Public Housing Portal

Public Housing Agency User Guide to
Assigning WASS Roles for the Public Housing Portal (For External Users Only)

U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

February 12, 2024

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Purpose of this Guide

This guide provides steps for the PHA's local Web Access Security Subsystem (WASS) security coordinator to provide PHA staff and third-party support with access to the Public Housing Portal (portal) and the Operating Fund (OpFund) MicroStrategy Reports. Refer the section Quick Guide for quick steps to provide the PHA WASS security coordinator assignment and PHA user role assignments. Find the portal through Secure Systems URL https://hudapps.hud.gov/HUD_Systems.

Role Assignment

Any new role assignments take two (2) business days to be effective. Once the link "**Public housing Portal (PIH Operating Fund)**" is made available in Secure System navigation menu, each user must create their user profile and validate their user profile in the portal. Refer to the User Profile User Guide.

PHA WASS Security Coordinator Role Assignment

The following are steps the PHA's WASS security coordinator takes to obtain coordinator role for the portal. The WASS coordinator needs to complete these steps only once. Please note that it takes two (2) business days for the role to be effective.
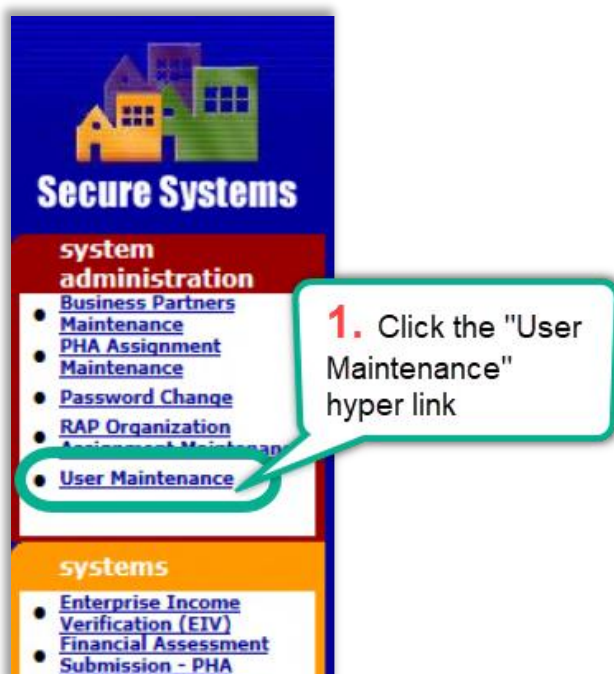
User Maintenance

On this form, you can either search for a User
by User ID, or search for Users by entering your search criteria.

Search by User ID

To search for a User by User ID,
enter a User ID and then click the "Search for User" button.

User ID	[　　　] *What's This?*
	(S)earch for User

2. Search by User ID

or

Search Users

To search for a User, enter a search criteria (optional)
and then click the "Search Users" button.

Business Partner - TIN/SSN/PHA ID/IPA ID	[　　　] *What's This?*
First Name	[　　　]
Last Name	[　　　]
User Status	All ▽ *What's This?*
	☐ Check here to limit search to Independent Users
	Search (U)sers Cancel

Search by User Name

Maintain User

User Information

User ID	
First Name	
Middle Initial	
Last Name	
User Status	Active
Coordinator	Yes
User Type	PHA User/Business Pa

Choose a Function

Business Partners Maintenance
Maintain User Information
Maintain User Profile - Actions
Maintain User Profile - Groups
Maintain User Profile - Roles
Resend Letter

3. Select "Maintain
User Profile- Actions"
& click Submit

Click on the [Assign/Unassign Actions] button at the bottom of the screen.

Assign/Unassign Role Confirmation for User

Roles to Assign to User MPG608		
System Code	**Role Code**	**Role Description**
OFPIH	COR	Coordinaor

