Capital Needs Assessment Electronic Tool (CNA e-Tool)
Quick Guide for Needs Assessors

Before you start: Are you a Needs Assessor?

- Needs Assessors are typically contracted by PHAs, Lenders, or Property Owners to conduct property assessments in CNA e-Tool.

STEP 1: Is your organization registered in APPS?

- Your organization must be registered in APPS by the organization's controlling manager (e.g., president, CEO) or a designee.
- An APPS account must be created using your **organization's TIN**. Please see Appendix B of the **User Access Guide**.

STEP 2: Register for your Multifamily Participant ID (M-ID)

- Each staff member of your organization must register on Secure Systems to receive their Multifamily Participant ID (M-ID).
- There are two types of registered users required for each organization:
  - "*User*"
  - "*Coordinator*" user with managerial privileges

  Note: Your organization must appoint at least one "Coordinator" before adding users.
- You must use your organization's TIN (used in Step 1) when registering. If you do not know the TIN, contact your management before applying for your M-ID.
- Your new M-ID will link you to the CNAs that belong to your organization.
- Please watch the following: **How to get your M-ID Video Tutorial.**

STEP 3: Coordinator provisions your M-ID

- Coordinators are responsible for granting themselves and other users access to CNA e-Tool through **Secure Systems User Maintenance Screen**.
- Users are only able to access to the CNA e-Tool after the Coordinator assigns User Roles to your M-ID in the **Participant Assignment Maintenance Screen**.
- Please watch the following: **Needs Assessor Coordinator Video Tutorial.**

Step 4: Add your organization to CNA e-Tool

- Now that you are set up to work, you must email the CNA e-Tool Team and request your organization be added to CNA e-Tool. After that, your clients will be able to select your organization in the CNA e-Tool.