

Operating Fund Web Portal

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



U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

December 20, 2020, Version 3.3

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Provide Access to the Operating Fund Web Portal

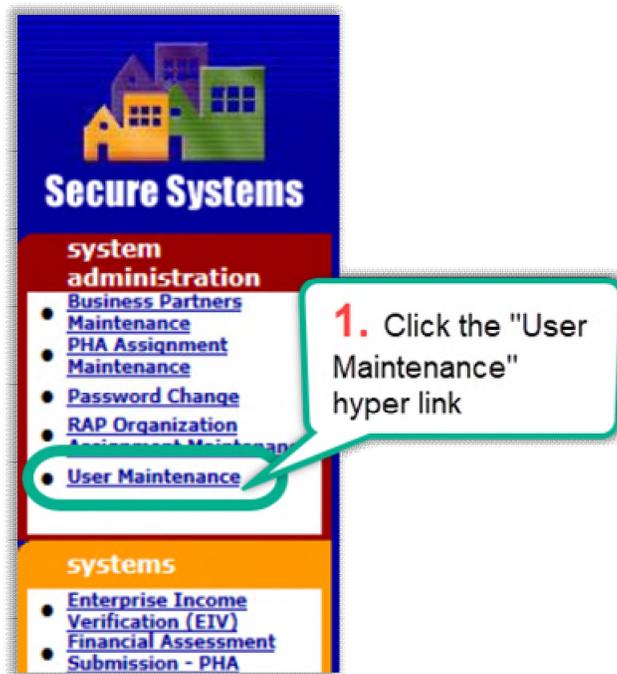
This guide provides steps for the PHA's local Web Access Security Subsystem (WASS) security coordinator to provide PHA staff and third-party support with access to the OpFund Portal. Page number 12 of this document provides quick steps. Find the OpFund Portal through Secure Systems URL https://hudapps.hud.gov/HUD_Systems.

Role Assignment

Any new role assignments take two (2) business days to be effective. Once the link "[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>.

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.



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

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

Assign/Unassign Actions for User

User Information	
User ID	
First Name	
Middle Initial	
Last Name	
User Status	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. Please refer to the appropriate Assignment Maintenance page for more information.

[FASPHA](#) | [FASSUB](#) | [FHSEC3](#) | [LOCAL](#) | [S.I](#)
[PIC](#) | [VMS](#) |

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.

