Enterprise Income Verification (EIV 9.5)

System User Administration Manual

for

Public and Indian Housing Program

U.S. Department of Housing and Urban Development

April 2013

Revision History

Note: **This is an extract from the EIV Operations Manual, portions of which are restricted.**

Version	Date	Comments required	Approvals required
Version 1.0	01/30/03	Initial Draft	
Version 1.1	03/24/03	Build 2 Updates incorporated	
Version 2.0	03/31/03	Build 2 Release	
Version 2.1	05/14/03	Build 2.1 Updates	
Version 3.0	08/01/03	Build 3 Release	
Version 3.0.1	11/07/03	Build 3 Patch Release	
Version 3.0.3	02/24/04	Build 3.0.3 Patch Release	
Version 3.1	05/18/04	Build 3.1 Release	
Version 3.1	08/06/04	Build 3.1 Release Updates	
Version 3.2	02/03/05	Build 3.2 Release	
Version 4.0	09/16/05	Build 4.0 Release	
Version 5.0	03/10/06	Build 5.0 Release	
Version 6.0	08/17/2006	Build 6.0 Release	
Version 7.0	09/29/2006	Separated MF from PIH Manual	
Version 8.0	06/11/2007	Build 7.0 Release	
Version 9,0	10/31/2007	Build 8.0 Release	
Version 10.0	02/28/2008	Build 8.1 Release	
Version 11.0	08/10/2009	Updated for Release 9.0	
Version 11.1	08/25/2009	Updated based on initial review	
Version 12	04/12/2010	Build 9.1 Release	
Version 13	10/13/2011	Build 9.2.1 Release	
Version 14	03/14/2012	Build 9.3 Release	

Version	Date	Comments required	Approvals required
Version 15	09/27/12	Build 9.4 Release	
Version 16	04/25/2013	Build 9.5 Release	

EIV PIH User Administration
Authorization Memorandum

I have carefully assessed the EIV User Administration Manual for Public Housing Program. This document has been completed in accordance with the requirements of the HUD System Development Methodology.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

_____   _____
Ted Taylor   Date
IT Project Manager

_____   _____
 Nelson Stephens   Date
PIH Program Manager

Table of Contents

1 Preface

1   Preface

1.1   Document Overview

The purpose of this manual is to provide instructions for HUD personnel (Office of Public and Indian Housing and Office and Housing) and HUD business partner personnel responsible for user administration in the Enterprise Income Verification (EIV) application. It details business operational procedures for successfully performing user administration tasks through EIV user interface.

1.1.1   How This Manual is organized

Listed below are each of the chapters contained in this manual, along with a brief description of its content:

- **Chapter 1, Preface** – An overview of the document and who should use this manual.

- **Chapter 2, User Maintenance in WASS** – Provides instruction on the how to maintain the user profiles for the Office of Public and Indian Housing (PIH) before the user can access the EIV online functions.

- **Chapter 3, Public Housing Program User Administration** – Provides instruction on the functions available to Public Housing program User Administrators.

- **Appendix A, Abbreviations and Acronyms** – Provides a list of commonly used abbreviations and acronyms.

1.1.2   Who Should Use This Manual?

- This manual is intended for the following users:

- EIV WASS Coordinator

- Public Housing Program users with User Administration role

- Below are the basic responsibilities of these users:

  - **EIV WASS Coordinator:** responsible for performing user maintenance, which includes assignment of EIV roles and actions and PHA or contract/project associated to EIV using WASS online functions. The WASS functions available to EIV WASS Coordinator are described in Chapter 2 of this document.
  - **PIH User Administrator:** responsible for the assignment of Public Housing program user roles, maintenance of user role expiration date, certification of Public Housing program user roles and other user administration functions available in EIV online as described in Chapter 3 of this document.

If you have other roles or other action codes, you may need to access other documents in EIV library to learn more about them. For more information about the content of the EIV library, refer below to the Related Documentation section of this document.

This manual assumes the resources assigned to these roles have the following knowledge or expertise:

- Working knowledge of Microsoft Windows.

- Operational understanding of PC's.

- Operational understanding of Internet browsers.

- Understanding of basic network concepts.

- Understanding of HUD program terminology, policies, and procedures.

1.1.3 Related Documentation

This section provides a list of related documentation. The EIV library includes the following document:

- *EIV User Manual – For Public Housing Program Users* – For Public Housing program users of the EIV wage and income functionality, this manual provides step-by-step instructions. Users should be familiar with PCs, Microsoft Windows, and their browser software.

- *EIV Operations Manual – Security Administration* – For Public Housing program EIV Security Administrators and Office of Housing EIV Security Administrators, this manual provides step-by-step instructions on the security administration available in EIV.

- *WASS User's Manual* – For Coordinator, this manual provides step-by-step instructions on how to perform maintenance of user profile including roles and PHA assignment before the user can access EIV functions

1.1.4 Abbreviations and Acronyms

A glossary of abbreviations and acronyms is included as **Appendix A** of this document.

2 User Maintenance in WASS

2   User Maintenance in WASS

The **WASS User Maintenance** is the first step for an EIV WASS Coordinator in setting up the privileges for EIV users before they can access the EIV online functions.

2.1   User Maintenance in WASS for PIH External Users

The are two requirements before an EIV User Administrator can assign EIV roles to a PIH External user ID within the jurisdiction of his/her office via EIV online
The requirements are:

- EIV Public Housing program user ID's must be active in PIC User Administration. That means that a Public Housing program user will not be available in EIV User Administration if the WASS ID is not defined in PIC or the user is not currently active in PIC.
- PHA users are assigned the EIV role in WASS and at least one PHA is assigned to that user.

The steps to follow in WASS are

- *User Maintenance Search Option*
- *Maintain User Profiles-Roles*
- *Assign PHA*

2.1.1   User Maintenance Search option

1. From the WASS Main Menu, choose the User Maintenance link under System Administration as shown below.   It also may be selected from the list on the left navigation panel.

2. After selecting the *User Maintenance* link, the screen shown below allows the Coordinator to search for a User ID.

3. Enter the User ID in the text box and click on **Search for User**. The Maintain User Page is displayed.

2.1.2 Maintain User Profiles-Roles

1.   Choose the function **Maintain User Profile-Roles** from the drop-down list as shown below.

2.   When the Maintain User Profile-Roles function is selected, the **Assign/Unassign Role** page is displayed. Click in the **EIV – PIH EIV External User** checkbox to assign EIV role to the User ID as shown below.

3. Click the **Assign/Unassign Roles** button.

4. Once the EIV role is assigned to a user, go back to WASS Main Menu.

Note: For PHA Users, the assignment of the EIV action in WASS, is no longer a required. However, it is required for HUD (Internal) Public Housing program users.

2.1.3 Assign PHA

The Coordinator assigns PHA's and applicable roles through the PHA Assignment function available in WASS. To assign PHA to a user, follow these steps:

1. Click on the PHA Assignment Maintenance link under System Administration as shown below. This is the mechanism that allows the assignment of PHA's to a PHA user. That will make possible the subsequent assignment in EIV User Administration of EIV roles to that WASS ID for the same PHA's.
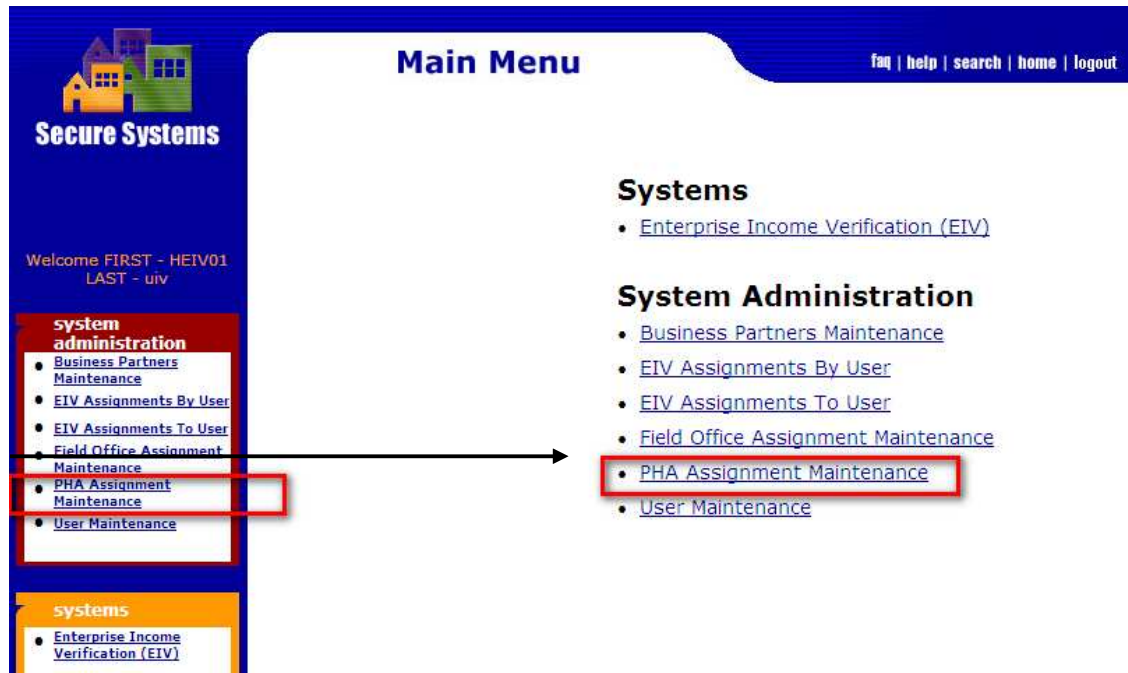
2. Clicking the PHA Assignment Maintenance link calls up the PHA Assignment Maintenance page. As shown below, please enter the User ID and choose **Assign PHA** from the function drop-down list, and then click the **Submit** button.

