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

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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.

<table>
<thead>
<tr>
<th>User ID</th>
<th>What's This?</th>
</tr>
</thead>
<tbody>
<tr>
<td>(S)earch for User</td>
<td></td>
</tr>
</tbody>
</table>

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
- **First Name**
- **Last Name**
- **User Status**
- **Check here to limit search to Independent Users**

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

#### Maintain User

**User Information**

<table>
<thead>
<tr>
<th>User ID</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>First Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Middle Initial</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Last Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>User Status</th>
<th>Active</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Coordinator</th>
<th>Yes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>User Type</th>
<th>PHA User/Business Partner</th>
</tr>
</thead>
</table>

**Choose a Function**

- Business Partners Maintenance
- Maintain User Information
- Maintain User Profile - Actions
- Maintain User Profile - Groups
- Maintain User Profile - Roles
- Resend Letter
Click on the **Assign/Unassign Actions** button at the bottom of the screen.

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**Assign/Unassign Actions for User**

<table>
<thead>
<tr>
<th>User Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle Initial</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>User Status</td>
</tr>
<tr>
<td>Coordinator</td>
</tr>
<tr>
<td>User Type</td>
</tr>
</tbody>
</table>

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

- Disabled roles cannot be unassigned inappropriate Assignment Maintenance.
- FASPHA | FASSUB | FHSEC3 | LG | PIC | VMS |

**OFPIH - PIH Operating Fund**

- ADM - Administration
- COR - Coordinator

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

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

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Make sure User Status is Active
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.
Then click on the **Assign/Unassign Actions** button at the bottom of the screen.

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

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.

OPD

- PHA Executive Director (ED) Role (only one role can be assigned to a user).
- This role is required for the ED who is authorized to certify and submit the form SF-424, and electronically sign the forms HUD-50071 and SF-LLL.
- This role is required for the ED who is authorized to certify and submit the forms HUD-52723 and HUD-52722. With this role, the ED can perform all functions of OPE & OPI roles.
- This role is for the ED only or an authorized delegate of the ED.

OPE

- PHA User Role (only one role can be assigned to a user).
- This user can view all PHA reports.
- This user can create and update the forms HUD-52723 and HUD-52722, SF-424, HUD-50071 and SF-LLL.
- Only the ED can submit forms HUD-52723 and HUD-52722, and SF-424, and electronically sign the forms HUD-50071 and SF-LLL.

OPI

- PHA Read Only Role (only one role can be assigned to a user).
- This user can view all reports and forms.
- This user cannot create, edit, or submit any forms.

Assign/Unassign Role Confirmation for User

5. Click Confirm
6. Click the "PHA Assignment Maintenance" hyper link

7. Enter the User ID for the PHA Staff to provide access and click submit
8. Select the recently assigned user role

9. Highlight your PHA Code - PHA Name

10. Click Submit

11. Click Confirm

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 **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.

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.
2. Enter the User ID

3. Select "View or Unassign PHA"

4. Click "Submit"

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"

7. Click "OK"
8. Click "User Maintenance" hyper link

9. Search by User or Search by User Name
10. Select "Maintain User Profile - Roles"

11. Click "Submit"

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"
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.

![Missing PHA Assignment](image)

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 may 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.

![System Maintenance](image)

The OpFund Portal will be available once the maintenance or update is complete.
OpFund Web Portal Web Page

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 REACTAC@hud.gov.

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