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

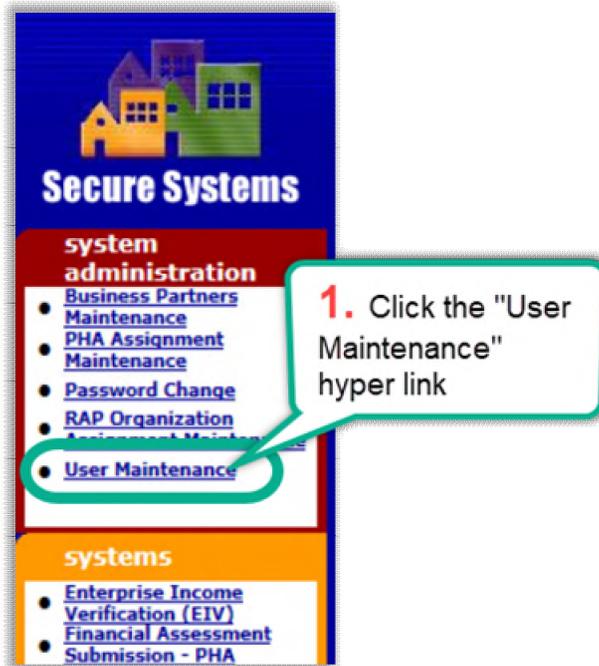
Confirm

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



The image shows a screenshot of the "User Maintenance" form. The form has a title "User Maintenance" and a subtitle "On this form, you can either search for a User by User ID, or search for Users by entering your search criteria." The form is divided into two main search sections: "Search by User ID" and "Search Users". The "Search by User ID" section has a text input field for "User ID" and a "Search for User" button. A callout box with a green border points to the "Search for User" button, containing the text: "2. Search by User ID". The "Search Users" section has a text input field for "Business Partner - TIN/SSN/PHA ID/IPA ID" and a "Search Users" button. A callout box with a green border points to the "Search Users" button, containing the text: "Search by User Name". Below the "Search Users" section, there are fields for "First Name", "Last Name", and "User Status" (a dropdown menu set to "All"). There is also a checkbox labeled "Check here to limit search to Independent Users". At the bottom of the form, there are "Search (U)sers" and "Cancel" buttons.

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. Disabled roles cannot be unassigned until the appropriate Assignment Maintenance screen is used.

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

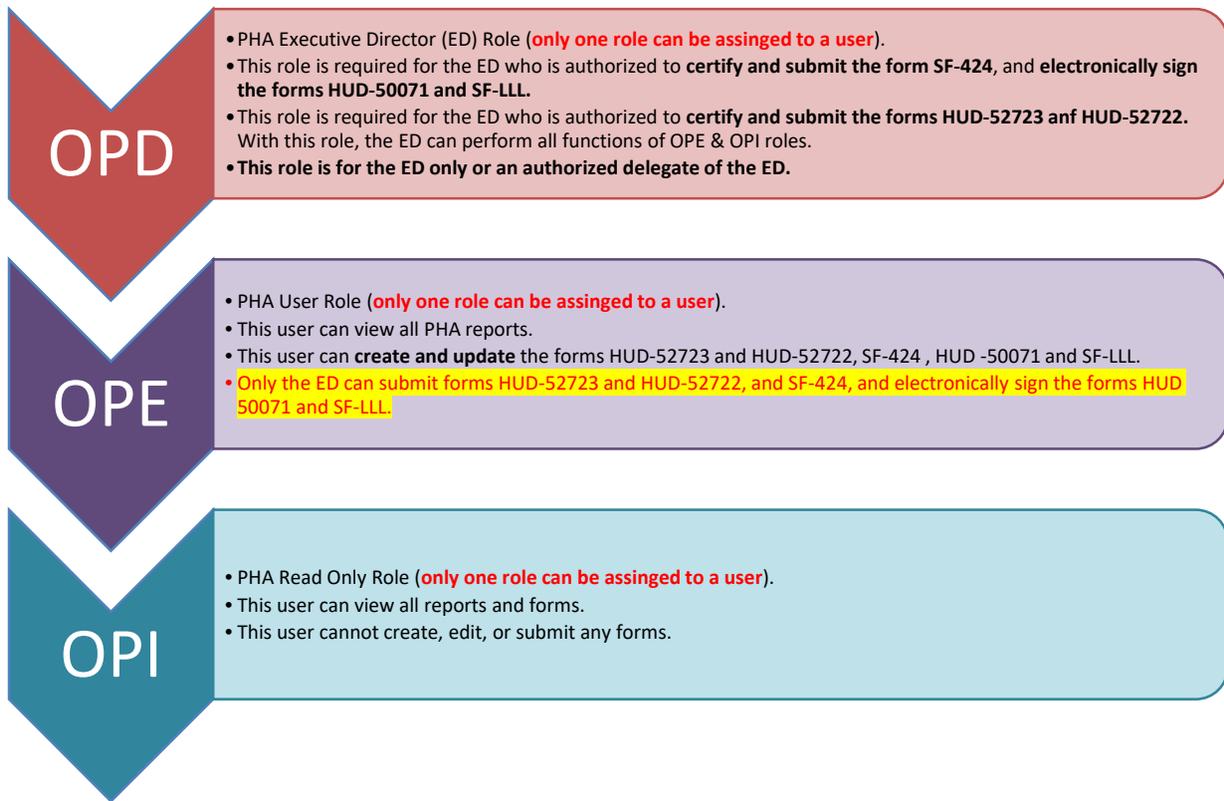
- OSP - PIH ObSub PHA User

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

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.**



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](#)

systems

- [Enterprise Income Verification \(EIV\)](#)
- [Financial Assessment Submission - PHA](#)