3. Enter the PHA ID to be assigned to User ID as shown below and click the **Submit** button.

4. When the **Submit** button is clicked; the **Assign PHA for User** page is displayed. Choose PIH – External User (EIV-EIV) from the list of roles, the PHA to be assigned to a User ID (e.g. GA137) from the list of PHA's and click the **Submit** button as shown below.

5. When the **Submit** button is clicked, a confirmation page is displayed as illustrated below. Click the **Confirm** button to confirm assignment of the PHA.

2.2   WASS User Maintenance for HUD PIH (Internal) Users

There are two requirements before a User Administrator can assign EIV roles to a HUD employee ('H') or HUD contractor ('C') User ID within the jurisdiction of his/her office. The requirements are:

- EIV User ID's must be active in PIC User Administration.
- The users are assigned the EIV role in WASS.

The steps to follow in WASS are

- *User Maintenance Search Option*
- *Maintain User Profiles-Roles*

2.2.1 User Maintenance Search option

To search users in WASS, follow these steps:

1. From the WASS Main Menu, choose the <u>User Maintenance</u> link under System Administration as shown below.   It also may be selected from the list on the left navigation panel.

2. After selecting the *User Maintenance* link, the screen shown below allows the Coordinator to search for a User ID.

3. Enter the User ID in the text box and click on **Search for User**. The Maintain User Page is displayed.

2.2.2 Maintain User Profiles-Roles

1. Choose the function Maintain User Profile-Roles from the drop-down list as shown below.

2. When the Maintain User Profile-Roles function is selected, the **Assign/Unassign** Role page is displayed. Click in the **IIV – PIH – EIV Internal Users Access** checkbox to assign EIV role to the User ID as shown below.

3. Click the **Assign/Unassign** Roles button. The following screen is displayed. Click the **Confirm** Button to confirm the role assignment.

3 Public Housing Program User Administration

3 Public Housing Program User Administration

This section covers the functions available for Public Housing program User Administrator.

3.1 Role Assignment in EIV User Administration

EIV uses a role-based authorization scheme to grant Public Housing program user access to EIV content and functionality. The system offers a variety of pre-defined roles at each security level.

To access the User Administration function in EIV, the user needs to have the User Administrator role assigned within the user's security level.

There are pre-defined set of functions and permissions associated with each role. In order to access EIV system content and functionality, each Public Housing program user must have at least one role assigned to his/her ID. The use of the **By Roles** option within the EIV User Administration module is one of two ways in which roles may be assigned to a user's WASS ID. The other is through the use of the **By Users** option.

3.2 Search for User Information

There are two methods for searching for user information in EIV:

The **By Roles** option allows you to first locate a particular role, and then add or remove users from the role. Access available roles by clicking the By Roles link appearing under the User Administration heading on the EIV (left-side) Navigation Panel

The **By Users** option enables the User Administrator to select a security level from which to pick individual user IDs for possible assignment or removal of one of more roles individually or for a group at the same security level. Access available users by clicking the By Users link appearing under the User Administration heading on the EIV (left-side) Navigation Panel

3.2.1 Search Methods

3.2.1.1 By Roles

Select the <u>By Roles</u> link on the EIV navigation panel available for Public Housing program users when you want to locate the users associated with a particular security level and role. When selected, this option opens the **Security Levels List** page. This page provides all the tools needed to help you quickly and easily select a security level, add, view/remove and download user list.

Enterprise Income Verification			HUD Home	PIH Home	EIV Home	Search	Email

User Administration >> By Roles

Printer-Friendly Version
Download in Excel

Security Level: HQ - HUD Headquarters

Actions	Role	Users
⊞ 🔍 🌐	DCG	0
⊞ 🔍 🌐	HQ Field Operations	1
⊞ 🔍 🌐	HQ OIG	162
⊞ 🔍 🌐	HQ Occupancy	49
⊞ 🔍 🌐	HQ PIH DHAP	4
⊞ 🔍 🌐	HQ Security Admin	5
⊞ 🔍 🌐	HQ Senior Mgt	2
⊞ 🔍 🌐	HQ System Admininstrator	6
⊞ 🔍 🌐	HQ User Administrator	10
⊞ 🔍 🌐	PIH Help Desk/TAC	6

Security Level: HUB - HUB

Actions	Role	Users
⊞ 🔍 🌐	HUB Occupancy Specialist	101
⊞ 🔍 🌐	HUB Security Administrator	19
⊞ 🔍 🌐	HUB User Administrator	43

Security Level: FO - Field Office

Actions	Role	Users
⊞ 🔍 🌐	FO Occupancy Specialist	294
⊞ 🔍 🌐	FO Security Admininstrator	63
⊞ 🔍 🌐	FO User Administrator	119

Security Level: PHA - Public Housing Agency

Actions	Role	Users
⊞ 🔍 🌐	PHA DHAP Assistance	70
⊞ 🔍 🌐	PHA Occupancy - Application Processor	1,884
⊞ 🔍 🌐	PHA Occupancy - Public Housing	10,849
⊞ 🔍 🌐	PHA Occupancy - Voucher	12,123
⊞ 🔍 🌐	PHA Security Administrator	3,324
⊞ 🔍 🌐	PHA User Administrator	4,825
⊞ 🔍 🌐	Program Administrator - Public Housing	3,860
⊞ 🔍 🌐	Program Administrator - Voucher	3,245

Associated to each role record are the tools needed to manage user administration activities. The following tools accompany each record:
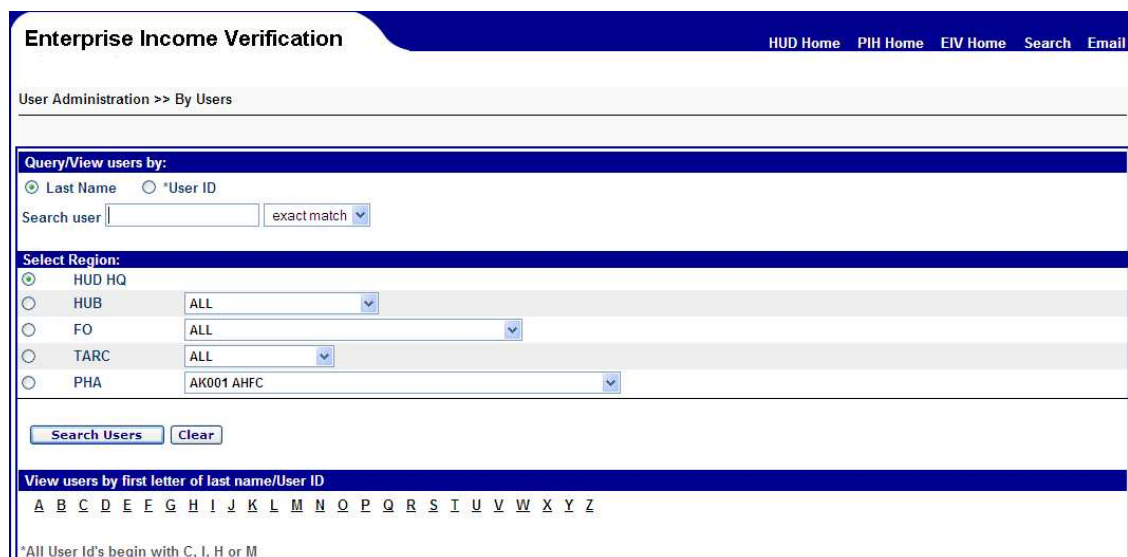
Icon	Description
	Add User tool – Select this tool when you want to add a user to the specified role. When selected, this tool launches the **By Roles** page. This page allows you to construct a search query that will locate the user you want to add to the role. Once located, the user ID can be assigned the role.
	View/Remove Users tool – Select this tool when you want to view a list of the users associated with the specified role. When selected, this tool launches the **User List** page. This page allows you to view and update user role information and remove user IDs that are assigned a role.
	Download Excel Report tool – Select this tool when you want to download the list of users with any role into Microsoft Excel. When selected, this tool opens a 'File Download' dialog box, which allows the user to 'Open' or 'Save' the report containing the list of User IDs with the selected Role.

