

# Operating Fund Web Portal

## Public Housing Agency User Guide to Assigning WASS Roles for the OpFund Portal (For PHA users only)



U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

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## Operating Fund (OpFund) Web Portal – PHA Reports

The OpFund Portal brings the Operating Fund Grant process to a web-based platform. Public Housing Agencies (PHAs) can review current and historical form HUD-52723 and HUD-52722 data. PHAs can download reports and print the final forms HUD-52723 and HUD-52722 forms. PHAs can review the status of New Project Tools.

## Provide Access to the Operating Fund Web Portal

This Guide provides steps for the PHA's local Web Access Security Subsystem (WASS) security coordinator to provide PHA staff with access to the OpFund Portal. Page number 13 of this document provides quick steps. Find the OpFund Portal through Secure Systems URL

[https://hudapps.hud.gov/HUD\\_Systems](https://hudapps.hud.gov/HUD_Systems)

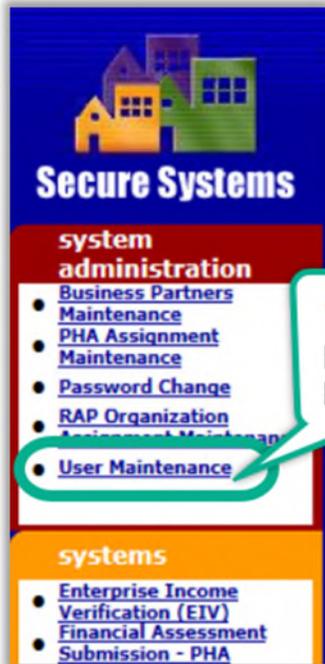
## Role Assignment

Any new role assignments take two (2) business days to be effective. Once the link "[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 OpFund Web Portal. Refer to the User Profile User Guide which is available here:

<https://www.hud.gov/sites/dfiles/PIH/documents/CY19-OpFund-FO-PHA-User-Profile-Guide.pdf>.

## Steps for the PHA WASS Coordinator Role Assignment

The following are steps the PHA's WASS security coordinator takes to obtain coordinator role for the OpFund 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.



1. Click the "User Maintenance" hyper link

### 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.

|                   |                      |                              |
|-------------------|----------------------|------------------------------|
| <b>User ID</b>    | <input type="text"/> | <a href="#">What's This?</a> |
| (S)earch for User |                      |                              |

2. Search by User ID

---

#### Search Users

or

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

|  |                                      |                              |
|--|--------------------------------------|------------------------------|
| <b>Business Partner - TIN/SSN/PHA ID/IPA ID</b>                          | <input type="text"/>                 | <a href="#">What's This?</a> |
| <b>First Name</b>  | <input type="text"/>                 |                              |
| <b>Last Name</b>   | <input type="text"/>                 |                              |
| <b>User Status</b>   | All <input type="button" value="v"/> | <a href="#">What's This?</a> |
| <input type="checkbox"/> 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

### Assign/Unassign Actions 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. For more information, see the appropriate Assignment Maintenance page.

[FASPHA](#) | [FASSUB](#) | [FHSEC3](#) | [LC](#) | [PIC](#) | [VMS](#) | [S](#)

**OFPIH - PIH Operating Fund**

|                                     |                      |
|-------------------------------------|----------------------|
| <input type="checkbox"/>            | ADM - Administration |
| <input checked="" type="checkbox"/> | COR - Coordinator    |

