Figure 18-2. Online Systems page 18-4
Figure 18-3. Need a User ID? page 18-4
Figure 18-4. Registration Form 18-5
Figure 18-5. Coordinator Registration Confirmation 18-7
Figure 18-6. Registration Accepted for Further Processing 18-8
Figure 18-7. Standard User Registration Confirmation 18-11
Figure 18-8. User Registration Accepted for Further Processing 18-12
Figure 18-9. Connect to Hudapps box 18-13
Figure 18-10. Legal Warning page 18-14
Figure 18-11. Secure Systems Main Menu 18-14
Figure 18-12. PBCA iREMS home page 18-15
Figure 18-13. Change User Password 18-17
Figure 18-14. Reset Password page 18-18
Figure 18-15. Secure Systems Main Menu 18-19
Figure 18-16. User Maintenance page 18-20

Figure 18-17. Maintain User page 18-21
Figure 18-18. Assign/Unassign Actions for User (1of 2) 18-21
Figure 18-19. Assign/Unassign Actions for User (2of 2) 18-22
Figure 18-20. Successful Transaction box 18-22
Figure 18-21. Assign/Unassign Roles for User (1of 2) 18-24
Figure 18-22. Assign/Unassign Roles for User (2of 2) 18-24
Figure 18-23. Assign/Unassign Role Confirmation for User page 18-25
Figure 18-24. User Maintenance page 18-26
Figure 18-25. iREMS roles 18-27
Figure 18-26. Assign/Unassign Role Confirmation for User page 18-28
Figure 18-27. Successful Transaction box 18-28
Figure 18-28. Assign/Unassign Role Confirmation for User page 18-29
Figure 18-29. Assistance Contract Assignment Maintenance page 18-30
Figure 18-30. Assign Contract page 18-31
Figure 18-31. Assign Assistance Contract Confirmation page 18-32
Figure 18-32. Business Partners Maintenance 18-33
Figure 18-33. Add/Delete Relationships page 18-34
Figure 18-34. Add/Delete Relationships Confirmation page 18-34
Figure 18-35. Business Partners Maintenance page 18-35
Figure 18-36. Activate Relationships page 18-36

18

Secure Systems

Sensitive information is accessed and transmitted through the HUD website on the Internet. Therefore, a secure environment was developed to ensure that HUD's information is protected.

An Internet user can access HUD's system information only after registering for a Coordinator or User's ID.

Objectives:

By the end of this chapter, you will be able to:

- Register for Coordinator and User IDs
- Establish Coordinator Roles
- Provide Users with system access
- Designate system roles for the User

18.1 Introduction

The purpose of this chapter is to familiarize PBCAs with HUD's Web-based security software. To protect the integrity, availability, and confidentiality of HUD information, proper security measures were established. For example, a user ID and password are required to access HUD's secure systems. Potential users can register on-line for a user ID and a password.

Once you receive your user ID, you can access the **Secure Systems** page, which comprises Multifamily Housing's systems. The systems allow PBCAs to submit as well as retrieve information from HUD. Authorized PBCAs can access MF Housing systems, which include:

- LOCCS
- **iREMS**
- TRACS Internet Queries

18.1.1 Type of Users

There are two types of Internet users: Coordinators and Users. The Coordinator serves as the PBCAs Executive Director's representative and performs the administration functions for the secure systems. The Coordinator assigns system rights and roles to each user. A Coordinator is also responsible for forwarding information received electronically from HUD to the PBCA Executive Director.

Although a User can enter or submit data to HUD, they cannot control access to the system. A User depends on the Coordinator for the necessary system rights to enter, view, or submit data.

> ✍ *Note: The system limits each PBCA to two coordinators. It is recommended that the PBCA Executive Director designate two Coordinators to ensure backup for daily system administration needs.*

- **Coordinator -**Each PBCA must designate a Coordinator, typically an employee, to act as their representative in providing system access to Users. The Coordinator is responsible for retrieving the User's ID establishing the User's role in the system.
- **User -** Unlike a Coordinator, registered Users cannot control system access or perform system maintenance functions. The User must be assigned to a contract and be given the proper roles to add, delete or update data. The User is dependent on the Coordinator for system access as well as updating User information (e.g., email address).

> ✍ *Note: The term "user" is a generic term for individuals following the instructions of this guide. If "User" (with a capital 'U') is discussed, it refers to a specific type of Internet user (User v. Coordinator).*

18.2 Registering for a User ID

iREMS users access HUD-sensitive information over the Internet, therefore, security registration for a user ID is required. An Internet user can access system information only after registering and receiving their user ID, then being assigned system and PBCA data rights.

All Coordinators and Users must submit a completed registration application to HUD to obtain a user ID. The registration requires the applicant's name, social security number, email address, desired password and mother's maiden name, as well as, the PBCA's name and TIN/SSN. The registration form is available online from the REAC web page.

To access the online registration application (for Coordinators and Users):

1. Enter the following URL address: ***www.hud.gov/reac*** in the *Address* field from your Internet browser (e.g., Microsoft Internet Explorer). The **Real Estate Assessment Center (REAC)** home page displays.

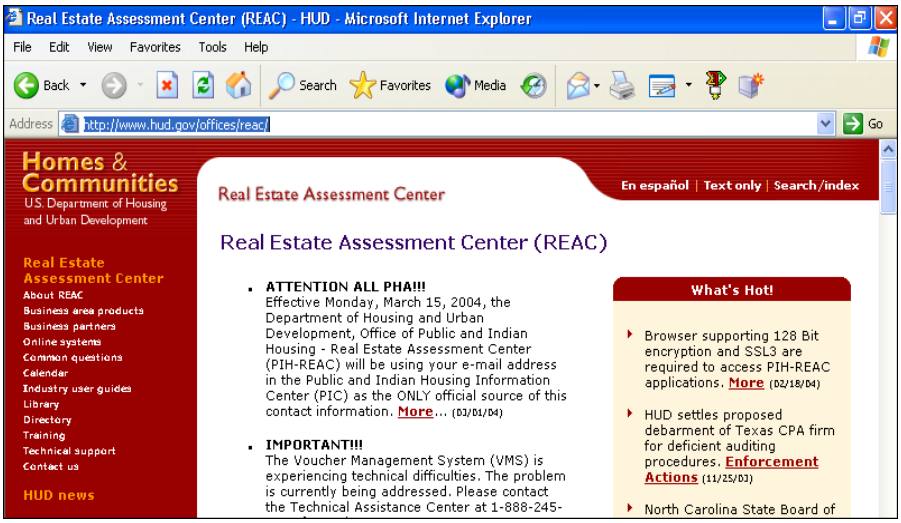


Figure 18-1. REAC Home page

> ✍ *Note: This page is updated on a regular basis, therefore, the appearance may vary.*