Start the search process by first selecting the appropriate security level. Once you have made a selection, use the **View/Remove Users** tool (magnifying glass 🔍) appearing adjacent to the role record for which you wish to view user profile information. Once the user clicks on the magnifying glass icon, the results appear on a search results page. Once the search criteria, the Search Result page is displayed. Refer to Section 3.2.2 for description of the **Search Result.**

To print the report, Click on the **Printer-Friendly** link on the By Roles page

3.2.1.2   By Users

Select the <u>By Users</u> link on the EIV navigation panel available for Public Housing program users when you want to locate a particular user or group of users. The **By Users** page as shown below provides different ways to quickly and easily locates user profile information.

On this page, you will find the following search components:

- Last Name/User ID Query

- Alphabetical List Query

The search is performed based on combination of the search components, i.e., Region Query and either Last Name/User ID Query or Alphabetical List Query. Described below are the different query options.

3.2.1.2.1 Last Name/User ID Query

Use this component when you want to construct a query that searches for user profile information using either a **Last Name** or a **User ID** as shown on the screen below.


The first portion of the search is the **Query/View users by**. There is a radio button for each search option. By default, the **Last Name** option is active when the page is launched. Click the radio button adjacent to a search option to select it. The selected search option works in combination with that defined by the Region Query portion of the page.

Once you have selected a search option, use the textbox adjacent to the **Search User** textbox to specify your search criteria. Enter a complete or partial last name/user ID, and then select one of the following wildcard search options:

- **Exact match** – Search results must match the specified text, exactly. Use this option when you want to target a specific name. By default, this option is active when the page is launched.

- **Begins with** – Search results include all the last names/user IDs beginning with the specified letters. Use this option when you want the search results to include a list of names/IDs beginning with certain characters.

The second portion of the search screen is the **Select Region**. Use this portion to construct a query that limits the search to a specific region of the HUD organization. You will find the option useful when you want to apply the same role changes to a group of users in one or all of the entities associated with a particular region. For example, change the role responsibilities for all the users in a particular PHA, or a group of users in all of the PHA's.

There is a radio button for each regional option. By default, the **HUD HQ** option is selected when the page is launched. You search is limited to one region option at a time. Where applicable, a

selection list accompanies a regional option. The selection list allows you to designate which entity (within the region) you wish to include in the search. You can select one, or all of the available entities. By default, the **All** option is selected when the page is launched.

Click the **Arrow** adjacent to the textbox associated with a region to view a list of entities in that region. Entity options are listed in order, according to name. Numeric names appear first, followed by those that are a combination of numbers and letters. Highlight an option to select it. Once selected, the entity name appears in the textbox adjacent to the region option.

Region selection works in combination with the search option specified in the Last Name/User ID Query portion of the page.

For users with **more than one PHA assignment**, select the Last Name or User ID radio button, enter the Last Name or User ID depending on the option selected and choose the PHA radio button with ALL option as indicated below.

3.2.1.2.2 Alphabetical List Query

Use this component of the **Search Users by Region** page as shown on the screen below when you want to construct a query that limits the search to either the user's last name or ID for those that begin with a specific letter of the alphabet.

This component of the form may be used in combination with Select Region Query components to narrow your search. For example, search for those users whose user ID begins with (**T**), within a specified entity of a designated region.

You can view an alphabetical listing of either user names or user IDs by selecting the appropriate letter of the alphabet. Located at the bottom of the **Search Users by Region** page you will find the letters of the alphabet, represented as hypertext links. Click a letter to display a list of users whose last name or user ID begins with the selected letter.

You can view user information, by either a last name or user ID. At the top of the page, there is a radio button for each viewing option. By default, the **Last Name** option is active when the page is launched. Click the radio button adjacent to the desired search option.

Once the search criteria, the Search Result page is displayed. Refer to Section 3.2.2 for description of the **Search Result.**

3.2.2 Search Results

3.2.2.1   By Roles

The results of a search **By Role** appears on the **Users by Role List** page as shown below.

The search results are also stored in a **User List** table. The table includes a record for the Security Level and role selected. The records displayed are initially sequenced by User ID.

For Public Housing program users with **Multi-PHA assignment**, the search results page appears as shown below.

Search results are stored in a **User List** table. The table includes a record for each user

Matching your search criteria, records are sequenced based on the option selected in the Last Name/User ID Query portion of the search page. For example, if the **User ID** option is selected, records are sorted alphabetically, according to user ID.

3.2.2.2   By Users

The results of the search **By Users** (done through Last Name/User ID Query, Region Query or Alphabetical List Query) appears on the **Search Results page** as shown below.

3.2.2.3   Search Results Sort Capability

For both By Roles and By Users, sort capabilities are provided in the Search Result page by ascending or descending order of User ID, First Name, Last Name and Code (Division Code, HUB, Field Office, PHA). Use the **Sort Icons** (triangle) as shown on the screen appearing with the column to change the order in which information appears. Clicking the top triangle sorts the data so that it appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

The sort applies to the entire search results table, instead of sorting just on the records displayed on the page.

3.2.2.4 Search Results Pagination

The report has the Pagination capability. Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Also the links to Previous Group and First Page are also provided.
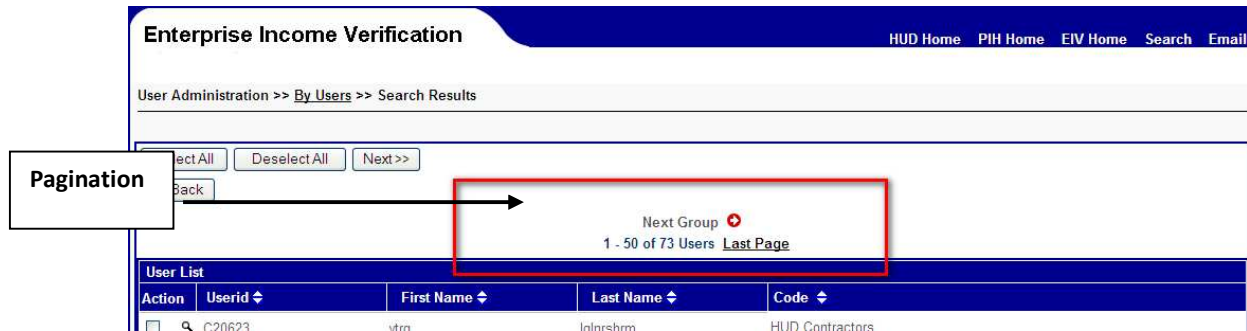
3.3 User Administration

Use the information in this section to help you carry out your user administration activities. It includes the following step-by-step instructions:

▪ Assign a role to a User
▪ Assign Development(s) to a User Profile
▪ Remove a Role from a User's Profile

3.3.1 User Administration – Individual User

3.3.1.1 Assign a role to a User

When seeking to assign or remove a role to a user, you may search using either the **By Users** or **By Roles** as described in Section 3.2.1.

Search results By Users and By Roles are described in Section 3.2.2.

Sample search result pages are shown below:

Search Results – By Users

Search Results – By Roles

Each record in the list includes some, or all of the following components:

▪ **Action** – Use this column when you want to apply an action to the associated record. Available action options vary based on the search criteria, include the following:

▪ **Checkbox** – The appearance of a checkbox in the Action column indicates that the record can be selected for inclusion in another action. It works in combination with another command on the page, e.g., Add, Continue, Next, etc.

▪ Click the checkbox to select it. A check mark in the checkbox indicates it is selected. For example, click the checkbox and then click the **Add** button to add the selected user to the role.

▪ **Update** (🔍) – The appearance of the magnifying glass tool in the Action column indicates that you can update user role information.

- **Update Developments (🖉)** – The Pencil tool will appear only for the PHA Occupancy - Public Housing Role, as each Public Housing has a set of developments. The appearance of this tool indicates that you can update the user developments information.

- **User Id** – Identifies the user's identification number as provided by the WASS system.

- **First Name** – Provides the user's name as it appears in the WASS system.

- **Last Name** – Provides the user's name as it appears in the WASS system.

- **Code/Division** – Identifies the Division/PHA code to which the user is assigned.

- **Current Status** – Displays the status of the user, as in Approved/Denied/Pending/Certified etc.

  Click the Action checkbox adjacent to the user you wish to include in the role. A checkmark in the checkbox indicates that it is selected. You can add one, several, or all of the available users at the same time. When you have made your selections, click **Add** or **Request** (if you are a PHA-level user administrator) to submit your request. The system processes your request and responds as follows:

- If you are adding these users to any role through **By Roles** (except PHA Occupancy – Public Housing), a message confirms the number of users added to the role, and you are returned to the **Security Levels List** page as shown below.

- If you are adding these users to any role through **By Roles** (except PHA Occupancy – Public Housing), a message confirms the number of users added to the role, and you are returned to the **Security Levels List** page as shown below.

- If you are adding these users to any role through By Users (except PHA Occupancy – Public Housing), the User Profile Details page is displayed as shown below.

Use the **User Profile Details** page make changes to the user's profile.

- ✓ Select the Action checkbox for the role or roles to be added to this user's profile or
- ✓ Deselect the Action checkboxes for a role or roles to be *removed* from this user's profile.
- ✓ Verify that the roles selected are valid. Duplicate role assignments are no longer allowed. Role assignment validations are described in the section 3.3.1.2 below.
- ✓ Click **Update**.

The system restores the page, displaying a message indicating the change was successfully implemented.