6. Click the "PHA Assignment Maintenance" hyper link

PHA Assignment Maintenance

Please enter a User Id:

User ID

Choose a Function:

Assign

For Assign PHA, provide one of the following:

PHA ID	<input type="text"/>
State	<input type="text"/>

If selected criterion is State, sort by:

PHA

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” 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 **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 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 OpFund Web Portal are adversely impacted when the users has two or more assigned user roles for the OpFund Web Portal. Below is an image of a user with multiple roles for the OpFund Web Portal in WASS.

Assign/Unassign Roles for User

User Information	
User ID	
First Name	
Middle Initial	
Last Name	
User Status	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 appropriate Assignment Maintenance screens
[OFPIH](#) | [OPFBI](#) |

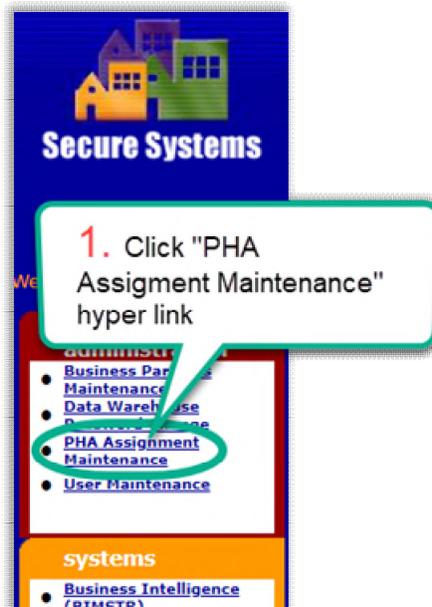
OFPIH - PIH Operating Fund	
<input checked="" type="checkbox"/>	OPD - PHA Executive Director
<input checked="" type="checkbox"/>	OPE - OFPIH System PHA User
<input checked="" type="checkbox"/>	OPI - OFPIH System PHA Read-Only User

OPFBI - Operating Subsidy-Business Intelligence	
<input type="checkbox"/>	OSP - PIH ObSub PHA User

Assign/Unassign Roles Cancel

User with more than one user role in the OpFund Web Portal

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

Choose a Function:

Assign PPHA

Assign PPHA

View or Unassign PPHA

If selected criterion is State, sort by

PHA ID

Submit Cancel

2. Enter the User ID

3. Select "View or Unassign PPHA"

4. Click "Submit"

View/Unassign PPHA for User []

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

Select/Deselect All

PHA ID	PHA Name	Role Code	Role Description
<input type="checkbox"/>	Housing Authority	OPD	PHA Executive Director
<input checked="" type="checkbox"/>	Housing Authority	OPE	OFPIH System PPHA User
<input checked="" type="checkbox"/>	Housing Authority	OPI	OFPIH System PPHA Read-Only User

Submit Cancel

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

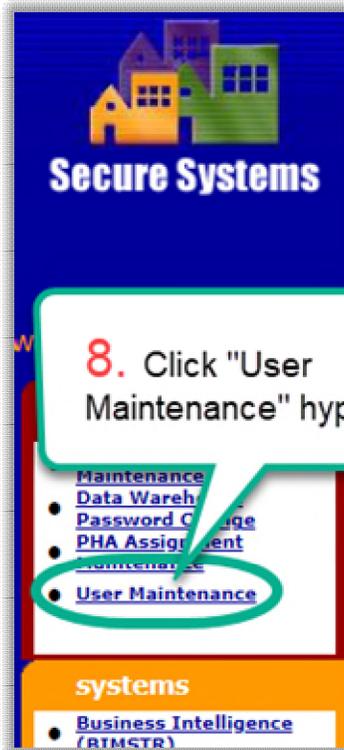
6. Click "Submit"

Successful Transaction

You have successfully unassigned the PPHA from User [].