2. On the left side of the page, click on the Online systems link. The REAC **Online Systems** page displays.

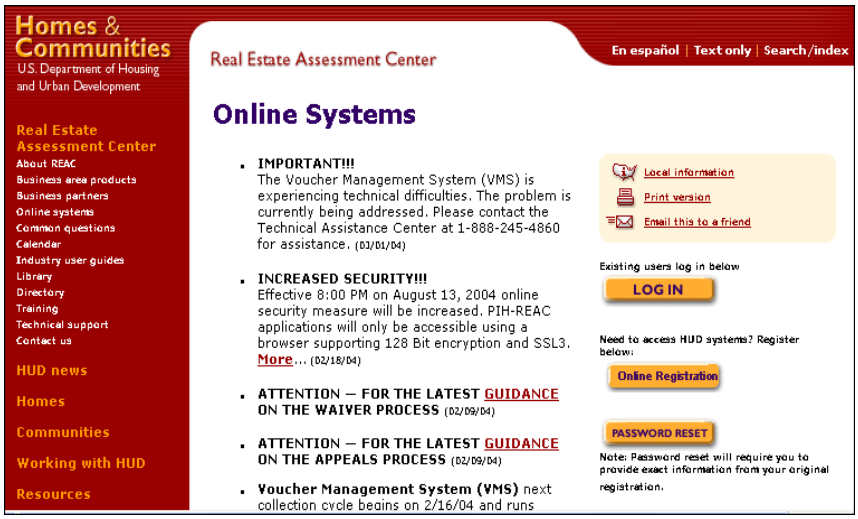


Figure 18-2. Online Systems page

3. Click on Online Registration (Online Registration). The **Need a User ID? page** displays.

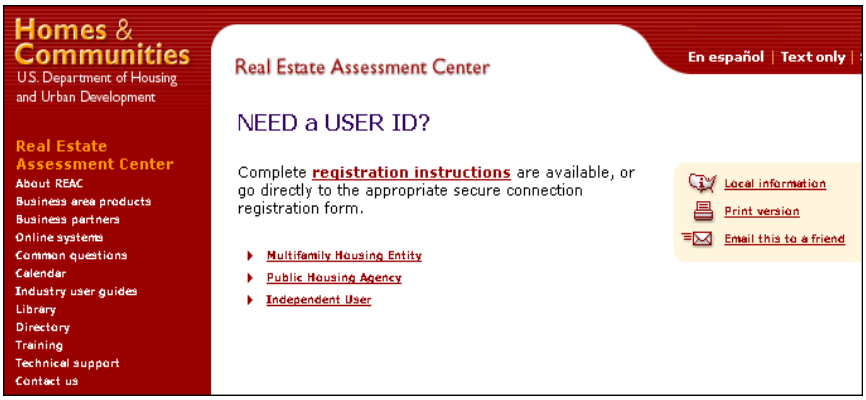
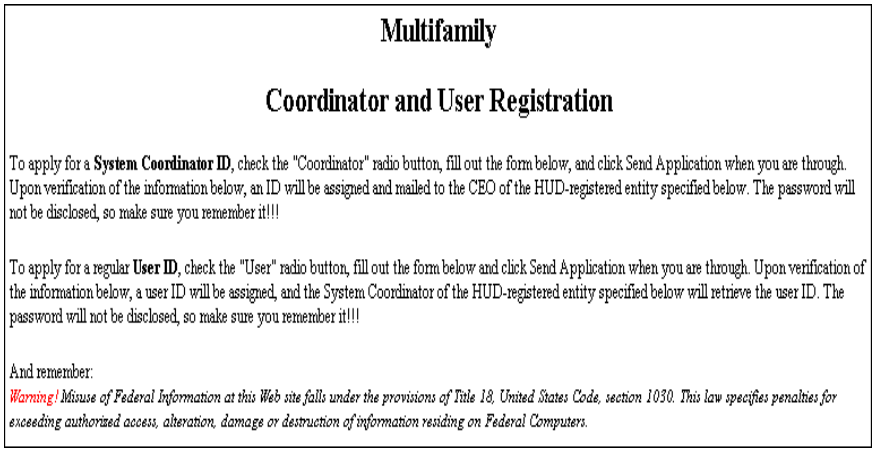


Figure 18-3. Need a User ID? page

4. Click on the Multifamily Housing Entity link. The **Multifamily - Coordinator and User Registration** form displays.



Multifamily

Coordinator and User Registration

To apply for a **System Coordinator ID**, check the "Coordinator" radio button, fill out the form below, and click Send Application when you are through. Upon verification of the information below, an ID will be assigned and mailed to the CEO of the HUD-registered entity specified below. The password will not be disclosed, so make sure you remember it!!!

To apply for a regular **User ID**, check the "User" radio button, fill out the form below and click Send Application when you are through. Upon verification of the information below, a user ID will be assigned, and the System Coordinator of the HUD-registered entity specified below will retrieve the user ID. The password will not be disclosed, so make sure you remember it!!!

And remember:
Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage or destruction of information residing on Federal Computers.

Figure 18-4. Registration Form

18.2.1 Coordinator Registration

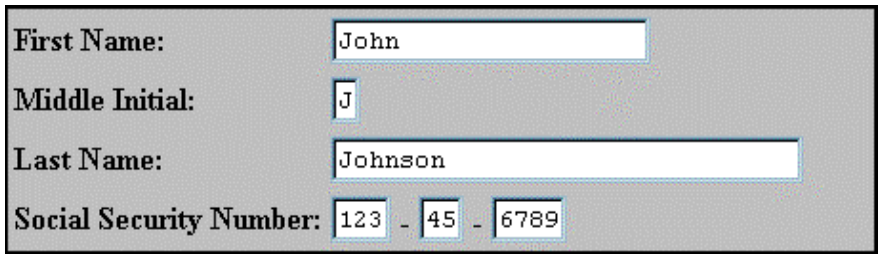
The Coordinator serves as the PBCAs Executive Director's representative in controlling access to the system and performing other system administration functions.

To register as a Coordinator:

1. On the **Multifamily Coordinator and User Registration** page, in the *Application Type* field, click on the *Coordinator* radio button.

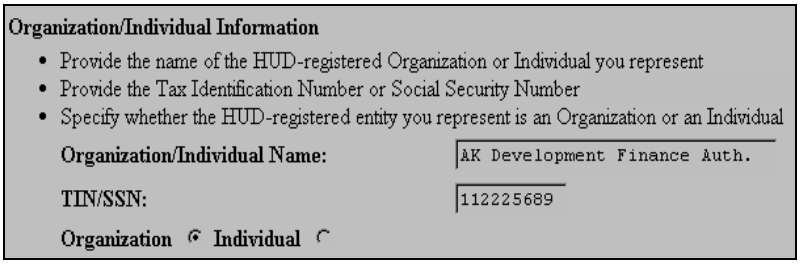


2. Enter the following Coordinator information:
   - *First Name*
   - *Middle Initial,* (optional)
   - *Last Name*
   - *Social Security Number*



✍ *Note: You can use the Tab key to move from one field to the next.*

3. Enter the following PBCA information:
   - *Organization/Individual Name* (PBCA's name)
   - *TIN/SSN* (for PBCA)
   - *Organization or Individual* (select a radio button)



4. . Type your email address.



5. Enter your password.



✍ *Note: Your password must be six characters, and can consist of letters and/or numbers.*

✍ *Note: **Important:** Your password is recorded EXACTLY as you type it, so remember how you enter any letters—uppercase or lowercase. Also, this password will be used each time you access HUD's secure system.*

6. Enter your Mother's Maiden Name.



✍ *Note: This information is used for future verification (e.g., if you forget your password).*

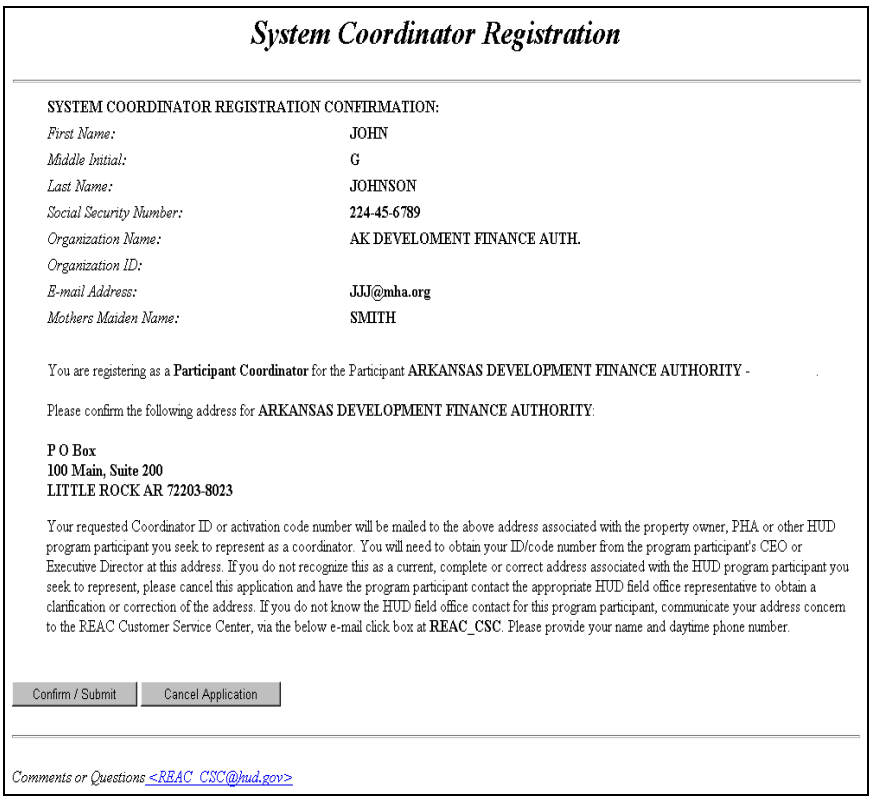
7. Check to ensure that the information in each field is correct.
8. Click on the Send Application button. A confirmation page displays.

Alternative Option

To correct a single entry, double-click in the field and enter the correct information.

OR

To clear all the fields, click on Clear Fields, and re-enter all of the information



System Coordinator Registration

SYSTEM COORDINATOR REGISTRATION CONFIRMATION:

First Name:	JOHN
Middle Initial:	G
Last Name:	JOHNSON
Social Security Number:	224-45-6789
Organization Name:	AK DEVELOMENT FINANCE AUTH.
Organization ID:	
E-mail Address:	JJJ@mha.org
Mothers Maiden Name:	SMITH

You are registering as a **Participant Coordinator** for the Participant ARKANSAS DEVELOPMENT FINANCE AUTHORITY -

Please confirm the following address for ARKANSAS DEVELOPMENT FINANCE AUTHORITY:

P O Box
100 Main, Suite 200
LITTLE ROCK AR 72203-8023

Your requested Coordinator ID or activation code number will be mailed to the above address associated with the property owner, PHA or other HUD program participant you seek to represent as a coordinator. You will need to obtain your ID/code number from the program participant's CEO or Executive Director at this address. If you do not recognize this as a current, complete or correct address associated with the HUD program participant you seek to represent, please cancel this application and have the program participant contact the appropriate HUD field office representative to obtain a clarification or correction of the address. If you do not know the HUD field office contact for this program participant, communicate your address concern to the REAC Customer Service Center, via the below e-mail click box at **REAC_CSC**. Please provide your name and daytime phone number.