No roles were selected to unassign.
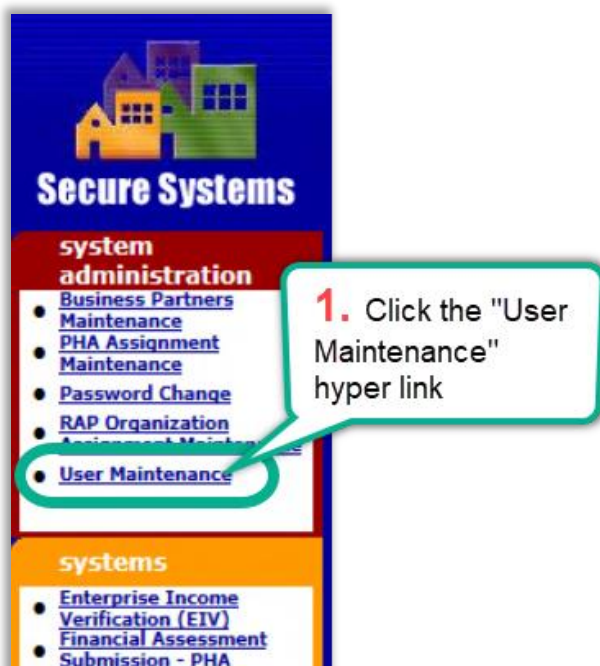
5. Click Confirm ——→ Confirm   Cancel

PHAs need to assign the WASS coordinator role only one time. This assignment allows the WASS coordinator to assign additional staff roles in the future. The WASS coordinator may continue to assign PHA user roles as well as assign a PHA to the user, which is explained below in greater detail.

PHA User Role Assignment

The following are steps for the PHA's WASS security coordinator to provide users with access to the portal. Please wait two (2) business days for the security role to be effective.

Maintain User

User Information

User ID	
First Name	
Middle Initial	
Last Name	
User Status	Active
Coordinator	No
User Type	PHA User/Business Partner

Choose a Function

- Maintain User Information
- Maintain User Profile - Actions
- Maintain User Profile - Roles

3. Select "Maintain User Profile - Roles" & click Submit

Assign/Unassign Roles for User

User Information

User ID	
First Name	
Middle Initial	
Last Name	
User Staus	Active
Coordinator	No
User Type	

Please check/uncheck bo

Disabled roles cannot be u
appropriate Assignment M

OFPIH | OPFBI |

OFPIH - PIH Operating Fund

- ☐ OPD - PHA Executive Director
- ☐ OPE - OFPIH System PHA User
- ☐ OPI - OFPIH System PHA Read-Only User
- ☐ OPL - OFPIH Board Chair

OPFBI - Operating Subsidy-Business Intelligence

- ☐ OSP - PIH ObSub PHA User

4a. **Select only ONE** user role for access to the Public Housing Portal (see the explanation of roles in the table below)

4b. Select this user role for access to the OpFund MicroStrategy Reports

Then click on the ⬜ Assign/Unassign Actions button at the bottom of the screen.

PHA User Role Definitions

The graphic below describes the current and future capabilities of the User Roles. Only select ONE role for each user and select the role appropriate for the user.

System	Role	Description
Public Housing Portal	OPD	• **This user role is for the PHA's Executive Director only**. This user can create, edit, upload supporting documents, and manually or electronically sign or submit certifications, plans, forms, and other types of submissions.
Public Housing Portal	OPE	• This user can create, edit, and upload supporting documents for the submission. This user cannot sign or submit certifications, plans, forms, and other types of submissions.
Public Housing Portal	OPI	• This user can only read completed submissions. This user cannot create, edit, upload supporting documents, sign or submit certifications, plans, forms, and other types of submissions.
Public Housing Portal	OPL	• **This user role is for the PHA's Board Chair only.** This user can create, edit, manually or electronically sign required Board certifications, and upload supporting documents. This user cannot sign or submit plans, forms, or other types of submissions.
OpFund MicroStrategy Reports	OSP	• Read Only Role • This role does not require PHA assignment • This user can view OpFund unit status and Asset Repositioning Fee (ARF) reports

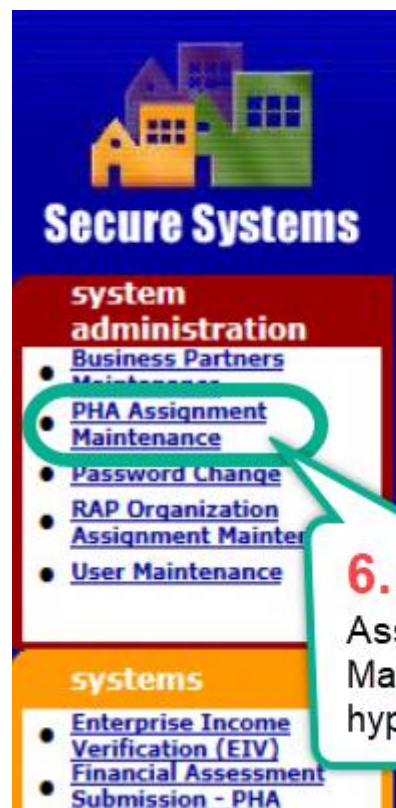## Assign/Unassign Role Confirmation for User