3.3.1.2   Duplicate Role Assignment Validations

Validations are applied to user roles based on their security level. Listed below are the validations pertaining to HUB, FO and PHA security levels.

3.3.1.2.1   HUB Role Validations

- • If user is assigned 'HUB User Administrator' role, they cannot be assigned 'HUB Security Administrator' role and vice versa. If an attempt is made to assign both the roles mentioned above, the system gives the following error. "**User may not be assigned the User Administrator and Security Administrator role. Choose one of the two roles**"

3.3.1.2.2   FO Role Validations

- If user is assigned 'FO User Administrator' role, they cannot be assigned 'FO Security Administrator' role and vice versa. . If an attempt is made to assign both the roles mentioned above, the system gives the following error. "**User may not be assigned the User Administrator and Security Administrator role. Choose one of the two roles**"

3.3.1.2.3 PHA Role Validations

- If user selects 'PHA Occupancy - Application Processor' role, the system prevents them from selecting the following roles and vice versa.
  - o PHA Occupancy – Public Housing
  - o PHA Occupancy – Voucher
  - o PHA Security Administrator
  - o PHA User Administrator

  The system throws the following error message if the conflicting roles are selected.
  "**User is not authorized for the following roles along with PHA Occupancy - Application Processor Role:**
  PHA Occupancy - Public Housing
  PHA Occupancy - Voucher
  PHA Security Administrator
  PHA User Administrator"

- If user selects 'PHA User Administrator or PHA Security Administrator role and the number of units in the PHA are greater than 250, the system prevents from selecting both the roles. For smaller PHA's i.e., less than 250 units in the PHA, the System will allow the user to be assigned both PHA User Administrator and PHA Security Administrator roles.

3.3.1.3 Assign Development(s) to a User Profile

At the PHA security level, you can control access to tenant data at the role level. Limit the user's access to income data by designating the development(s) that can be accessed. Because PHA Occupancy – Public Housing is a role, the best route to assign development(s) is by using the By Roles option. The PHA level has four possible roles: PHA Occupancy– Public Housing, PHA Occupancy – Voucher, and Security Administration. Developments may only be assigned to PHA Occupancy – Public Housing.

If you are adding a user(s) to the PHA Occupancy – Public Housing role through **By Roles or By Users**, the Assign Developments to User page is displayed as shown below. This has been created to facilitate the assignment of individual or groups of housing developments to staff members of large PHA's where it is not possible for one staff member to cover them all. **Select All** and **Deselect** buttons are available in the User Administration - By Roles or By Users Assign Developments option, which is shown in the Assign Developments screen as shown below.

Check the development to be assigned to the user and click the **Assign** button. Once the button is clicked, a message confirms the number of users added to the role, and you are returned to the **Security Levels List** page as shown below.

User Administration >> By Roles

2 users successfully added to HUB:HUB Security Administrator

Security Level: HQ - HUD Headquarters		
Actions	**Role**	**Users**
🖳 🔍 🌐	DCG	0
🖳 🔍 🌐	HQ Field Operations	1
🖳 🔍 🌐	HQ OIG	162

▪ If you are adding these users to any role through **By Roles** (except PHA Occupancy – Public Housing), a message confirms the number of users added to the role, and you are returned to the **Security Levels List** page as shown below.

To assign a development to an individual PHA user through **By User**, complete the following steps:

Click the **Update User Roles** tool (🔍) adjacent to the PHA user to whom you wish to assign a development. The **User Profile Details** page as shown below is displayed.

Click on the "View/Update User Developments" icon (🖊) against the **PHA Occupancy – Public Housing** Role for the user.

The **Assign Developments to User** page appears as shown below. Use this page to control the user's access to tenant income data. You can select one, several, or all of the available developments, depending on your requirements. You must select at least one development; otherwise the user will not have access to any tenant income data.

Click the checkbox next to the desired development or developments, and then click **Update**. The system processes your request and returns you to the **User Profile Details** page.

Selected User Information		
Userid	**Name**	**Code**
M65801	Jay McInerney	AK001

[Select All] [Deselect All] [Update]

List of Projects	
Action	**Projects**
☑	AK001000199 Demo/Dispo Buildings
☑	AK001000213 Wrangell
☑	AK001000216 Cordova

3.3.2 Remove a Role from a User's Profile

Complete the following steps to remove a role from a user's profile:

- Click the <u>By Users</u> link on the left-side navigation panel.

- Perform user search as described in Section 3.2.1

- Choose a user from the Search Result

- Click the View/Remove Users icon (🔍) on the selected user and the user profile is displayed.

- To remove a role, uncheck the role and then click update. If you want to remove all roles, click Revoke All.

3.3.3 User Administration – Group of Users

Many of the user administration features available for individual users are also available for groups of multiple users, including the following:

- Search for a Group of Users

- Modify Roles Assigned to a Group of Users

3.3.3.1 Search for a Group of Users

It is important to understand that in order to administer a set of users as a group, they must all be at the same security level. This section describes the process of conducting a search to return a list of users.

To search for and select a group of users in order to add a role or roles, remove a role or roles, or revoke system privileges, complete the following steps:

Click <u>By Users</u> in the left-side navigation panel.

The **Search Users by Region** page appears as described in 3.2.1.2.

3.3.3.2 Modify Roles Assigned to a Group of Users

Use the **Search Users by Region** page to help you locate the user you want to add to the selected role. The page offers you several ways to do that, construct a search query, or view an

alphabetized list of users. Your search will be limited to those users your role allows you to view. If you need assistance constructing a search query, refer to Section 3.2.1.

Once you have defined your search criteria, click **Search Users**.

The results display on the **Search Results – Users by Region** page as described in Section 3.2.2.

Use the **Search Results – Users by Region** page to help you carry out your user administration activities, at a group level. The **User List** table can be sorted on User ID, Name, and Code/Division.

Click the Action checkbox for one or more users to whom you want to assign the same role or roles.

If you want to assign the same role or roles to all users in the search results, click **Select All.** If you have selected some or all users in the list and want to deselect all selections, click **Deselect All** and make your selections again. Once your selections are made, click **Next >>**.

The **User Profile Details** page appears, identifying the selected users.

Confirm the **List of Selected Users**. If you made an error in selection, click **<<Back** to return to the previous page and correct your selections.

Continue to the next section to add or remove roles for the selected group, or revoke all system rights for the selected group.

3.3.4 Protection of HUD ID Information

In order to forestall possible abuse of the EIV system, HUD ID's should be protected from inadvertent disclosure. Although user administration information is not covered by the Privacy Act, because e-mail is not secure, in order to avoid theft of HUD ID's, information linking a HUD ID to the user's name should not be placed in the body of an e-mail or in an unencrypted attachment. For information about available encryption software, please refer to the EIV PIH User Manual.

3.3.5 Download Excel Report

User Administrators have the ability to download a Microsoft Excel report that gives statistics related to the number of Users having a selected Security Level role. This is available through the Download Excel Report feature.

To download the report, follow these steps:

- ✓ Click *By Roles* in the left-side navigation panel available to Public Housing program users

- ✓ Click the *Download Excel Report* icon ( ) appearing adjacent to the role record for which you wish to generate the Microsoft Excel Report.

- ✓ The system opens a **File Download** dialog box with **Open** and **Save** buttons. You can either click the **Open** or **Save** button.
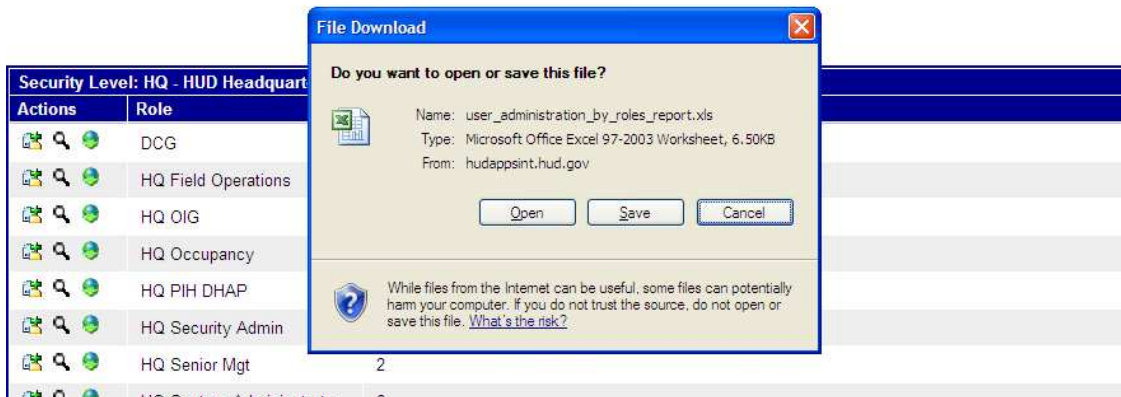
The user can choose to directly open the report or save it.

If the **Open** button is clicked, the Microsoft Excel is invoked, the Microsoft Excel spreadsheet with the list of users are displayed as shown below.

3.4   PHA Access Requests

3.4.1   Administer PHA Access Requests

User Administrators above the PHA level (i.e., HQ, HUB, FO) have the ability to approve the requests for user role assignments submitted by PHA User Administrators through the PHA Access Requests feature.