Confirm / Submit | Cancel Application

Comments or Questions <REAC_CSC@hud.gov>

Figure 18-5. Coordinator Registration Confirmation

✍ *Note: Review all of the information for accuracy, especially the application type, business partner information, and mailing address.*

✍ *Note: The mailing address appears only for Coordinators (not Users).* ***Do not proceed with the application if this mailing address is inaccurate or you will not receive your user ID.*** *If the PBCA's mailing address is incorrect, contact your local HUD field offices to have the information corrected.*

9. If the information is accurate, click on Confirm / Submit to submit the application. A page displays acknowledging acceptance of the registration application for further processing.

   OR

   Click on Cancel Application, to return to the registration form.



Figure 18-6. Registration Accepted for Further Processing

✍ *Note: It is suggested that you print this page for future reference.*

To receive your Coordinator ID:

Coordinator registration applications are processed nightly. The PBCA's information is verified and a user ID is generated. An email notification is sent to the Coordinator to confirm your successful registration.

HUD also sends a letter containing the user ID directly to the PBCA's Executive Director (to the address that was given on the registration page). This notification is generally sent out the next business day following registration. The PBCA's Executive Director should receive the letter from HUD within 2 weeks. The Executive Director approves the Coordinator as their representative by providing the Coordinator with their user ID. The letter does not contain your password. You must remember the password you entered on the registration form.

To register as a coordinator when you already have an MID:

If you already have an M ID and have been assigned as the new coordinator, you must call the Help Desk on 888-245-4860. The Help Desk will make the necessary changes to your ID and send you confirmation when your coordinator status has been assigned. You should not go through the new application process as this will generate a new MID.

18.2.2 User Registration

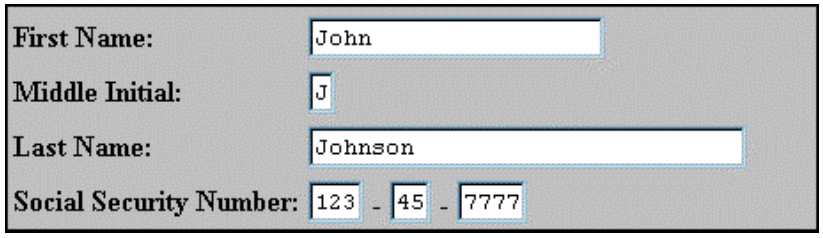
A User can be an employee of the PBCA or a third party authorized by the PBCA to submit data for the PBCA.

To register as a User:

1. On the **Multifamily Coordinator and User Registration** page, in the *Application Type* field, click on the *User* radio button.



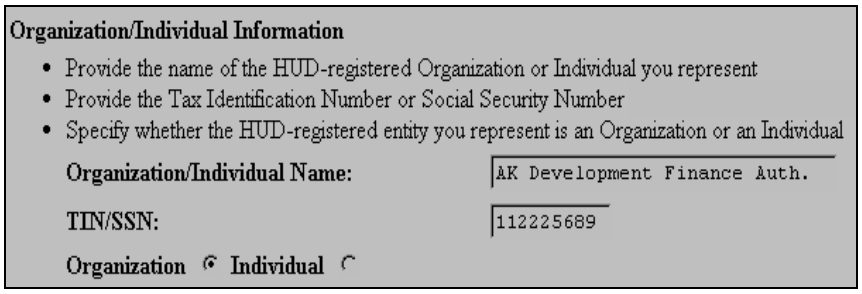
2. Enter the following User information:
   - *First Name*
   - *Middle Initial* (optional)
   - *Last Name*
   - *Social Security Number*



✍ *Note: You can use the Tab key to move to the next field.*

3. Enter the following PBCA information:
   - *Organization/Individual Name* (PBCA's name)

- *TIN/SSN* (for PBCA)
- *Organization or Individual* (select a radio button)



> ✍ *Note: This must be the TIN for the PBCA of the associated Coordinator.*
>
> ✍ *Note: You must provide this information to receive your user ID.*

4. Type your email address in the *E-mail Address field*.



> ✍ *Note: It is important to provide your email address so that HUD can communicate with you.*

5. Enter your password. Your password must be six characters, and can consist of letters and/or numbers.



> ✍ *Note: Your password must be six characters, and can consist of letters and/or numbers.*
>
> ✍ *Note: **Important:** Your password is recorded EXACTLY as you type it, so remember how you enter any letters—uppercase or lowercase. Also, this password will be used each time you access HUD's secure system.*

6. Enter your Mother's Maiden Name. This information is used for future verification (e.g., if you forget your password).



7. Check to ensure that the information in each field is correct.

> ✍ *Note: Review all the information for accuracy, especially the application type and PBCA information.*

8. Click on Send Application to submit the application information. A confirmation page displays.

Alternative Option

To correct a single entry, double-click in the field and enter the correct information.

OR

To clear all the fields, click on Clear Fields, and re-enter all the information.



Standard User Registration

STANDARD USER REGISTRATION CONFIRMATION:

First Name:	JOHN
Middle Initial:	G
Last Name:	JOHNSON
Social Security Number:	224-45-6789
Organization Name:	AK DEVELOMENT FINANCE AUTH.
Organization ID:	
E-mail Address:	JJJ@mha.org
Mothers Maiden Name:	SMITH

You are registering as a **Participant User** for the Participant **ARKANSAS DEVELOPMENT FINANCE AUTHORITY** -

Please confirm that you are registering as a **Participant User** and not as a Coordinator. After your registration is processed, the coordinator for **ARKANSAS DEVELOPMENT FINANCE AUTHORITY** will disclose your ID to you.

Confirm / Submit Cancel Application

Comments or Questions <RBAC_CSC@hud.gov>

Figure 18-7. Standard User Registration Confirmation

9. If the information is accurate, click on Confirm / Submit to submit the application.

A page displays acknowledging acceptance of the registration application for further processing.

OR

Click on Cancel Application, to return to the registration form.

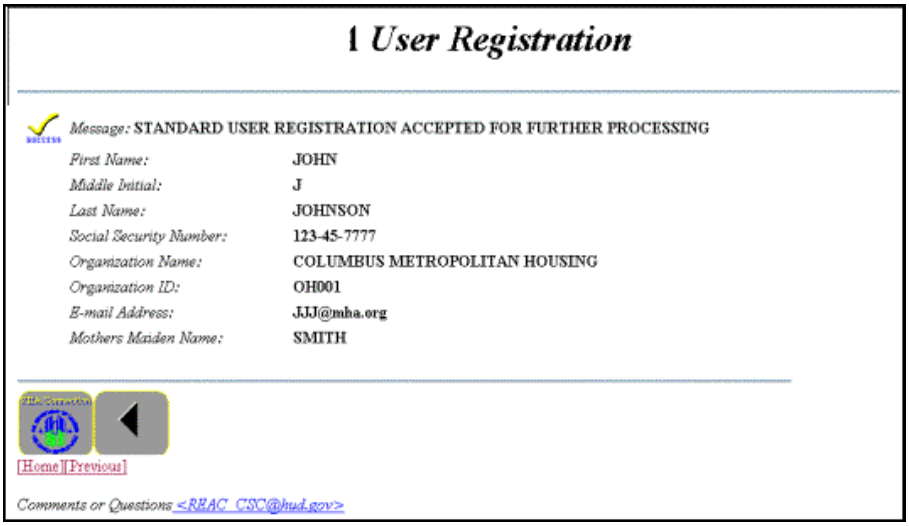


Figure 18-8. User Registration Accepted for Further Processing

> ✍ *Note: It is suggested that you print this page for future reference.*

To receive your User ID

User registration applications are processed nightly. The PBCA's information is verified and a user ID is generated.

To obtain their ID, the User must notify the Coordinator that they have registered for a user ID. Allow at least 24 hours after registering for your User ID to be posted. The Coordinator can retrieve the user's ID from the system and provide this information to the User. A User can access the system after they receive their user ID from the Coordinator and after the Coordinator assign them system rights and roles.

18.3 Secure Connection

To make a secure connection to HUD's secure systems, you must log in with your user ID and password. Because the password is case-sensitive, it must be entered exactly as you requested it on the online registration application. For example, a password entered in lowercase letters during registration must always be entered in lowercase letters upon login to successfully log in to secure systems.

18.3.1 Making a Secure Connection

You can log into secure systems from the **Online Systems** page. You can also bookmark the **Online Systems** page for quick access to log in.

To access the Secure Systems

1. Enter the following URL in the *Location* field: **https://hudapps.hud.gov/HUD_Systems/.** The Connect to hudapps.hud.gov box displays.