Make sure User Status is Active

**4.** Assign Coordinator action to the local WASS security coordinators

**Note:** This selection is grayed out if the COR - Coordinator role was already selected.

## 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

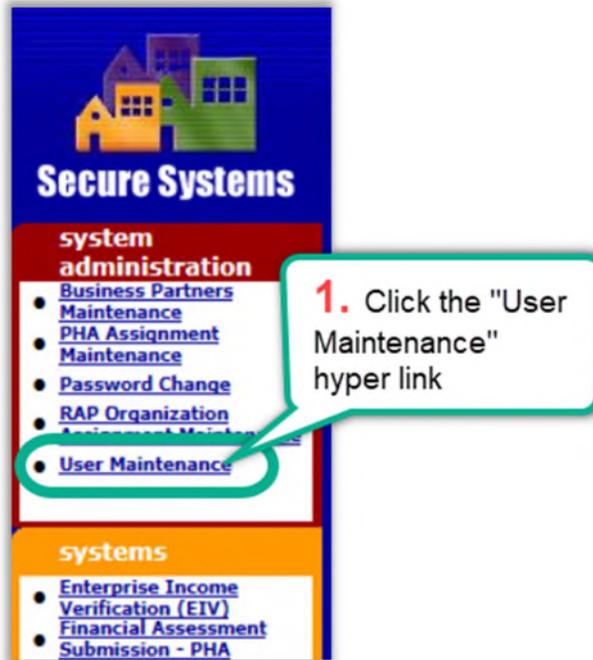
Cancel

For this role and any other new role assignments, please wait two (2) business days for the security role to be effective. Once the link "[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 OpFund Web Portal. Refer to the User Profile User Guide which is available here: <https://www.hud.gov/sites/dfiles/PIH/documents/CY19-OpFund-FO-PHA-User-Profile-Guide.pdf>.

**PHAs need to assign the WASS coordinator role only one time.** This assignment allows the WASS coordinator assign staff additional roles in the future. The WASS coordinator may continue to PHA user role assignment and PHA assignment explained below to provide user roles to other individuals

## PHA User Role Assignment

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



| <b>User Maintenance</b>  |   |
|--|---|
| On this form, you can either search for a User by User ID, or search for Users by entering your search criteria. |   |
| <b>Search by User ID</b>   |   |
| To search for a User by User ID, enter a User ID and then click the "Search for User" button.                    |   |
| User ID  | <input type="text"/> <a href="#">What's This?</a>                 |
| (S)earch for User  |   |
| <b>Search Users</b>  |   |
| 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   | <input type="text"/> <a href="#">What's This?</a>                 |
| First Name   | <input type="text"/>  |
| Last Name  | <input type="text"/>  |
| User Status  | All <input type="button" value="v"/> <a href="#">What's This?</a> |
| <input type="checkbox"/> Check here to limit search to Independent Users   |   |
| Search (U)sers   | Cancel  |

2. Search by User ID

Search by User Name

## 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 - Groups  |                           |
| Maintain User Profile - Roles   |                           |

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

| User Information |                           |
|------------------|---------------------------|
| User ID          |                           |
| First Name       |                           |
| Middle Initial   |                           |
| Last Name        |                           |
| User Staus       | Active                    |
| Coordinator      | No                        |
| User Type        | PHA User/Business Partner |

Please check/uncheck boxes to assign/unassign roles to this user.  
Disabled roles cannot be unassigned until the appropriate Assignment Maintenance screen is used.

[OFPIH](#) | [OPFBI](#) |

| OFPIH - PIH Operating Fund |                                       |
|----------------------------|---------------------------------------|
| <input type="checkbox"/>   | OPD - PHA Executive Director          |
| <input type="checkbox"/>   | OPE - OFPIH System PHA User           |
| <input type="checkbox"/>   | OPI - OFPIH System PHA Read-Only User |