To administer PHA access request, follow these steps:

Click the *PHA Access Requests* link in the left-hand navigation panel

The system displays the PHA Selection page as shown below. The user can choose to view access requests for All PHA's (default selection) or for a single PHA.

When the **View Access Requests** button is clicked, the system displays the **PHA User Request List** page as shown below for the PHA selected, or for All PHA's.

	Role	User ID	First Name	Last Name	Participant Code	Request Id	Request Date
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MAV154	Adeyemi	Onikeku	MA003	MW9189	2011-05-03 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MQ8272	Janet	Blair	PA045	MG8344	2011-05-04 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MQ8272	Janet	Blair	PA045	MG8344	2011-05-04 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MGG024	Judy	Tollan	PA045	MG8344	2011-05-04 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MGG024	Judy	Tollan	PA045	MG8344	2011-05-04 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MH1712	Rene	Janco	PA045	MG8344	2011-05-04 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MN7714	Ellen	Goff	MD004	MN7714	2011-05-05 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Voucher	MJI804	Michaelle	Saintfort	MA003	MW9189	2011-05-05 1
*A ○ **D ○ ***N ◉	Program Administrator - Public Housing	MQ5101	James	Musick	VA002	MI1616	2011-05-05 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MEV680	Jason	Lockard	PA001	MN0151	2011-05-05 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MR4818	JESSICA	SHIVONE	PA024	MA2924	2011-05-06 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MKE549	Natasha	Robertson	GA006	MT3550	2011-05-06 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Voucher	MKE549	Natasha	Robertson	GA006	MT3550	2011-05-06 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MKG831	Hedy	Allen-Jones	GA006	MT3550	2011-05-06 1
*A ○ **D ○ ***N ◉	PHA DHAP Assistance	MR1474	Carmen	Estrada	MA008	MR1474	2011-05-09 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MR1474	Carmen	Estrada	MA008	MR1474	2011-05-09 1
*A ○ **D ○ ***N ◉	Program Administrator - Public Housing	MCD342	Willie	Thomas	MA078	MM9550	2011-05-10 0
*A ○ **D ○ ***N ◉	PHA DHAP Assistance	MQ0408	Roberta	Winger	PA056	MQ0408	2011-05-10 1
*A ○ **D ○ ***N ◉	PHA Security Administrator	MQ0408	Roberta	Winger	PA056	MQ0408	2011-05-10 1
*A ○ **D ○ ***N ◉	Program Administrator - Voucher	MQ0408	Roberta	Winger	PA056	MQ0408	2011-05-10 1
*A ○ **D ○ ***N ◉	Program Administrator - Public Housing	MQ0408	Roberta	Winger	PA056	MQ0408	2011-05-10 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Application Processor	MQ0408	Roberta	Winger	PA056	MQ0408	2011-05-10 1
*A ○ **D ○ ***N ◉	Program Administrator - Public Housing	M82997	Barbara	O'Neal	GA232	M82997	2011-05-10 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MKD928	MARCHELLE	MOORE	GA004	M50283	2011-05-10 1
*A ○ **D ○ ***N ◉	PHA Occupancy - Public Housing	MKF202	TONI	MAYES	GA004	M50283	2011-05-10 1

[Update Action]

Update Action button

Next Group ➡

1 - 50 of 543 Requests Last Page

*A=Approve |**D=Deny |***N=No Action

The report has the Pagination capability. Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Also the links to Previous Group and First Page are also provided.

Sort capability is available for Role, User ID, First Name, Last Name, Participant Code, Request Id and Request Date fields. Use the **Sort Icons** (triangle) as illustrated above. Clicking the top triangle sorts the data so that it appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

To administer PHA access request:

Select *A (to **Approve** the request) radio button, **D (to **Deny** the request) request or ***N (for **No** action) under the Actions column for each user under request in the table. The ***N radio button is defaulted for all users when the page is displayed.

Click the **Update Action** button

The system displays the **PHA User Request List Results** page showing a summary of the requests that were approved or denied.

To access requests that have not been processed (approved or denied) on the previous **PHA User Request List** page, click the **Access Request** button and the system will re-display the **PHA User Request List** page.

3.4.2 System Cancels Old PHA Access Requests

Nightly, a batch job runs and cancels all outstanding PHA access requests that are more than 90 days old.

3.4.3 PHA Access Requests Report

The PHA Access Requests Report provides the user administrators with statistics on PHA user access requested and acted upon for the current calendar quarter. This report can be accessed by clicking the 'PHA Access Requests Report' under 'User Administration' from the left side navigation panel.

✓ The PHA Access Requests Report may be viewed at the HUD HQ, State, HUB, FO, TARC or PHA level by selecting the appropriate *Region* button, then selecting the required *Area* within the selected region and finally clicking the *Get Report* button.

✓ A printer-friendly version of the HUD HQ, State, HUB, FO, TARC or PHA Level **PHA Access Requests Report** can be obtained by clicking the **Printer-friendly version** link on the report page.

✓ User Administrators also have the ability to download the report by clicking on the **Download to Excel** link on the report page of the HUB HQ, State, HUB, FO, TARC or PHA Levels.

- When the link is clicked, the system opens a **File Download** dialog box with **Open** and **Save** buttons. You can either click the **Open** or **Save** button.

If the **Open** button is clicked, the program is invoked to produce a spreadsheet in Microsoft Excel format displaying PHA Access Requests Report.

If the **Save** button is clicked, a **Save As** dialog box that would allow you to enter the filename and save the spreadsheet in your local drive.

3.5   Administer HUB Users

EIV uses organizational information from PIC. However, EIV allows users to be assigned to the HUB level whereas PIC does not. That necessitates a special process to administer EIV HUD users.

This functionality is only available to HQ Users.

To administer HUB users, follow these steps:

1. Click the link *Administer HUB Users* in the left-hand navigation panel for Public Housing program users

The system displays the **HUB List** page as shown below.

The **Administer HUB Users** page contains HUB Number, HUB Name, and User Count, which refer to the number of users assigned to the HUB.

This page provides sort capability on the HUB Number, HUB Name and User Count fields. Use the **Sort Icons** (triangle) as illustrated above to change the sort order of the users. Clicking the top triangle sorts the data so that it appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

The Action column includes the following tools:

	Add Users to HUB icon: Used to add users to HUB security level
	List/Remove Users from HUB tool: Used to remove users from the HUB security level

To add a user to a HUB, click the **Add Users to HUB** tool next to the HUB to which you want to add a user and the system will display the **HUB Users List** page with the list of available users to be added to the selected HUB. An example follows:

The **HUB User List** table includes record for each user in the selected HUB. The record detail includes the HUB's Organizational Name, User ID, and User Name.

This page provides sort capability on the Organization Name, User ID, User First Name and User Last Name fields. Use the **Sort Icons** (triangle) as illustrated above to change the sort order of the users. Clicking the top triangle sorts the data so that it appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

Click the checkbox for one or more user/HUB Organization combinations you want to assign and the click **Add**. The **HUB User List** page displays a confirmation message indicating that the users were successfully added to the HUB. The HUB User Count is updated to reflect the additions.

To remove a user from a HUB:

- ✓ Click the link <u>Administer HUB Users</u> in the left-hand navigation panel.
- ✓ The system displays the **HUB List** page.
- ✓ The **HUB List** table includes a record for each HUB. Records appear in ascending order according to their HUB Number value. Each record contains the HUB Number, HUB Name, and User Count (refers to the number of users assigned to the HUB).

The Action column includes the following tools:

Icon	Description
	Add Users to HUB icon: Used to add users to HUB security level
	List/Remove Users from HUB icon: Used to remove users from HUB security level

Click the **List/Remove Users from HUB** tool ( ).

The system displays the **HUB Users** page as shown below.

Enterprise Income Verification   HUD Home   PIH Home   EIV Home   Sear

User Administration >> <u>Administer HUB Users</u> >> HUB User List

The following Users are currently in HUB: 1HBOS Boston Hub:

Remove

HUB User List

Action	Organization Name ⬍	User ID ⬍	User First Name ⬍	User Last Name ⬍
☐	1APH BOSTON HUB OFFICE	H01680	Valarie	Francis
☐	1APH BOSTON HUB OFFICE	H01965	Kathleen	Lima
☐	1APH BOSTON HUB OFFICE	H05101	Robert	Cwieka
☐	1APH BOSTON HUB OFFICE	H05501	Judith	Smith
☐	1APH BOSTON HUB OFFICE	H05659	Ernest	Blanchette, Jr.
☐	1APH BOSTON HUB OFFICE	H06983	Teresa	Smith
☐	1EPH HARTFORD PROGRAM CENTER	H07143	Marisol	Ortiz

On the HUB User List:

- ✓ Click the checkbox that corresponds to each user you want to remove from the HUB

- ✓ Click the **Remove** button

- ✓ The **HUB List** page displays a confirmation message indicating that the users were successfully removed from the HUB. The HUB User Count is updated to reflect the change.