Figure 18-9. Connect to Hudapps box

> ✍ *Note: Bookmark this site for quick future access.*

2. Enter your *User ID* in the *User Name* field.
3. Enter the *Password* where indicated.

> ✍ *Note: The User ID will be your **M-**ID. The User ID must be entered all in uppercase format. Remember your password is case-sensitive.*

4. Click OK, and the **Legal Warning** page displays.

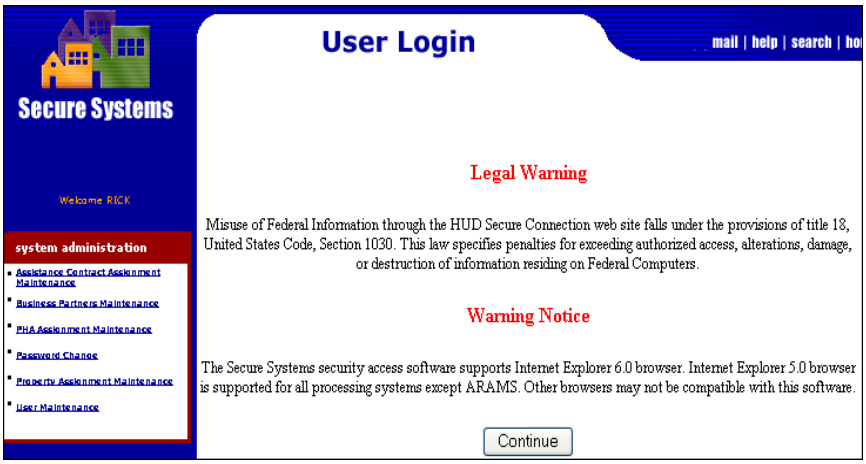


Figure 18-10. Legal Warning page

5. Click Continue, and the **Secure Systems – Main Menu** page displays.

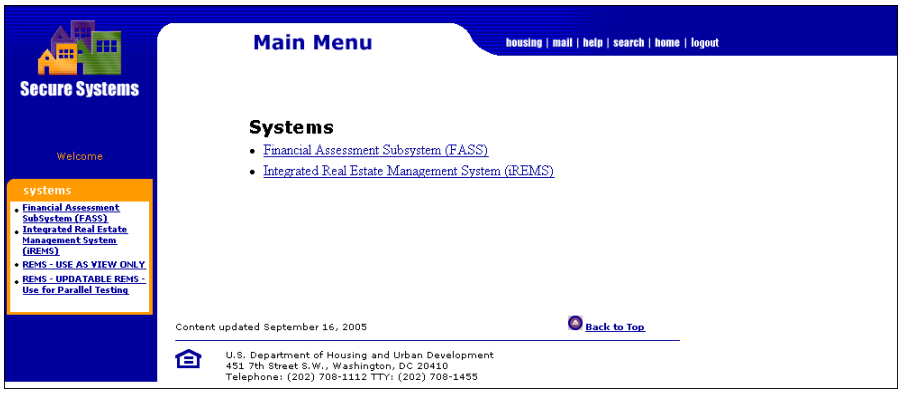


Figure 18-11. Secure Systems Main Menu

> ✍ *Note: For most users, the only link that will appear under "System Administration" is Password Change. The other links appear only for Coordinators.*
>
> ✍ *Note: A system link does not indicate that you have access to that system. Your Coordinator must assign you rights to **iREMS** before you will be allowed access.*

6. Click on the Real Estate Management System (**iREMS**) link and the **iREMS** home page displays.

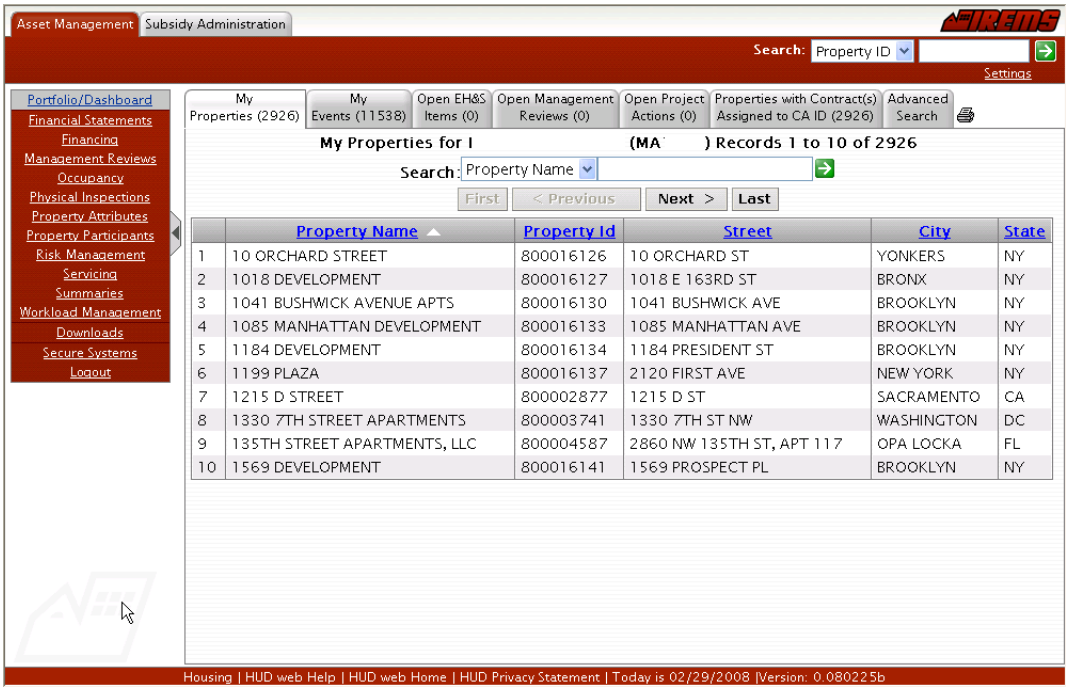


Figure 18-12. PBCA iREMS home page

To exit the Secure Systems web page

You can exit and return to the **Secure Systems** page at any time. Because it is a secure system containing sensitive information, you should always exit the system when leaving the computer to ensure that data security is maintained.

1. Save any changes on a page using the appropriate buttons.
2. Click on the Close ☒ control icon in the top right corner of the page. The application closes

and the desktop displays.

Alternative Option

Click on the *Logout* sidebar option.

18.3.2 Your Password

Unlike user IDs, User passwords are not accessible to Coordinators. User passwords expire every 21-calendar days. The system automatically prompts you to change your password. You must remember how you saved your new password (i.e., uppercase or lowercase).

If you need to **reset** your password you must go to the REAC **Online Systems** page. If the system does not allow you to reset your password, the Secure Systems Helpdesk will assist you with this process. This will involve security verification of the user's SSN and mother's maiden name.

For password assistance call the Secure Systems Helpdesk 1-888-245-4860.

- The best contact time is: 7am-9 am or 6pm-8:30pm EST
- The hours of operation are: 7am to 8:30pm EST

To change your password

On the Secure Systems – Main Menu page, under System Administration, the Password Change option allows Users and Coordinators to change their own passwords.

1. From the **Secure Systems- Main Menu** page, click on the Password Change link. The **Change User Password** page displays:



Figure 18-13. Change User Password

2. Enter the following:
   - *Old Password*
   - *New Password*
   - *Verify New Password* (retype New Password exactly as entered)

3. Click on Save. The old password is changed to the new password and the **Secure Systems-Main Menu** page displays.

> ✍ *NOTE: The password change is not instantaneous; it may take up to 15 to 30 minutes to take effect. Your old password is valid until the new password takes effect.*

To reset your password

If the system does not allow you to **reset** your password, after following these instructions, the Secure Systems Helpdesk will assist you with this process.

1. Enter the following URL address: ***www.hud.gov/reac*** in the *Location* field from your Internet browser (e.g., Microsoft Internet Explorer). The **REAC** home page displays.
2. On the left side of the page, click on the Online systems link. The REAC **Online Systems** page displays.
3. Click on PASSWORD RESET, and the **Reset Password** page displays.