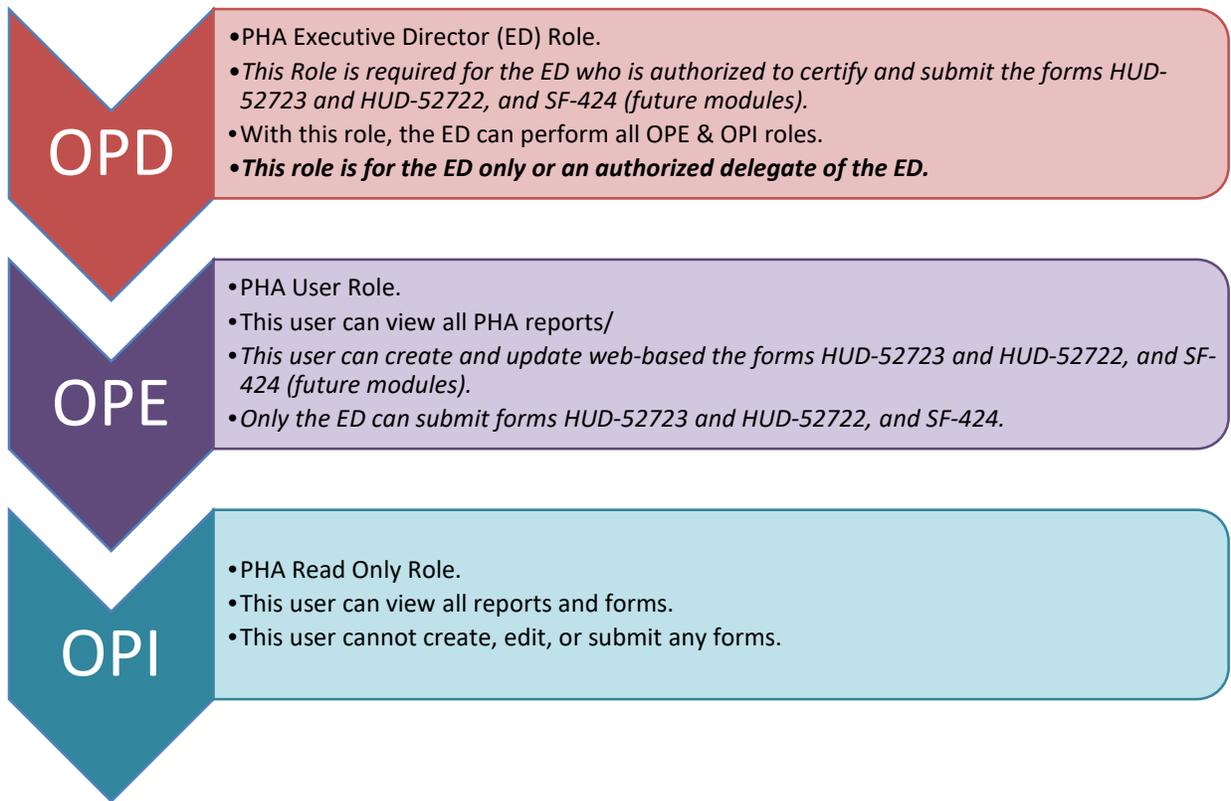
**OPFBI - Operating Subsidy-Business Intelligence**

|                          |                          |
|--------------------------|--------------------------|
| <input type="checkbox"/> | OSP - PIH ObSub PHA User |
|--------------------------|--------------------------|

4. Only select ONE user role (see graphic below) & click Assign/Unassign

## 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.**



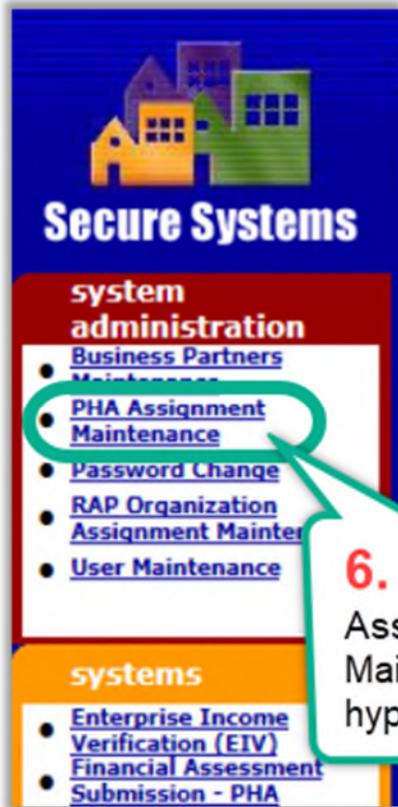
### Assign/Unassign Role Confirmation for User

| 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



6. Click the "PHA Assignment Maintenance" hyper link

A screenshot of the "PHA Assignment Maintenance" form. The form has a title "PHA Assignment Maintenance" in red. Below the title, it says "Please enter a User Id:". There is a text input field labeled "User ID" which is circled in green. Below that, it says "Choose a Function:" and there is a dropdown menu with "Assign" selected. Below that, it says "For Assign PHA, provide one of the following criteria:" and there are two text input fields: "PHA ID" and "State". Below these fields, it says "If selected criterion is State, sort by:" and there is a dropdown menu with "PHA" selected. At the bottom of the form, there are two buttons: "Submit" and "Cancel".

7. Enter the User ID for the PHA Staff to provide access and click submit



## 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 **ONE** user roles under “OFPIH - PIH Operating Fund” (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” 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. Coordinator role assignment steps