3.6   User Maintenance

User Administrators can update the **Expiration date** of EIV Public Housing program users through the User Maintenance feature. The default value is 30 days after the start of the quarter.

To certify users, follow these steps:

Click the _User Maintenance_ link in the left-hand navigation panel available for Public Housing program users.

The system displays the **User Administration - User Maintenance** page as shown below with the **Search User by User ID** section.

✓ Enter the User ID and click the **Get User Information** button

✓ The **User Details** page is displayed with a textbox to update the **Expiration Date**

✓ The **User Details** page is displayed with User Expiration History report, which will display the history of the specified user's expiration history.

✓ Enter a valid date in the **Expiration Date in the format (mm/dd/yyyy)**: textbox. The date should be within the current quarter plus 1 month (e.g., If today's date is 10/15/2009, the

Expiration date cannot be a date after 01/31/2010 since 12/31/2009 is the current quarter end date)

✓ Select a **Reason for User Expiration** from the provided list of reasons. The provided list of reasons are:

   o Change of duties; access no longer required

   o Terminated Employee

   o Noncompliant with security requirements

✓ Click the **Update** button.

✓ The system updates the User Expiration Date and refreshes the User Details page with the message **User Expiration successfully updated** on the top.

✓ The system updates the User Expiration History section for the user at the second half of the page as shown in the screen shot below.

3.7 User Termination Report

To view the User Termination Report (Only for HQ User Administrators), follow these steps:

- Click the User Termination Report under the _User Administration in_ the left-hand navigation panel available for HQ User Administrators.

The system displays the **User Termination Report** as shown below.

Type in a date or click the **Calendar link** ( ) and enter a date in the **Start Date and End Date** textboxes. Click the **Get Report** button.

The system displays the **User Termination Report** page with the Users' who has expiration date set within the specified **Start Date** and **End Date**.

The report provides sort capability on the **User ID, User First Name, User Last Name, Termination Date (Expiration Date)** and Reason Code fields. Use the **Sort Icons** (triangle) as illustrated above. Clicking the top triangle sorts the data so that it appears in ascending order (A

to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

3.8   User Certification

User Administrators can certify EIV users following these certification rules:

- User Administrators cannot certify themselves except for HQ User Administrators. HQ User Administrators are asked to certify each other.
- A HQ User Administrator can certify any user below his/her organizational level (e.g., HQ UA can certify HUB, FO and PHA).
- Non-HQ User Administrators can only certify User Administrators at or below his/her organizational level (e.g., HUB UA's can only certify HUB UA's, FO UA's and PHA UA's).

3.8.1   HQ, HUB and FO Users

As HQ, HUB or FO user administrator, follow these steps to perform the user certification process:

- ✓ Click the *User Certification* link in the left-hand navigation panel available for Public Housing program users

- ✓ The system displays the **User Certification Selection** page as shown below. Depending on the security level assigned, the user administer can select region from the region selection, The User Administrator can select users (all users, users pending certification or certified users) from the respective security level only. Please note that the Program Type selection does not apply to HQ, HUB or FO users.

HQ User page

HUB User page

○	HUB	All
○	FO	All
○	TARC	All
○	PHA	All
	* Select Program Type:	All PIH Programs
	* Note: Only applicable to PHA	
	Select Certification Status:	All

[List Users]

FO User page

○	FO	All
○	TARC	All
○	PHA	All
	* Select Program Type:	All PIH Programs
	* Note: Only applicable to PHA	
	Select Certification Status:	All

[List Users]

You can select any value (All, Pending Certification, or Certified Only) from the Select Certification Status dropdown and click the **List Users** button.

The system displays the **User Administration Selection - User Certification** page as shown below, with the **List of Users and their Roles** section showing the User Name, User ID, Last Certification Date and Certify User (button) or Certified User (status) for each user meeting the selection criteria.

Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Links to Previous Group and First Page are also provided.

For users that are pending certification, a **Certify User** button is displayed. Select a user and click on the **Certify User** button against the selected user (e.g., User ID: jdoe) to **Certify** the User.

When the **Certify User** button is clicked, the system refreshes the **User Administration - User Certification** page as shown below, with the List of Users and their Roles section. The selected user now shows as a **Certified User**.

3.8.2 PHA User

As PHA user, follow these steps to perform the user certification process:

✓ Click the _User Certification_ link in the left-hand navigation panel available for Public Housing program users

✓ The system displays the **User Certification Selection** page as shown below.

✓ From the User Certification Selection page:

✓ Select a value from the PHA drop-down list

✓ Select a value from the Program Type drop-down list. The PHA user administrator is given the option to choose Program Type (i.e., All PIH Programs, Public Housing, Section) when doing the user certification. When **All PIH Programs** is selected from the Program Type drop-down list, it will list all the users within the PHA regardless of the role assigned. When **Public Housing** is selected from the Program Type drop-down list, it will list all the users with PHA Occupancy Specialist – Public Housing role. When **Section 8** is selected from the Program Type drop-down list, it will list all the users with PHA Occupancy Specialist – Voucher role.

Select any value (All, Pending Certification, or Certified Only) from the Select Certification Status dropdown and click the **List Users** button.

The system displays the **User Certification Selection - User Certification** page as shown below, with the **List of Users and their Roles** section, with the User Name, User ID, Last Certification Date and Certify User (button) or Certified User (status) for the selected criteria.

Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Also the links to Previous Group and First Page are also provided.

For users that are pending certification, a **Certify User** button is displayed. Select a user and click on the **Certify User** button against the selected user (e.g., User ID: SS00333) to **Certify** the User.

When the **Certify User** button is clicked, the system refreshes the **User Administration - User Certification** page as shown below, with the List of Users and their Roles section. The selected user now shows as a Certified User.

The system refreshes the **User Certification Selection - User Certification** page as shown below, with the List of Users and their Roles section. The selected user now shows as a **Certified User**.

3.9 User Certification Report

User Administrators can view a list of **All** users, **Certified Only** users**,** Users with **Pending Certification and** Users with **Expired** roles using the User Certification Report. The user can view Users at their Security Level and lower. e.g., **HUB** Users can view Certified Users and Users Pending Certification from **HUB, FO** and **PHA** Security levels but not **HQ users.**

3.9.1 HQ, HUB and FO User

As HQ, HUB or FO user, follow these steps to generate the User Certification Report,

  ✓ Click the *User Certification Report* link in the left-hand navigation panel.

✓ The system displays the **User Certification Report Selection** page as shown below. The user can select Users Pending Certification from the respective Security Level only.

✓ The User Certification Selection page for a HUB HQ User appears as shown below.

✓ The User Certification Selection page for a HUB User appears as shown below.

✓ The User Certification Selection page for a FO User appears as shown below.

✓ From the User Certification Report Selection page:

✓ Select a region (FO or PHA) and a value from the corresponding drop-down list. Please note that the Program Type selection is only applicable to PHA region.

Select any value (All, Pending Certification, or Certified Only) from the Select Certification Status dropdown and click the **List Users** button.

✓ After you make a selection, click the **List Users** button

The system displays the **User Certification Report Selection - User Certification** page as shown below, with the **List of Users and their Roles** section, with the User Name, User ID, Expiry Date, Last Certification Date and Certify User (button) or Certified User (status) for the selected criteria.

Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Also the links to Previous Group and First Page are also provided.

A printer-friendly version of the **User Certification Report** can be obtained by clicking the **Printer-friendly version** link on this report.

User Administrators also have the ability to download the User Certification Report by clicking on the **Download in Excel** link as illustrated above.

When the link is clicked, the system opens a **File Download** dialog box with **Open** and **Save** buttons. You can either click the **Open** or **Save** button.

✓ The user can choose to directly open the report or save it.

✓ If the **Open** button is clicked, the Microsoft Excel is invoked, the Microsoft Excel spreadsheet with the list of users with the certification information are displayed as shown below.

	A	B	C	D	E	F	G	H	I
1	Field Office:	All							
2	Program Type	All PIH Programs							
3	Number of Users	2							
4	Certification Status	All							
5									
6	User Name	User ID	Region Code	Expiry Date	Last Certification Date	Status	FO Occupancy Specialist	FO Security Admininstrator	FO User Administrator
7	SSOH15 LAST - EIV	HEIV15	2APH NEW YORK CITY HUB OFFICE	N/A	N/A	Pending Certification	Yes	No	Yes
8	zgrmzB hvmID	H01086	4EPH COLUMBIA PROGRAM CENTER	N/A	N/A	Pending Certification	Yes	No	Yes
9	Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.								
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									

✓ If the **Save** button is clicked, the Save As pop-up screen as shown is displayed that will allow you to save the excel spreadsheet to your local machine.