Roles to Assign to User MPG608		
System Code	**Role Code**	**Role Description**
OFPIH	OPI	OFPIH System PHA Read-Only User

No roles were selected to unassign.

5. Click Confirm

Confirm   Cancel

Secure Systems

system administration

- Business Partners Maintenance
- **PHA Assignment Maintenance**
- Password Change
- RAP Organization Assignment Mainter
- User Maintenance
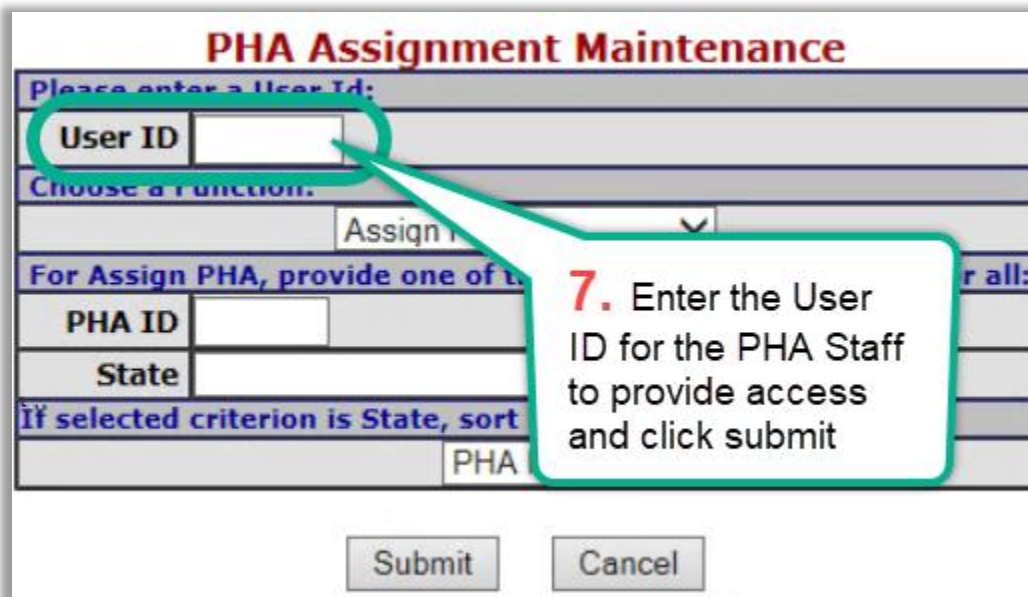
6. Click the "PHA Assignment Maintenance" hyper link

systems

- Enterprise Income Verification (EIV)
- Financial Assessment Submission - PHA

Note: The PHA assignment steps 7 through 12 are not required for the OpFund MicroStrategy user role OSP

Assign PHA Confirmation for User

User Information	
User ID	
First Name	
Middle Initial	
Last Name	

PHAs to Assign to User MLL555 for Role OPI .	
PHA ID	PHA Name
PHA Code	Public Housing Authoriy Name

11. Click Confirm → Confirm   Cancel

Successful Transaction

You have successfully assigned the PHA to User   [   ].

OK ← **12.** Click OK

Quick Guide: PHA WASS Coordinator & User Role Assignment

PHA WASS Coordinator Role Assignment Steps

I. Coordinator role assignment steps

1. Under "Maintain User Profile-Actions," the Coordinator box under "OFPIH - PIH Operating Fund" should be checked
2. At the bottom of the screen, select "Assign/Unassign Actions"
3. Select "OK"
4. Under "Maintain User Profile-Roles," check only <u>ONE</u> user roles under "<u>OFPIH - PIH Operating Fund</u>" (note: OPD role is designated for the ED or an authorized delegate)
5. At the bottom of the screen, select "Assign/Unassign Roles"
6. Select "Confirm" and Select "OK"

II. Select "PHA Assignment Maintenance" from the menu on the left of your screen

1. On the "PHA Assignment Maintenance" screen, your ID should be at the top
2. Scroll to the bottom of the screen and select "Submit"
3. On the next screen, highlight the roles previously selected
4. Highlight the PHA on the bottom half
5. Select "Submit"
6. Select "Confirm" and Select "OK"

Note: The WASS Coordinator only needs to be assigned once. Please wait two (2) business days for the security role to be effective.