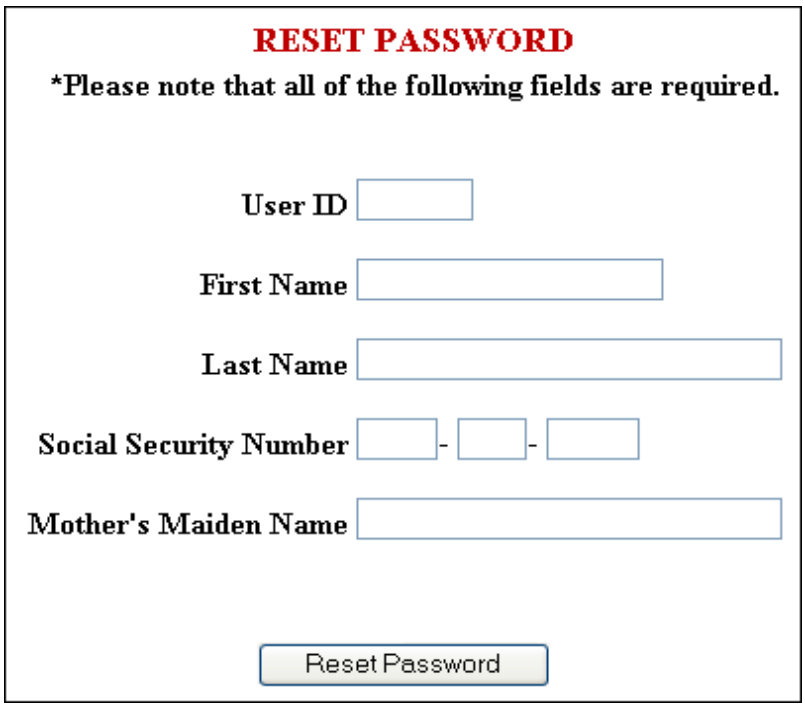


Figure 18-14. Reset Password page

4. Enter the following:
   - *User ID*
   - *First Name*
   - *Last Name*
   - *Social Security Number (tab between fields)*
   - *Mother's Maiden Name*

✍ *Note: Password Reset will require you to provide the exact information as entered on the original registration form.*

4. Click on Reset Password.

18.4 System Administration for Coordinators

As the Coordinator, you perform system administration functions to provide the PBCA User with access to the system and to assign the User rights to the participant's data. First, you must establish yourself as a Coordinator in the system. Once established as a Coordinator, you can then retrieve IDs, for registered Users, of the entity you represent. A Coordinator can also serve as a User for the PBCA. Therefore, the Coordinator must also be assigned to a specific contract, with the proper role, to enter or edit property data.



Figure 18-15. Secure Systems Main Menu

The **Secure Systems – Main Menu** page contains two sections: Systems and System Administration. The *Systems* section provides links to HUD's secure systems. The list of system links varies based on your rights to the system. Even though the link exists, you must be assigned the proper rights to access the system.

Primarily, the *Systems Administration* section allows Coordinators to control system access and update User information.

18.4.1 Establishing yourself as a coordinator in iREMS

After registering yourself as a Coordinator, you will receive your user ID from the PBCA Executive Director. Your user ID, along with the password you submitted on your registration application, allows you to log in and set up system rights. In order for the Coordinator to assign roles to other users, the Coordinator must first assign actions and roles to themselves.

After you log in and access the **Secure Systems-Main Menu** page, you must establish yourself as a Coordinator in the system in order to perform administrative functions.

To set up Coordinator Actions in iREMS:

1. On the **Secure Systems-Main Menu** page, click on the User Maintenance link. The **User Maintenance** page displays.

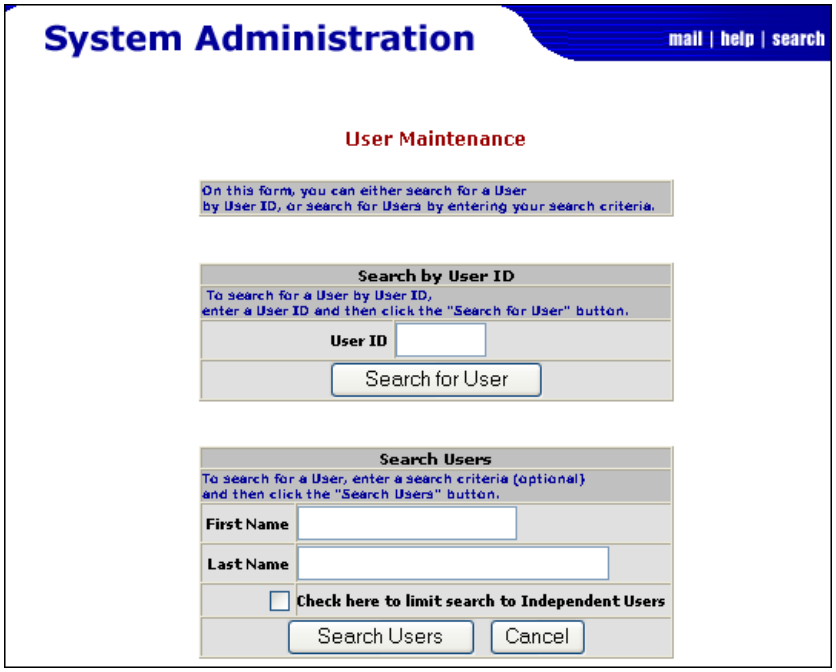


Figure 18-16. User Maintenance page

2. Enter your user ID in the *User ID* field.
3. Click on Search for User, and the **Maintain User** page displays.

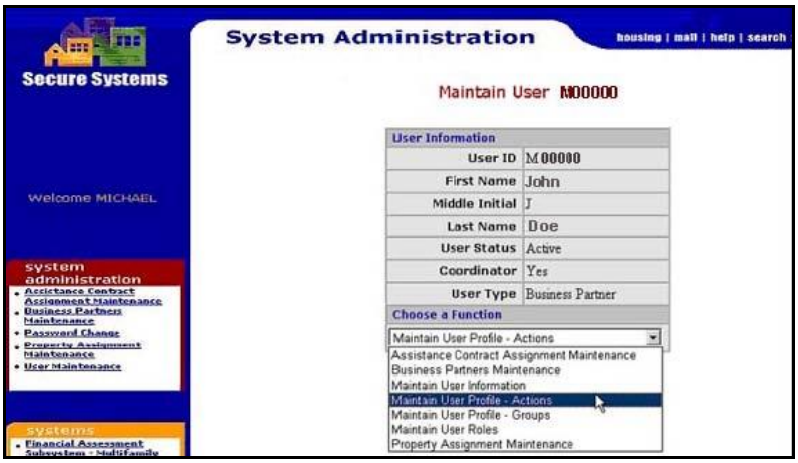


Figure 18-17. Maintain User page

4. Select *Maintain User Profile – Actions* from the Choose a Function drop-down list.
5. Click on Submit, and the **Assign/Unassign Actions for User** page displays.

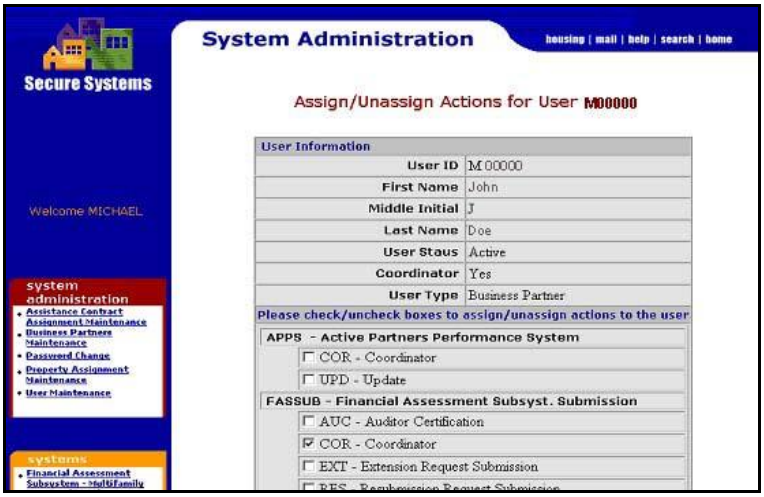


Figure 18-18. Assign/Unassign Actions for User (1of 2)

✍ *NOTE: Only Coordinators have access to this page.*

✍ *NOTE: This page will display several systems in addition to **iREMS**. Your ID only allows you rights to limited systems.*

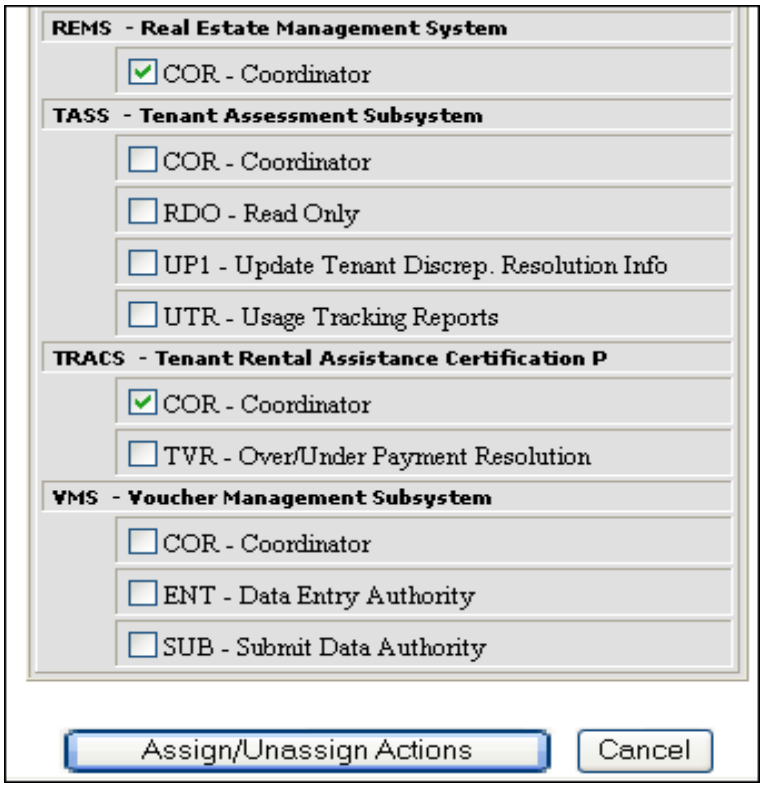


Figure 18-19. Assign/Unassign Actions for User (2of 2)

6. Click in the checkbox to the left of "COR - Coordinator" under the **iREMS** section.
7. Click on Assign/Unassign Actions, and the "**Successful Transaction**" dialog box displays.