OK

7. Click "OK"



8. Click "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.

User ID [What's This?](#)

(S)earch for User

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

9. Search by User

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 Partner
Choose a Function	
	Maintain User Profile - Roles

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 Status	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

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

OPFBI - Operating Subsidy-Business Intelligence

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

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

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

Confirm

Cancel

Successful Transaction

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

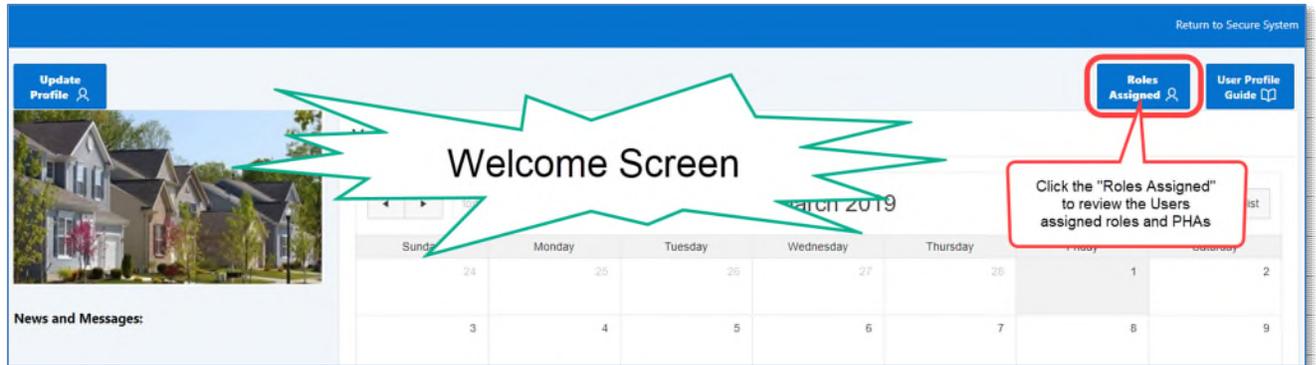
OK

15. Click "OK"

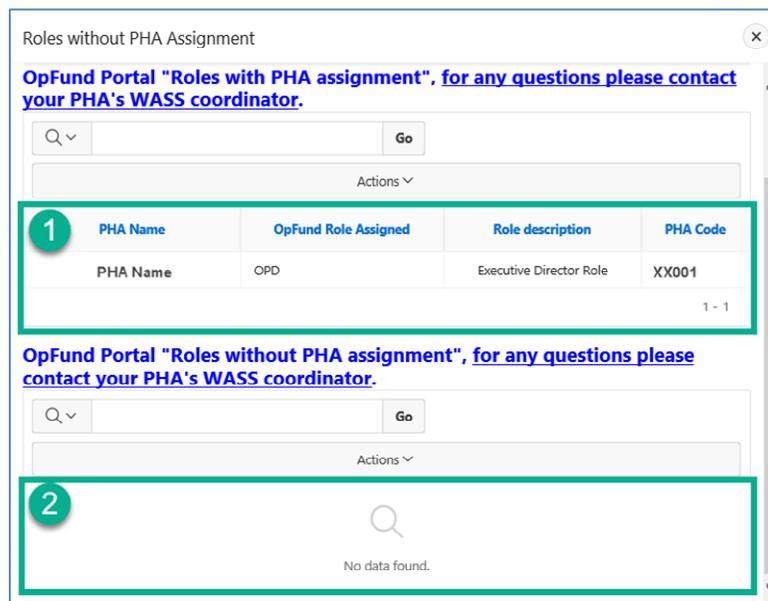
It is recommended for the WASS security coordinator to repeat steps 8 through 11 to verify the user is assigned on one user role and user has the correct user role.