PHA WASS PHA User Role Assignment Steps

I. User role assignment steps

1. Login as a WASS coordinator and select the PHA user ID
2. Under "Maintain User Profile-Roles," check only <u>ONE</u> user roles under "<u>OFPIH - PIH Operating Fund</u>" (note: OPD role is designated for the ED or an authorized delegate) and the OSP role under "OPFBI - Operating Subsidy-Business Intelligence"
3. At the bottom of the screen, select "Assign/Unassign Roles"
4. Select "Confirm" and Select "OK"

II. Select "PHA Assignment Maintenance" from the menu on the left of your screen. (*Note: these steps are not required for the OpFund MicroStrategy Reports user role OSP*)

1. On the "PHA Assignment Maintenance" screen, the PHA User ID should be at the top
2. Scroll to the bottom of the screen and select "Submit"
3. On the next screen, highlight the role previously selected
4. Highlight the PHA on the bottom half
5. Select "Submit"
6. Select "Confirm" and Select "OK"

Note: Please wait two (2) business days for the security role to be effective.

Unassign User Roles

The user abilities in the portal are adversely impacted when the users have two or more assigned user roles for the portal. Below is an image of a user with multiple roles for the portal in WASS.

The following steps guide the PHA's WASS security coordinator remove incorrect user roles from a user. Please wait two (2) business days for the security role to be effective.
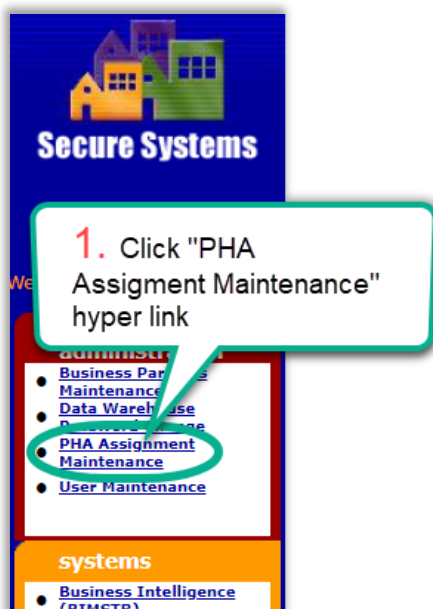
PHA Assignment

Please enter a User Id:

User ID [ ]

2. Enter the User ID

Choose a Function:

[Assign PHA ▼]

Assign PHA

3. Select "View or Unassign PHA

View or Unassign PHA

If selected criterion is State, sort by:

[PHA ID ▼]

4. Click "Submit"

[Submit]   [Cancel]

View/Unassign PHA for User [   ]

To unassign a PHA, check the box and click submit.

☐ Select/Deselect All

PHA ID	PHA Name	Role Code	Role Description
☐	Housing Authority	OPD	PHA Executive Director
☑	Housing Authority	OPE	OFPIH System PHA User
☑	Housing Authority	OPI	OFPIH System PHA Read-Only User

[Submit]   [Cancel]

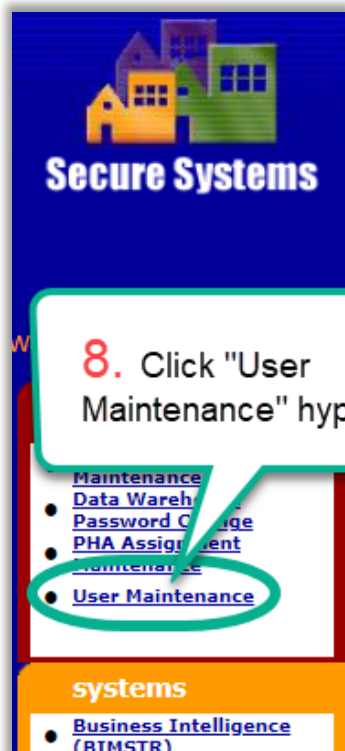5. Place a check mark on the roles to remove. *In this example the user retains the OPD- PHA Executive Director role.*

6. Click "Submit"

Successful Transaction

You have successfully unassigned the PHA from User [.].