Enterprise Income Verification   HUD Home   PIH Home   EIV Home   Sea

User Administration >> User Certification Report Selection >> User Certification Report

HUD HQ   Number of Users: 217   Certification Status: All ▼   Change View

Printer-Frien
Downlo
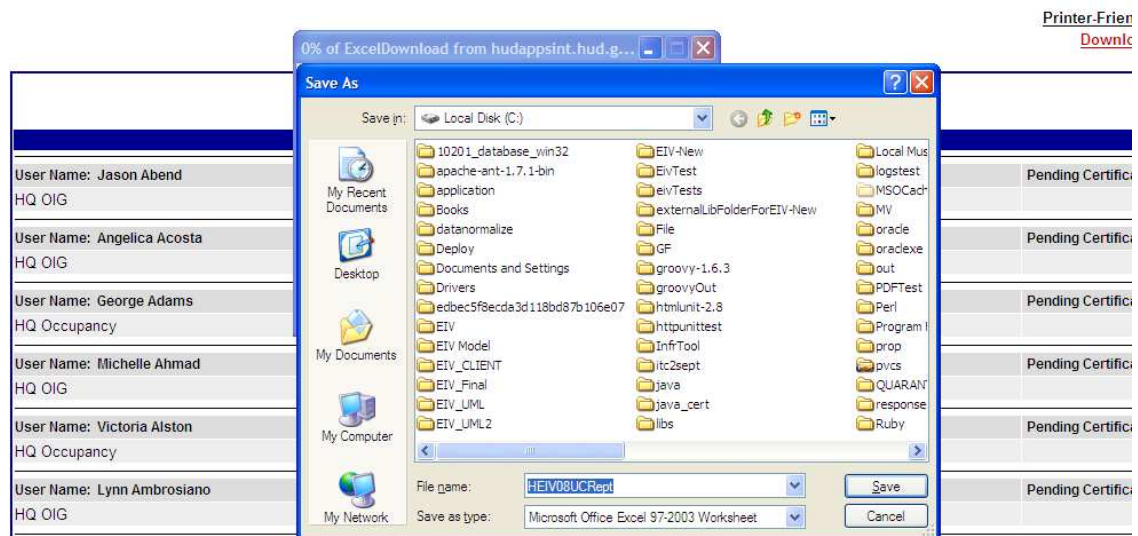
3.9.2 PHA User

As a PHA user, please follow these steps to perform generate the User Certification Report:

Click the *User Certification Report* link in the left-hand navigation panel available for Public Housing program users

The system displays the **User Certification Report Selection** page as shown below.

From the User Certification Report Selection page:

✓ Select a value from the PHA drop-down list

✓ Select a value from the Program Type drop-down list. The PHA user administrator is given the option to choose Program Type (i.e., All PIH Programs, Public Housing, or Section 8) when doing the user certification. When All PIH Programs is selected from the Program Type drop-down list, it will list all the users within the PHA regardless of the role assigned. When Public Housing is selected from the Program Type drop-down list, it

will list all the users with PHA Occupancy Specialist – Public Housing role. When Section 8 is selected from the Program Type drop-down list, it will list all the users with PHA Occupancy Specialist – Voucher role.

✓ Select any value (All, Pending Certification, Certified Only, or Expired Only) from the Select Certification Status dropdown.

✓ After making the selection, click the **List Users** button.

✓ The system displays the User Certification Report Selection - User Certification Report page as shown below, with the List of Users and their Roles section, with the User Name, User ID, Expiry Date, Last Certification Date and Certify User (button) or Certified User (status) for the selected criteria.

Results are displayed in the group of 50 records per page. If the search results fetch more than 50 records, links to Next Group of 50 records and Last Page are provided. Also the links to Previous Group and First Page are also provided.

A printer-friendly version of the **User Certification Report** can be obtained by clicking the **Printer-friendly version** link on this page.
User Administrators also have the ability to download the User Certification Report by clicking on the Download in Excel link as illustrated above.

When the link is clicked, the system opens a **File Download** dialog box with **Open, Save, Cancel** or **More Info** buttons. You can either click the **Open** or **Save** button.

Enterprise Income Verification

HUD Home   PIH Home   EIV Hom

User Administration >> User Certification Report Selection >> User Certification Report

PHA: TX001 Austin   Number of Users: 60   Program Type: All PIH Programs ▾   Certification Status: All ▾

Print

File Download

Do you want to open or save this file?

Name: HEIV08UCRept.xls
Type: Microsoft Office Excel 97-2003 Worksheet
From: hudappsint.hud.gov

[Open]   [Save]   [Cancel]

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

User Name: RACHEL AGUILAR	Us		st Certification Date: 04/01/2011	Certified User
PHA Occupancy - Voucher				
User Name: LILLIAN ALMANAZA	Us		st Certification Date: 04/01/2011	Certified User
PHA Occupancy - Voucher				
User Name: Angelica Aguilar	Us		st Certification Date: 04/01/2011	Certified User
PHA Occupancy - Voucher	PI	Voucher	ogram Administrator - Public Housing	
User Name: Jeff Amador	User ID: MFD781	Expiry Date: N/A	Last Certification Date: 04/01/2011	Certified User
PHA Occupancy - Voucher				
User Name: TRAVIS BAILEY	User ID: MAN078	Expiry Date: N/A	Last Certification Date: 04/04/2011	Certified User
PHA Occupancy - Public Housing				
User Name: ANALICIA BAZAN	User ID: MAF199	Expiry Date: N/A	Last Certification Date: 04/01/2011	Certified User
PHA Occupancy - Voucher				

If the **Open** button is clicked, the Microsoft Excel is invoked, the Microsoft Excel spreadsheet with the list of users with the certification information is displayed as shown below.

PHA:	All													
Program Type	All PIH Programs													
Number of Users	111													
Certification Status	All													

User Name	User ID	Region Code	Expiry Date	Last Certification Date	Status	PHA DHAP Assistance	PHA Occupancy - Application Processor	PHA Occupancy - Public Housing	PHA Occupancy - Voucher	PHA Security Administrator	PHA User Administrator	Program Administrator - Public Housing	Program Administrator - Voucher
yggvmzixD bvmzouJ	MU5452	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
kurmmD bvohnzF	MU3958	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
bnM bvorF	MU4503	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
msiD gglAxJ	MC8478	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
zsgizA ggvsxmzoL	MU3959	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
wobivsU hloleU	MU7612	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
kurmmD hooxA	MU5777	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
szmmzsK hrolX	MU4920	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
zxrmM hvghl	MAS734	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	No	No	No
wrazJ hzizC	MU3545	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
bnivD ivC	MJA353	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
bxzB ivonnU	MU3949	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
vmzol ivoalF	MU4632	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
zrizA mfzyuJ	MU3505	AK001	N/A	N/A	Pending Certification	No	No	No	No	Yes	Yes	No	No
zrsgmbK mihmzF	M64374	AK001	N/A	N/A	Certified User	No	No	No	No	No	Yes	No	No

If the **Save** button is clicked, the **Save As** pop-up screen as shown below is displayed that will allow you to save the excel spreadsheet to your local machine.

3.10 User Role History Report

The User Role History Report provides two options:

- **By User** – allows viewing of the role assignment history for any user.

- **By User Administrator** – allows the viewing of role assignment activities performed by the user administrator. User Role History Report - By User.

To view the User Role History Report – By User, follow these steps:

- Click the _By User_ link under the _User Role History Report_ in the left-hand navigation panel available for Public Housing User Administrators and Security Administrators.

The system displays the **User Role History Report – By User** page as shown below.

Enterprise Income Verification

HUD Home   PIH Home   EIV Home

User Administration >> User Role History Report - By User

Specify the User ID, Start and End dates to check the Role Assignment history for the User. Specify date in the format (MM/DD/YYYY) or select by clicking on the

* User ID

* Start Date

* End Date   Get Report

Note: The fields marked with * (asterisk) are mandatory.

Enter the **User ID**. Type in a date or click the **Calendar link** (   ) and enter a date in the **Start Date and End Date** textboxes. Click the **Get Report** button.

Note: The Start Date must be within 30 days from the End Date.

The system displays the **User Role History Report – By User** page with the selected Users' Role History within the specified **Start Date** and **End Date**.

Enterprise Income Verification

HUD Home   PIH Home   EIV Home   Searc

User Administration >> User Role History Report - By User

Specify the User ID, Start and End dates to check the Role Assignment history for the User. Specify date in the format (MM/DD/YYYY) or select by clicking on the calenda

* User ID   HEIV08

* Start Date   10/01/2011

* End Date   10/17/2011   Get Report

Note: The fields marked with * (asterisk) are mandatory.

User ID: HEIV08   User Name: SSOH08 LAST - EIV

1 - 2 of 2 Role Actions

Role	Action	Participant Code	Updated By User Id ⬍	Updated By User Name	Update Date ⬍
HQ System Admininstrator	Approved	NA	C07753	Indranil Sen	2005-05-10 09:10:30 a
HQ PIH DHAP	Approved	NA	HEIV08	SSOH08 LAST - EIV	2011-17-10 01:10:07 p

1 - 2 of 2 Role Actions

The report provides sort capability on the **Updated By User ID** and **Update Date** fields. Use the **Sort Icons** (triangle) as illustrated above. Clicking the top triangle sorts the data so that it

appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

3.10.1 User Role History Report - By User Administrator

To view the User Role History Report – By User Administrator, follow these steps:

Click the *By User Administrator* link under the *User Role History Report in* the left-hand navigation panel available for Public Housing User Administrators and Security Administrators.

The system displays the **User Administration History Report – By User Administrator** page as shown below.