Verifying PHA User Role Assignment in OpFund Portal

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



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

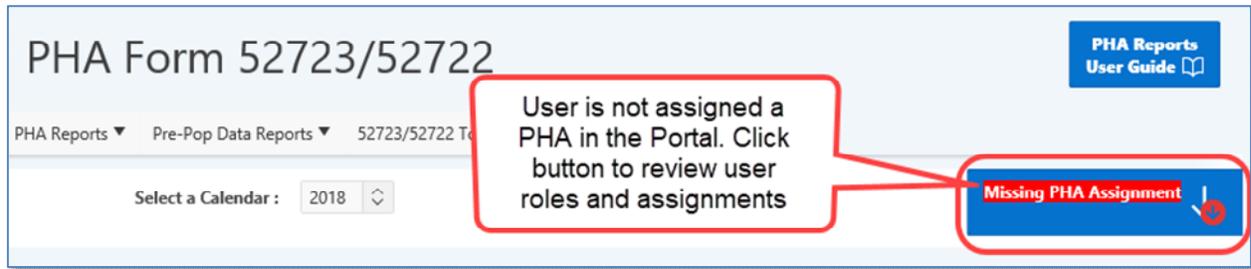


Area 1: Reports OpFund Portal roles and the associated PHA assigned to the user.

Area 2: 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.

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

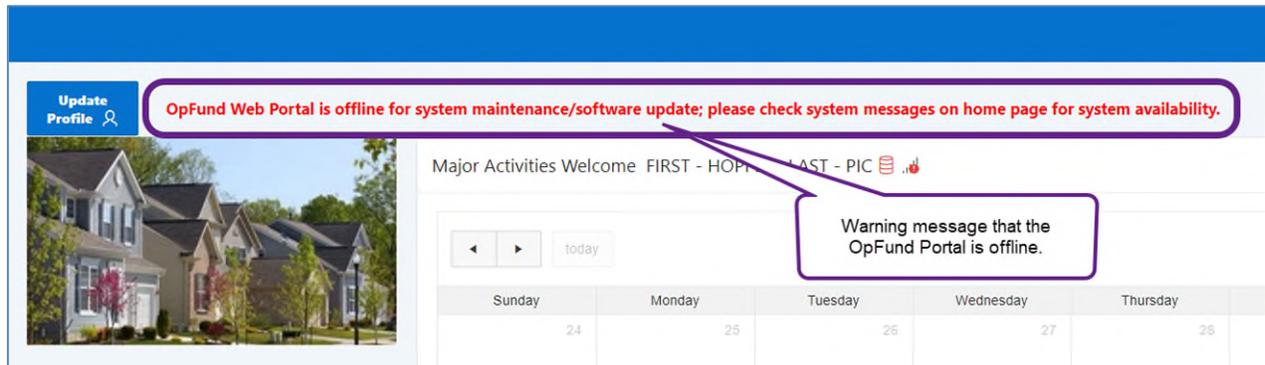
In the OpFund portal, users that receive a “Missing PHA Assignment” warning and button means that the user role was not assigned to a PHA when the WASS Security Coordinator provided the user with access.



Click the Missing PHA Assignment button to open the pop-up 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 to the User Profile User Guide: https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/webportal

The screenshot shows the HUD.GOV website for the Operating Fund Web Portal. The page includes a navigation menu, a main heading, and a description of the portal's purpose. A callout box with a red border and a red arrow points to a link labeled "Link for User Profile User Guide" which is located below a "Highlights" section. The "Highlights" section contains a list of updates, with the first item, "OpFund User Profile User Guide (Updated 1/23/2018 - PDF)", circled in red. The background of the screenshot shows various data visualizations, including a pie chart and a bar chart, under the heading "Sample View of data available to PHAs".

How to Contact HUD for Support

REAC-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.

OpFund Feedback

Please provide your feedback on the OpFund Web Portal by email to OpFundWebPortal@hud.gov