Figure 18-20. Successful Transaction box

8. Click on OK, to return to the **Maintain User** page.

To remove the Coordinator Action in iREMS:

On the **Secure Systems-Main Menu** page, click on the User Maintenance link. The **User Maintenance** page displays.

1. Enter the Coordinator's ID in the *User ID* field.
2. Click on Search for User, and the **Maintain User** page displays.
3. Select *Maintain User Profile – Actions* from the Choose a Function drop-down list.
4. Click on Submit, and the **Assign/Unassign Actions for User** page displays.

> ✍ *NOTE: Only Coordinators have access to this page.*
>
> ✍ *NOTE: This page will display several systems in addition to **iREMS**. Your ID only allows you rights to select systems.*

5. Click in the box to the left of "COR - Coordinator" under the **iREMS** section, to remove existing check mark.
6. Click on Assign/Unassign Actions, and the "**Successful Transaction**" dialog box displays.
7. Click on OK, to complete the process and return to the **Maintain User** page.

To set up Coordinator Roles in iREMS:

1. On the Secure Systems-Main Menu page, click on the User Maintenance link. The **User Maintenance** page displays.
2. Enter the Coordinator's ID in the *User ID* field.
3. Click on Search for User, and the **Maintain User** page displays.
4. Select *Maintain User Roles* from the Choose a Function drop-down list.
5. Click on Submit, and the **Assign/Unassign Roles for User** page displays.



Figure 18-21. Assign/Unassign Roles for User (1of 2)

> ✍ *Note: This page will display several systems in addition to **iREMS**. Your ID only allows you rights to select systems.*

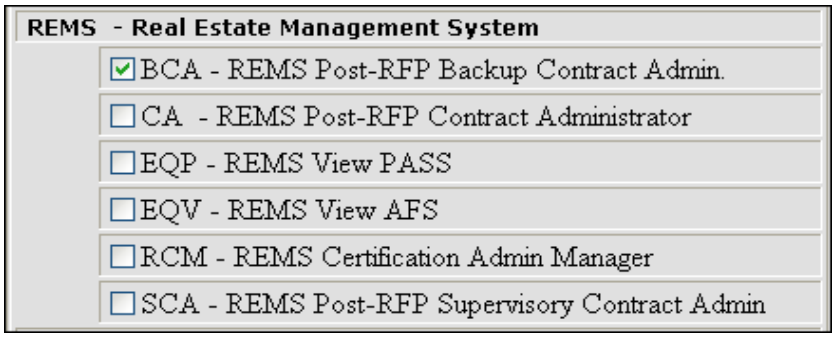


Figure 18-22. Assign/Unassign Roles for User (2of 2)

6. Click in the box to the left of the appropriate Coordinator role *(BCA, CA, or SCA)* under the **iREMS** section.

> ✍ *Note: Although other roles appear in the table, the only roles available for PBCA users are: Contract Administrator (CA); Backup Contract Administrator (BCA); and Supervisory Contract Administrator (SCA). All roles have the same level of accessibility.*

7. Click on Assign/Unassign Roles, and the **Assign/Unassign Role Confirmation** page displays.

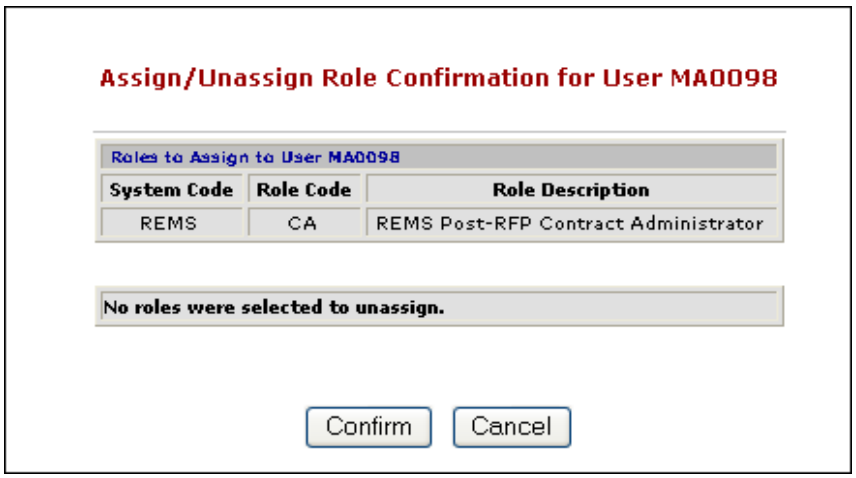


Figure 18-23. Assign/Unassign Role Confirmation for User page

8. Click on Confirm to accept changes, and the "**Successful Transaction**" dialog box displays.
9. Click on OK, to complete the process and return to the **Maintain User** page.

18.5 Providing a User with System Access

As the PBCA's Coordinator, you are responsible for controlling access to the system and the PBCA data. You should verify that a User is authorized to do business for the PBCA prior to allowing the User access to the system on their behalf.

The Coordinator must then assign a User a system role and rights to the PBCA's data.

18.5.1 Retrieving the User ID

After a User has registered with HUD and notified you (the Coordinator) of their registration, you must retrieve the user ID from the system. Registration applications are processed nightly, so allow at least 24 hours after a User has registered before attempting to retrieve their ID.

To retrieve a user ID for a User:

1. On the **Secure Systems-Main Menu** page, click on the User Maintenance link. The **User Maintenance** page displays.

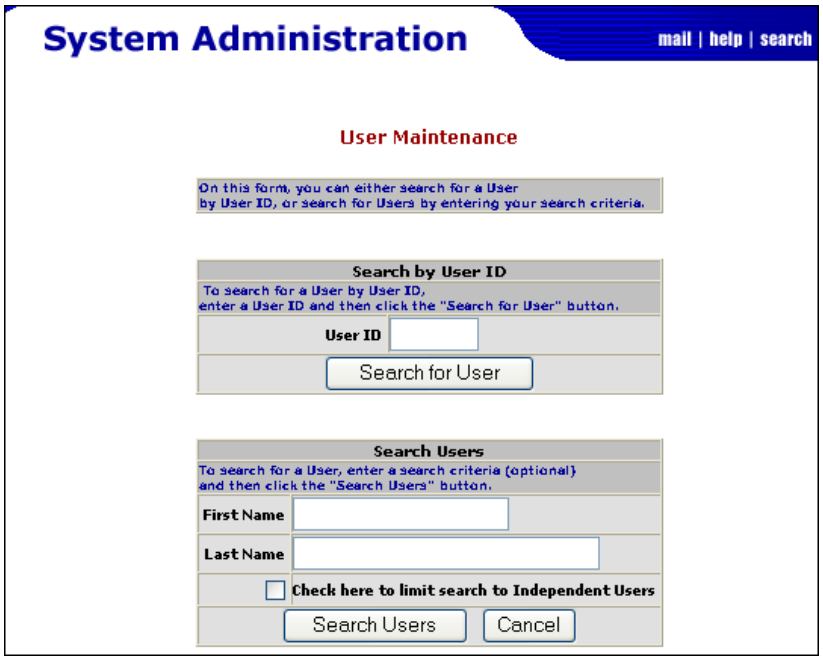


Figure 18-24. User Maintenance page

2. Enter the User's *First and Last Name* in the appropriate field (for an individual search).

   OR

   Leave *First and Last Name* fields blank for a comprehensive (group search) of all users.

3. Click on Search Users, and the **User List** page displays the *user ID* and other relative information.

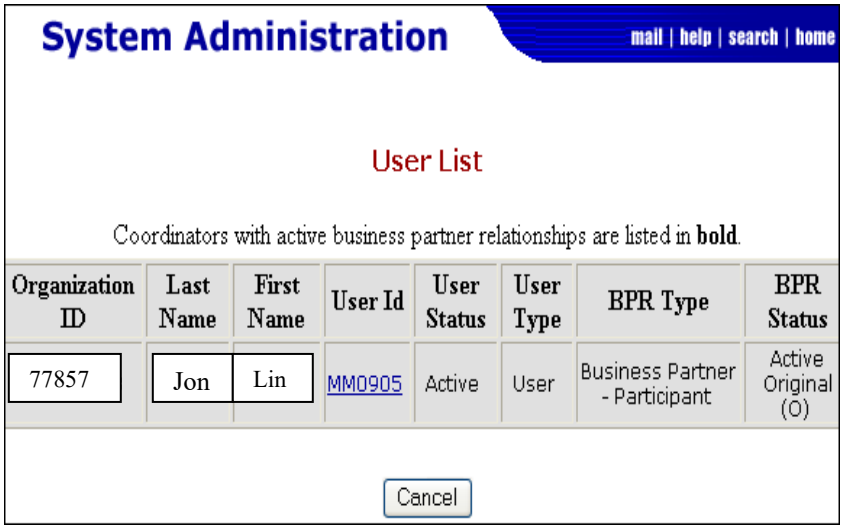


Figure 18-25. User List page

4. Click on the User ID link and the **Maintain User** page displays.

18.5.2 User Roles

After retrieving the User's ID, the Coordinator must assign a role that allows the user update rights.