[OK]

7. Click "OK"

Secure Systems

8. Click "User Maintenance" hyper link

Maintenance
- Data Wareh...
- Password C...ge
- PHA Assign...ent
- User Maintenance

systems
- Business Intelligence (BIMSTR)

User Maintenance

On this form, you can either search for a User by User ID, or search for Users by entering your search criteria.

Search by User ID
To search for a User by User ID, enter a User ID and then click the "Search for User" button.
User ID [   ] What's This?
(S)earch for User

9. Search by User

Search Users	or
To search for a User, enter a search criteria (optional) and then click the "Search Users" button.	
Business Partner - TIN/SSN/PHA ID/IPA ID [ ] What's This?	
First Name [ ]	Search by User Name
Last Name [ ]	
User Status [All ▾] What's This?	
☐ Check here to limit search to Independent Users	
Search (U)sers Cancel	

Maintain User

User Information

User ID	
First Name	
Middle Initial	
Last Name	
User Status	Active
Coordinator	Yes
User Type	PHA User/Business Pa...
Choose a Function	
Maintain User Profile - Roles ⌄	

Submit   Cancel

10. Select "Maintain User Profile - Roles"

11. Click "Submit"

Assign/Unassign Roles for User

User Information

User ID	
First Name	
Middle Initial	
Last Name	
User Staus	Active
Coordinator	Yes
User Type	PHA User/Business Partner

Please check/uncheck boxes to assign/unassign roles to the user

Disabled roles cannot be unassigned until they are removed in the appropriate Assignment Maintenance screens

OFPIH | OPFBI |

OFPIH - PIH Operating Fund

☑	OPD - PHA Executive Director
☑	OPE - OFPIH System PHA User
☑	OPI - OFPIH System PHA Read-Only User

OPFBI - Operating Subsidy-Business Intelligence

☐	OSP - PIH ObSub PHA User

Assign/Unassign Roles   Cancel

12. Remove the check marks for the roles to remove. *In this example the user retains the OPD - PHA Executive Director role.*

13. Click "Assign/Unassign Roles"

Assign/Unassign Role Confirmation for User

No roles were selected to assign.

Roles to UnAssign from User

System Code	Role Code	Role Description
OFPIH	OPE	OFPIH System PHA User
OFPIH	OPI	OFPIH System PHA Read-Only User

[Confirm] [Cancel]

14. Review that the changes are correct and click "Confirm"

Successful Transaction

You have successfully assigned/unassigned role(s) to user M46772.

[OK]

15. Click "OK"

It is recommended for the WASS security coordinator to repeat steps 8 through 11 to verify the user is assigned on one user role and user has the correct user role.

Verifying PHA User Role Assignment in Portal

Users may review their Role and PHA assignments from the portal. From the home page, click the "Role Assigned" button on the top right corner of the page.
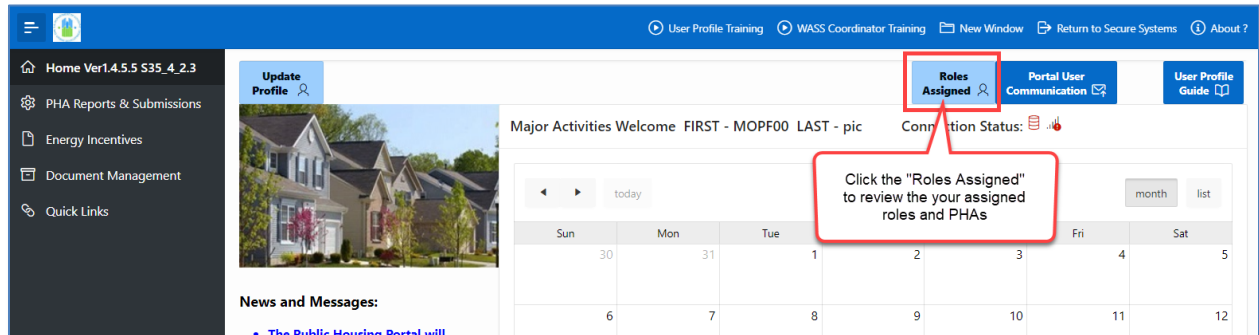
By clicking the button, a pop-up window reports the user's portal roles and associated PHAs:

Area 1: Reports portal roles and the associated PHA assigned to the user.