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

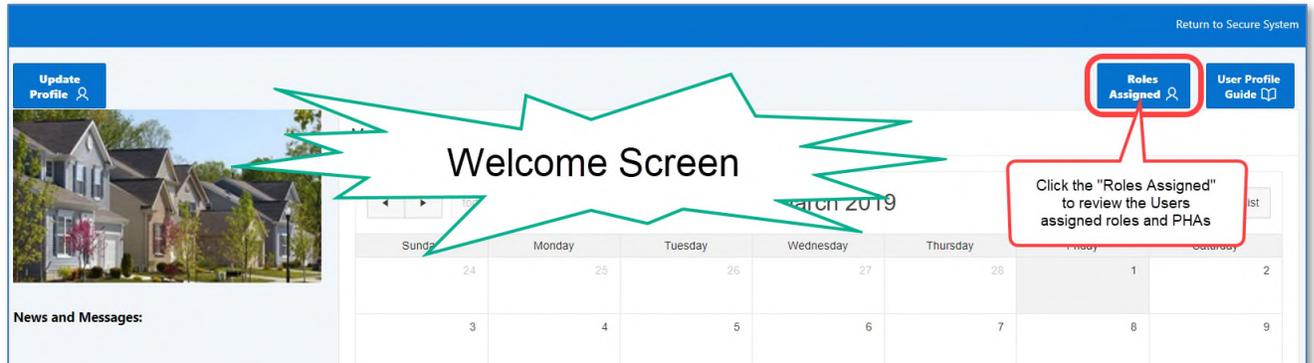
#### II. Select “PHA Assignment Maintenance” from the menu on the left of your screen.

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 roles previously selected
4. Highlight the PHA on the bottom half
5. Select “Submit”
6. Select “Confirm” and Select “OK”

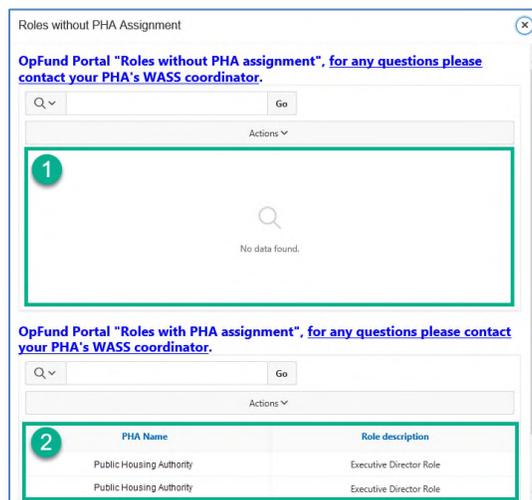
**Note:** Please wait two (2) business days for the security role to be effective.

## Verifying PHA User Role Assignment

Users may review their Role and PHA assignments from the OpFund Portal. From the Welcome Page, click the “Role Assignment” button on the top right corner of the page.



By clicking the button, a popup window reports the users OpFund Portal Roles and associated PHAs:

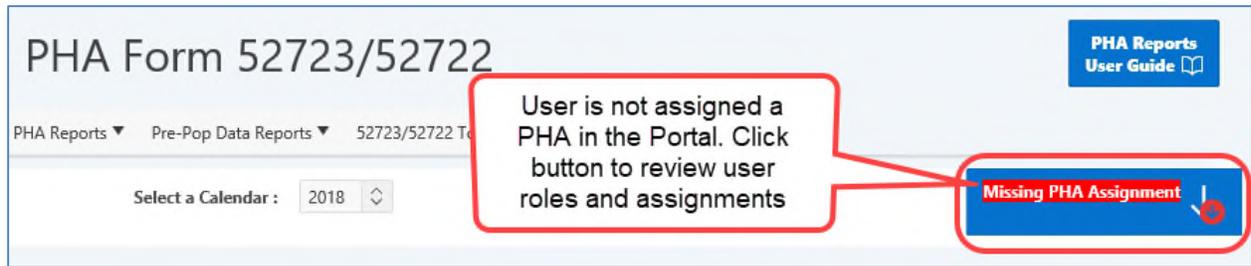


**Area 1:** Provides OpFund Portal roles assigned to the user **WITHOUT** an associated PHA. The user should contact the PHA’s WASS Security Coordinator to assign their PHA. Changes to the user’s roles and assignments may take two business days to be effective