To assign a system role to a User:

1. On the **Secure Systems-Main Menu** page, click on the User Maintenance link. The **User Maintenance** page displays.
2. Enter the User's ID in the *User ID* field.
3. Click on Search for User, and the **Maintain User** page displays.
4. Select *Maintain User Roles* from the Choose a Function drop-down list.
5. Click on Submit, and the **Assign/Unassign Roles for User** page displays.

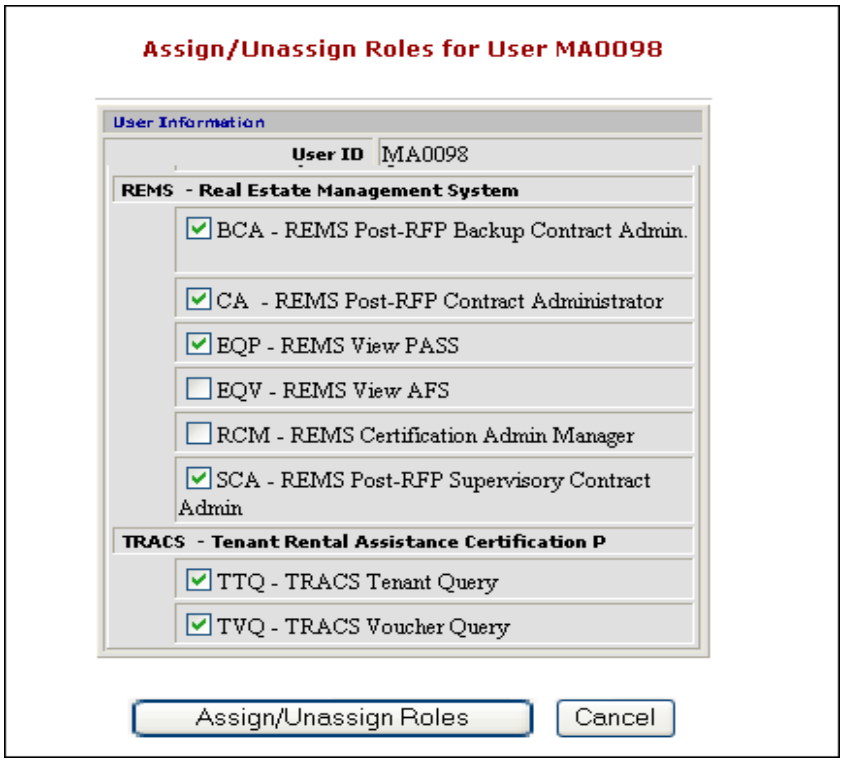


Figure 18-25. iREMS roles

✍ *Note: The Coordinator only sees the roles for the system(s) he or she identified in the Maintain User Profile – Actions function. For example, if you serve as Coordinator for **iREMS**, the **iREMS** roles will display for assignment purposes.*

6. Click in the box to the left of desired role under the **iREMS** section.

✍ *Note: There are 3 roles available in **iREMS** that allow Users to input data on assigned contracts: **CA - iREMS** Post-RFP Contract Administrator; **SCA - iREMS** Post-RFP Supervisory Contract Admin; and **BCA - iREMS** Post-RFP Backup Contract Admin*

7. Click Assign/Unassign Roles, and the **Assign/Unassign Role Confirmation** page displays.

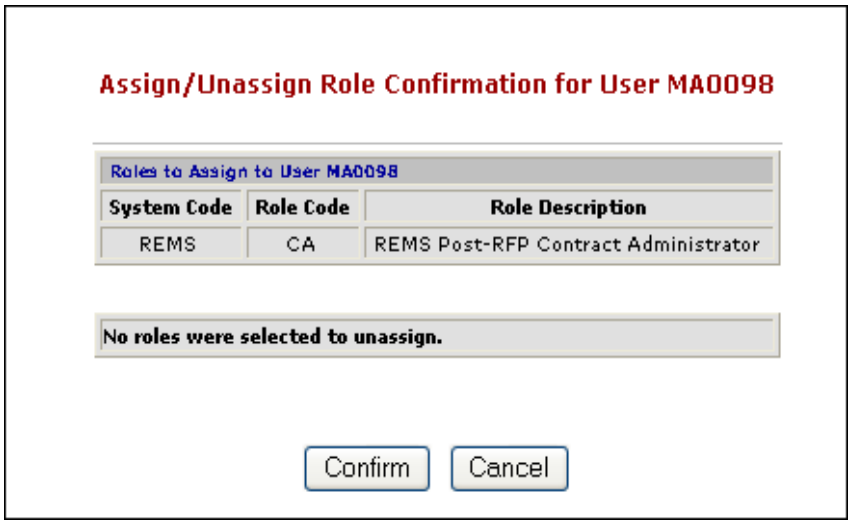


Figure 18-26. Assign/Unassign Role Confirmation for User page

8. Click on Confirm to accept changes, and the "**Successful Transaction**" dialog box displays.



Figure 18-27. Successful Transaction box

9. Click on OK, to complete the process and return to the **Maintain User** page.

To unassign a system role for a User:

1. On the **Secure Systems-Main Menu** page, click on the User Maintenance link. The **User Maintenance** page displays.
2. Enter the User's ID in the *User ID* field.
3. Click on Search for User, and the **Maintain User** page displays.
4. Select *Maintain User Roles* from the Choose a Function drop-down list.
5. Click on Submit, and the **Assign/Unassign Roles for User** page displays.
6. Click in the checkbox to the left of the role you want to unassign under the **iREMS** section.
7. Click on Assign/Unassign Roles, and the Assign/Unassign Role Confirmation for User page displays.

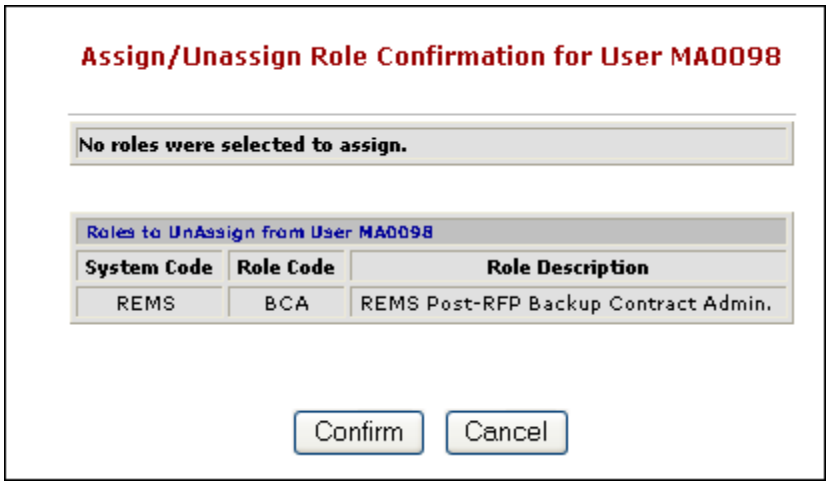


Figure 18-28. Assign/Unassign Role Confirmation for User page

8. Click on Confirm, to accept changes, and the "**Successful Transaction**" dialog box displays.
9. Click on OK, and you will be returned to the **Maintain User** page.

18.5.3 Contract Assignment

The Coordinator uses the Assistant Contract Assignment Maintenance function to establish User rights to specific contracts. The Coordinator will only have access the contracts that are assigned to the Business Partner he or she represents.

To assign Contract rights to a User:

1. On the **Secure Systems-Main Menu** page, click on the *Assistant Contract Assignment*

Maintenance link. The **Assistant Contract Assignment Maintenance** page displays.

2. Enter the *User ID* in the User ID field.

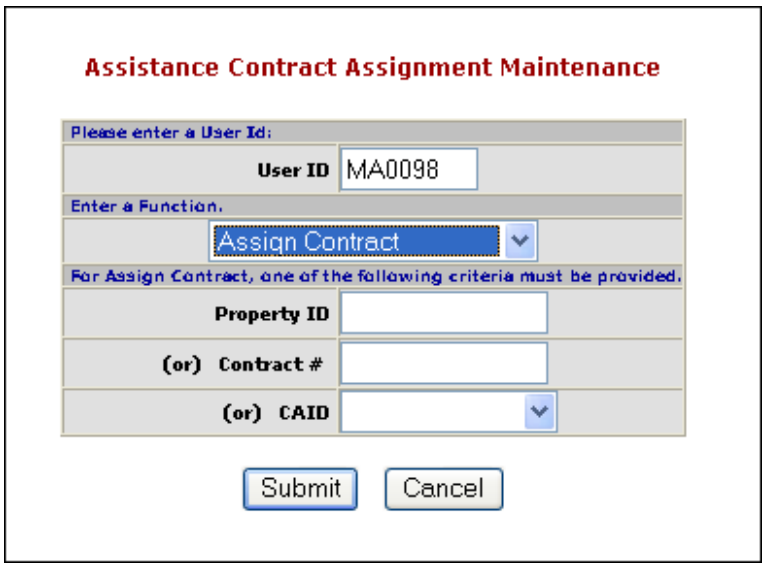


Figure 18-29. Assistance Contract Assignment Maintenance page

3. Select *Assign Contract* from the Enter a Function drop-down list.
4. Select the appropriate *Contract Administrator ID* from the CAID drop-down list.