Area 2: Provides portal roles assigned to the user **WITHOUT** an associated PHA. The user should contact the PHA's WASS Security Coordinator to assign their PHA. Changes to the user's roles and assignments may take two business days to be effective.

Users must contact their WASS Security administrator to correct and update their roles and assignment.

In the portal, users that receive a "**Missing PHA Assignment**" warning and button means that the user role was not assigned to a PHA when the WASS Security Coordinator provided the user with access.
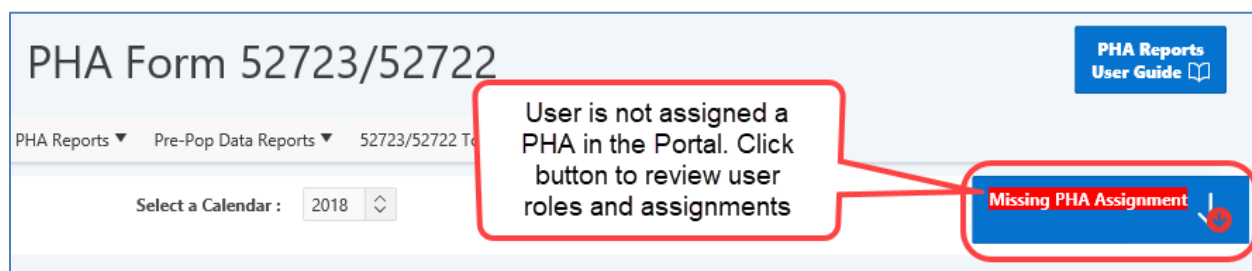
Click the Missing PHA Assignment button to open the pop-up window reporting the users portal roles and associated PHAs: Users must contact their WASS Security administrator to correct and update their roles and assignment.

System Maintenance and Software Updates

Users maybe be locked out of the portal during system maintenance and software updates. User will be notified when the system is offline with a warning message displayed on the Welcome Screen.
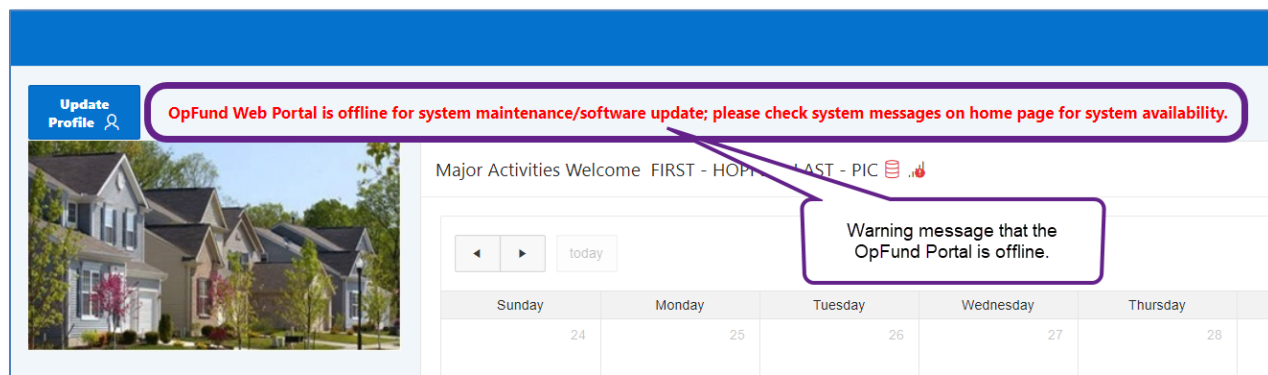
The portal will be available once the maintenance or update is complete.

How to Contact HUD for Support

If you have comments, questions, or need help finding information in the portal, we are here to help!

- If you have questions or technical issues regarding your access to the portal, contact the Real Estate Assessment Center – Technical Assistance Center (REAC-TAC) by calling 1-888-245-4860 Option #4 or send an email to REAC_TAC@hud.gov.
- For questions regarding technical issues with using the Public Housing Portal, contact publichousingportal@hud.gov.