**Area 2:** Reports OpFund Portal roles and the associated PHA assigned to the user.

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

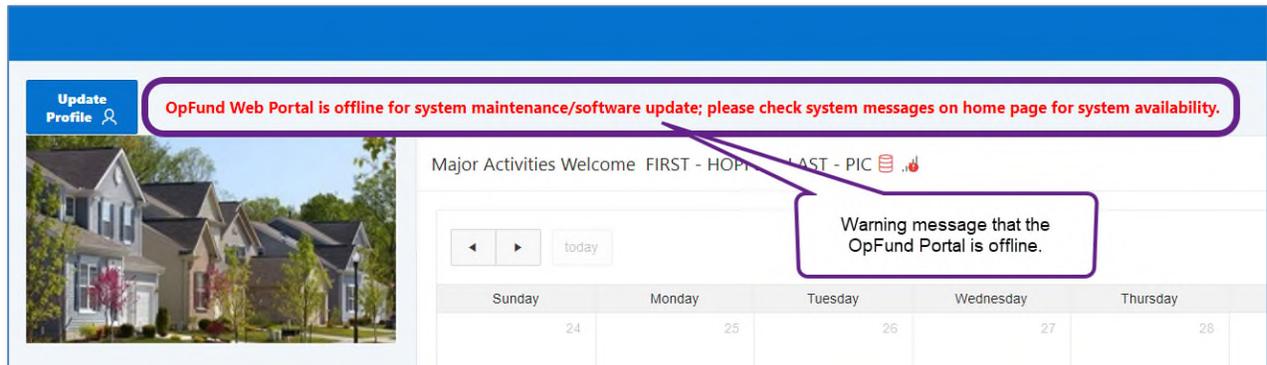
In the OpFund portal, users that receive a “Missing PHA Assignment” warning and button means that the user role was not assigned to a PHA when the WASS Security Coordinator provided the user with access.



Click the Missing PHA Assignment button to open the popup window reporting the users OpFund 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 OpFund 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 OpFund Portal will be available once the maintenance or update is complete.

## OpFund Web Portal Web Page

Refer to the OpFund Web Page for the latest updates and a link the User Profile User Guide:

[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/ph/am/webportal](https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/webportal)

HUD.GOV U.S. Department of Housing and Urban Development Secretary Ben Carson

PIH HOME ABOUT PIH PIH ONE-STOP TOOL PUBLIC HOUSING OPERATING FUND CAPFUND INDIAN HOUSING MORE HUD HOME

### Operating Fund Web Portal

The Operating Fund (OpFund) Web Portal brings OpFund processing to a web-based platform. Public and Indian Housing (PIH) Field Offices, and now Public Housing Agencies (PHAs) participate in OpFund processing by their web browser. PIH Field Offices submit and certify the FO version of the HUD 52723 and Form HUD 52722 through the OpFund Portal. Field Offices resolve Quality Control findings and submit Revisions to the HUD 52723 and HUD 52722 through the Portal. The Portal provides PHAs and Field Offices with historical HUD 52723s and HUD 52722s and various reports.

The OpFund program delivers \$4.5 Billion annually to 3,000 PHAs, approximately 7,000 public housing developments, and assistance to over 1.1 Million low-income families. The OpFund Web Portal is a resource for Field Offices to navigate through the nearly 14,000 OpFund requests submitted by PHAs and the 25 million data elements used to calculate OpFund eligibility. For questions or comments please contact REAC - Technical Assistance Center (TAC) by calling 1-888-245-4860 Option #4, Or send us email enquiry to [REAC\\_TAC@hud.gov](mailto:REAC_TAC@hud.gov).

**System Login**  
**Existing user? Login here**  
Public Housing Agency User  
**Need a new ID?**  
Public Housing Agency User

Sample View of data available to PHAs

PH Form 52723/52722 (Beta version review only)

First 30 AMPs for the PHAs Eligibility - LI

First 30 AMPs for the PHAs Eligible (Last Month) (LI) - 01/15

Click to E

**Link for User Profile User Guide**

### Highlights

- All current and first-time users to the OpFund Web Portal are required to complete their User Profile and validate their email address before using the OpFund Web Portal. Users need only complete their User Profile one time. The user guide below provides further instructions to complete a User Profile.
  - OpFund User Profile User Guide (Updated 1/23/2018 - PDF)
- Operating Fund released the New Project Request module to OpFund Web Portal. Now Field Offices submit New Project Requests for Operating Fund using this module. The module also provides Field Offices with status of their New Project Request. The New Project Request module replaces the New Project Request Excel spreadsheet.

## TAC Support

For questions or comments please contact REAC - Technical Assistance Center (TAC) by calling 1-888-245-4860 Option #4 or send an email to [REAC\\_TAC@hud.gov](mailto:REAC_TAC@hud.gov) or to your local field office contact.

## OpFund Feedback

Please provide your feedback on the OpFund Web Portal by email to [OpFundWebPortal@hud.gov](mailto:OpFundWebPortal@hud.gov).