> ✍ *Note: Searching by the Property ID or the Contract # will yield on the one property. A search using the CAID will provide a list of all contract assigned to your PBCA and allow you to perform multiple assignments for one user.*

5. Click on Submit, and the **Assign Contract** page displays.

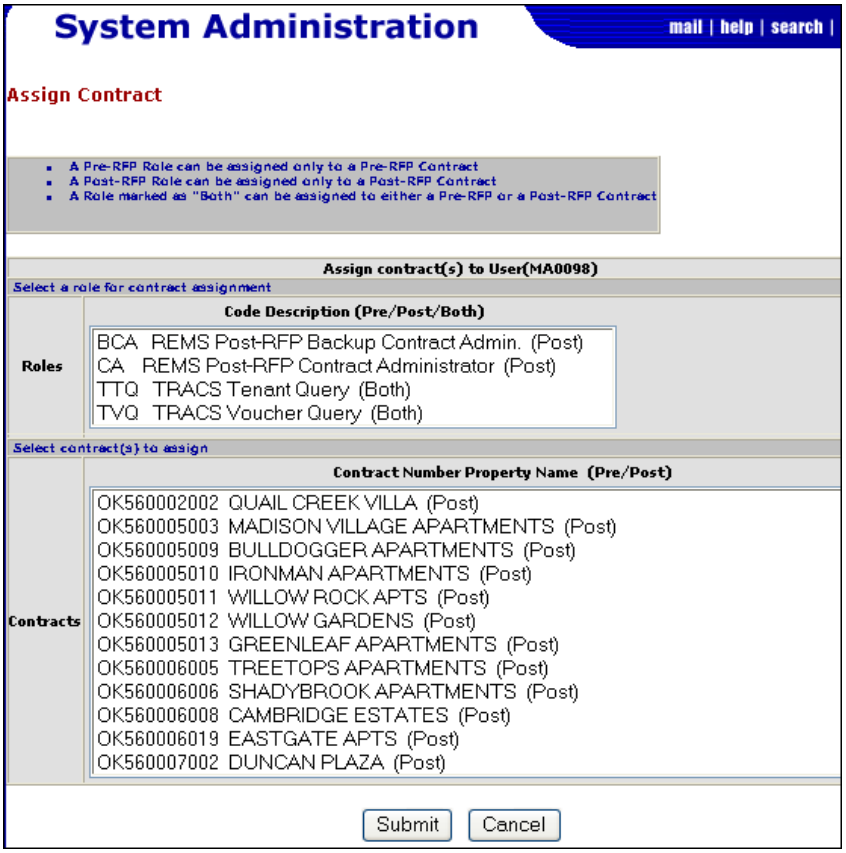


Figure 18-30. Assign Contract page

> ✍ *Note: The page displays all the Roles assigned to the user and the contracts requested by your selection criteria. (Only contracts assigned to your PBCA or Business Partner will display).*

6. Highlight the desired role or roles from the Roles selection box.
7. Highlight the desired contract or contracts from the Contracts selection box.

> ✍ *Note: To select multiple contracts, hold down the Ctrl key when making each selection. To select a consecutive group of contracts, highlight the first contract then place your cursor on the last contract, then hold down the SHIFT key to highlight the row.*

8. Click on Submit, and the **Assign Assistance Contract Confirmation** page displays.



Figure 18-31. Assign Assistance Contract Confirmation page

9. Click on Confirm to accept changes, and the "**Successful Transaction**" dialog box displays.

18.6 Business Partner Relationships

The first Coordinator relationship with a Business Partner (PBCA for **iREMS**) is an "original" relationship and is established during the initial coordinator registration process. Coordinators may request relationships with multiple Business Partners (BPR). The Coordinator must establish this BPR in secure systems via the Business Partner Maintenance modules.

To request/establish additional Business Partner Relationships:

1. On the **Secure Systems-Main Menu** page, click on Business Partners Maintenance link. The **Business Partners Maintenance** page displays.

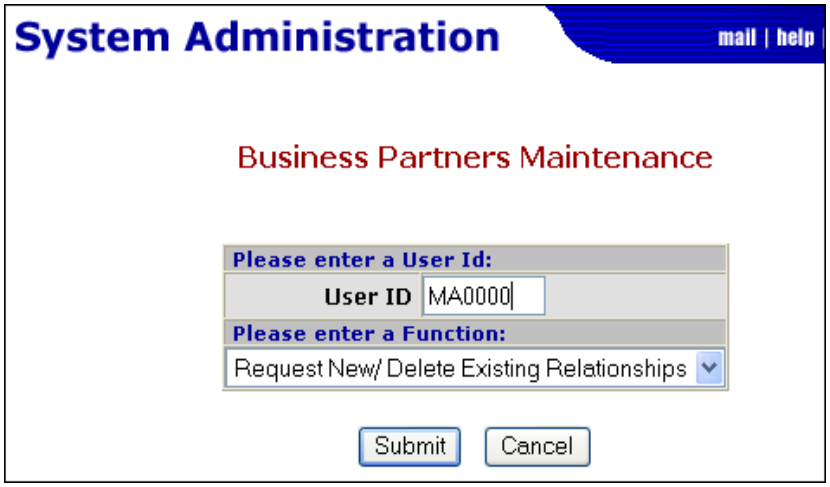


Figure 18-32. Business Partners Maintenance

2. Enter the *User ID* in the User ID field.
3. Select *Request New/Delete Exiting Relationships* from the Enter a Function drop-down list.
4. Click on Submit, and the **Add/Delete Relationships** page displays.



Figure 18-33. Add/Delete Relationships page

5. In the "Relationships to add" section, enter the *Business Partner's TIN/SSN* and select the *Business Partner type* from the drop-down list.

6. Click on Submit, and the **Add/Delete Relationships Confirmation** page displays.

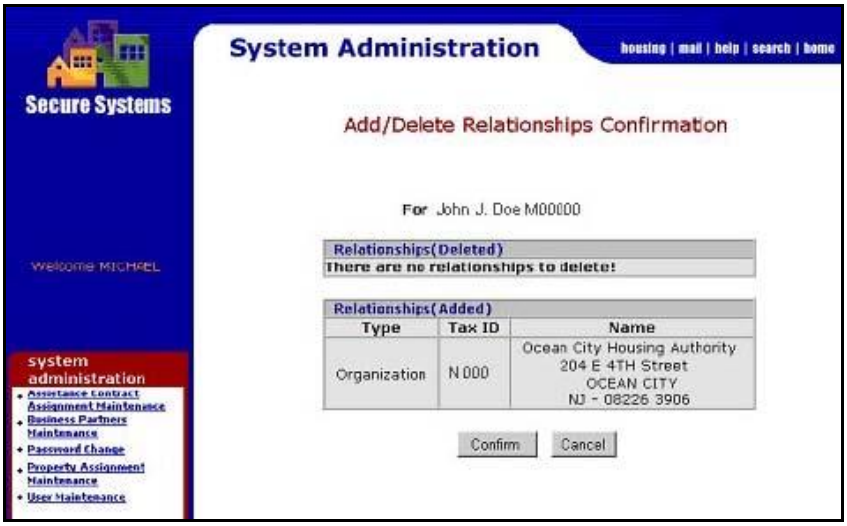


Figure 18-34. Add/Delete Relationships Confirmation page

> ✍ *Note: Make sure to verify the accuracy of the Business Partner's mailing address. The Activation Key (which will be needed to complete this process) will be mailed to the address shown.*

7. Click on Confirm, to accept the information, and the "**Successful Transaction**" dialog box displays.

To activate the Business Partner relationship:

The Coordinator's request for a new BP relationship will trigger a letter to be sent to the Business Partner with an Activation Key to confirm the relationship. Once the Coordinator has received the Activation Key from the Business Partner, he/she must activate the relationship in Secure Systems.

1. On the **Secure Systems-Main Menu** page, click on Business Partners Maintenance link. The **Business Partners Maintenance** page displays.



Figure 18-35. Business Partners Maintenance page

2. Select *Activate Relationships* from the Enter a Function drop-down list.
3. Click on Submit, and the **Activate Relationships** page displays.



Figure 18-36. Activate Relationships page

4. Enter the corresponding *Activation Key* in the space provided.

> ✍ *Note: The Coordinator must obtain the Activation Key from the Business Partner.*

5. Click on Submit, and the "**Successful Transaction**" dialog box displays.