- Enter the **User ID** of a **User Administrator**. Type in a date or click the **Calendar link** (⊞) and enter a date in the **Start Date and End Date** textboxes. Click the **Get Report** button.

  Note: The Start Date must be within 30 days from the End Date.

The system displays the **User Administration History Report – By User Administrator** page with the roles update performed by the selected User Administrator within the specified **Start Date** and **End Date**.

The report provides sort capability on the Updated User ID and Update Date fields. Use the Sort Icons (triangle) as illustrated above. Clicking the top triangle sorts the data so that it appears in ascending order (A to Z), while clicking the bottom triangle sorts the data so that it appears in descending order (Z to A).

3.11 PHA Usage Report

- ✓ The PHA Usage Report provides a list of PHA usage status (Yes, No) indicating that any user from the selected PHA has accessed EIV system within the last 30 days or within the last 180 days of the reporting date.

- ✓ A printer-friendly version of the HQ, HUB, FO, TARC and State Level **PHA Usage Reports** can be obtained by clicking the **Printer-friendly version** link on the report page.

- ✓ User Administrators also have the ability to download the report by clicking on the **Download in Excel** link on the report page for the HQ, HUB, FO, TARC and State Levels.

✓ When the link is clicked, the system opens a **File Download** dialog box with **Open** and **Save** buttons. You can either click the **Open** or **Save** button.

If the **Open** button is clicked, the program is invoked to produce a spreadsheet in Microsoft Excel format displaying PHA usage data as shown below.

If the **Save** button is clicked, a **Save As** dialog box that would allow you to enter the filename and save the spreadsheet in your local drive.
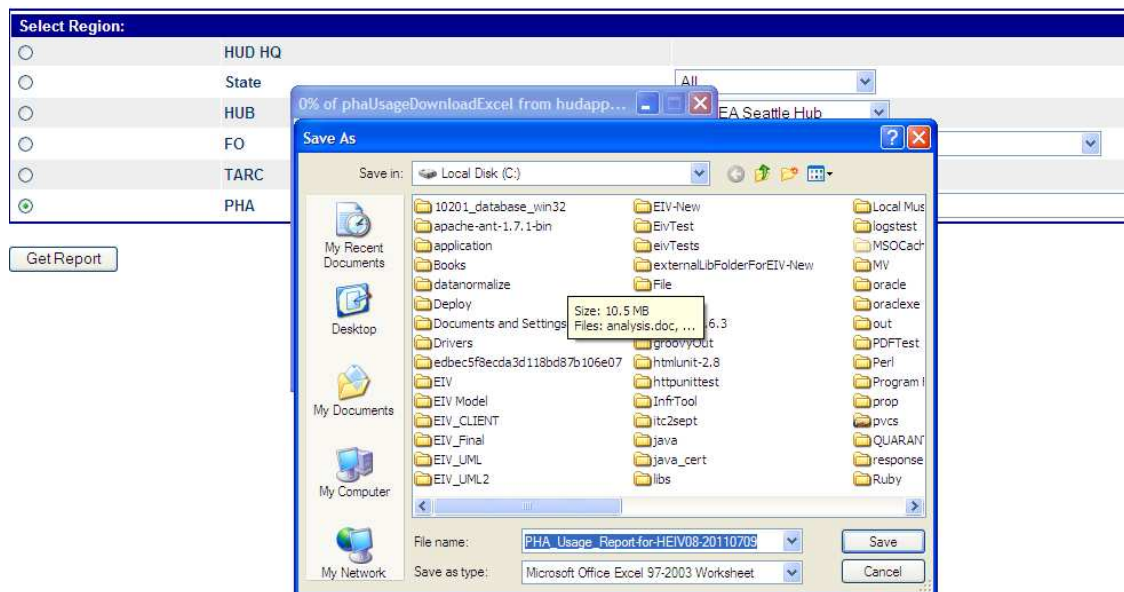
To view the PHA Usage Report, complete the following steps:

✓ Click the PHA Usage Report link available for Public Housing program User Administrators.

The system displays the **PHA Usage Selection** page as shown below.

The following report options are available:

- HUD HQ
- State
- HUB
- FO
- TARC
- PHA

3.11.1 HUD HQ Option

When HUD HQ radio button is selected, the HUD HQ PHA Usage Report is displayed as shown below.

Audit Reports >> PHA Usage Report Selection >> HQ Level PHA Usage Report

Download

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HQ Level PHA Usage Report as of 07/09/2011								
Hub Name	Total Number of PHAs	Number of PHAs with No Users	Number of PHAs with At least 1 User	% of PHAs with at least 1 User	Number of PHAs with EIV access in the last 30 days	% of PHAs with EIV access in last 30 days	Number of PHAs with EIV access in the last 180 days	% of PHAs with EIV access 180 days
10HSEA Seattle Hub	74	0	74	100.00%	67	90.54%	68	91.89%
11RPC Cleveland RPC	3	0	3	100.00%	3	100.00%	3	100.00%
1HBOS Boston Hub	269	0	269	100.00%	223	82.90%	254	94.42%
2HBUF Buffalo Hub	105	1	104	99.05%	95	90.48%	101	96.19%
2HNWK Newark Hub	108	1	107	99.07%	82	75.93%	103	95.37%
2HNYC New York City Hub	77	2	75	97.40%	56	72.73%	69	89.61%
3HBLT Baltimore Hub	114	1	113	99.12%	107	93.86%	111	97.37%
3HPHL Philadelphia Hub	58	0	58	100.00%	57	98.28%	58	100.00%
3HPIT Pittsburgh Hub	38	0	38	100.00%	37	97.37%	37	97.37%
4HATL Atlanta Hub	188	2	186	98.94%	110	58.51%	171	90.96%
4HBIR Birmingham Hub	147	0	147	100.00%	122	82.99%	145	98.64%
4HGRN Greensboro Hub	171	2	169	98.83%	146	85.38%	166	97.08%
4HJAC Jacksonville Hub	52	1	51	98.08%	42	80.77%	51	98.08%
4HJMS Jackson Hub	56	6	50	89.29%	38	67.86%	49	87.50%
4HLOU Louisville Hub	122	1	121	99.18%	88	72.13%	117	95.90%
4HMEM Memphis Hub	88	1	87	98.86%	73	82.95%	86	97.73%
4HMIA Miami Hub	59	2	57	96.61%	51	86.44%	52	88.14%

3.11.2 State Option

When State radio button is selected, the HUD HQ PHA Usage Report is displayed as shown below.

Enterprise Income Verification

HUD Home   PIH Home   EIV Home   Search

Audit Reports >> PHA Usage Report Selection >> All States PHA Usage Report

PHA Usage Report Summary as of 07/09/2011	
State	ALL
Total Number of PHAs	4092

Printer-Friendly Version link

Printer-Friendl

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Download

Download In Excel Link

PHA Usage Report for all States as of 07/09/2011								
State Name	Total Number of PHAs	Number of PHAs with No Users	Number of PHAs with At least 1 User	% of PHAs with at least 1 User	Number of PHAs with EIV access in last 30 days	% of PHAs with EIV access in last 30 days	Number of PHAs with EIV access in last 180 days	% of PHA EIV acce last 180
Alaska	2	0	2	100.00%	2	100.00%	2	100.00%
Alabama	147	0	147	100.00%	122	82.99%	145	98.64%
Arkansas	146	2	144	98.63%	107	73.29%	133	91.10%
Arizona	25	0	25	100.00%	21	84.00%	25	100.00%
California	114	5	109	95.61%	98	85.96%	107	93.86%
Colorado	66	0	66	100.00%	51	77.27%	62	93.94%
Connecticut	51	0	51	100.00%	40	78.43%	47	92.16%
District Of Columbia	2	0	2	100.00%	2	100.00%	2	100.00%
Delaware	6	0	6	100.00%	6	100.00%	6	100.00%
Florida	111	3	108	97.30%	93	83.78%	103	92.79%
Georgia	188	2	186	98.94%	110	58.51%	171	90.96%
Guam	2	0	2	100.00%	1	50.00%	2	100.00%
Hawaii	6	0	6	100.00%	6	100.00%	6	100.00%
Iowa	70	0	70	100.00%	51	72.86%	66	94.29%

3.11.3 HUB Option

Enterprise Income Verification

HUD Home   PIH Home   EIV Home   Search

Audit Reports >> PHA Usage Report Selection >> HUB Level PHA Usage Report

PHA Usage Report Summary as of 07/09/2011

HUB	10HSEA Seattle Hub
Total Number of PHAs	74

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HUB Level PHA Usage Report as of 07/09/2011								
Field Office Name ▲▼	Total Number of PHAs	Number of PHAs with No Users	Number of PHAs with At least 1 User	% of PHAs with at least 1 User	Number of PHAs with EIV access in last 30 days	% of PHAs with EIV access in last 30 days	Number of PHAs with EIV access in last 180 days	% of PHAs with EIV access in last 180
0APH SEATTLE HUB OFFICE	50	0	50	100.00%	43	86.00%	44	88.00%
0EPH PORTLAND PROGRAM CENTER	24	0	24	100.00%	24	100.00%	24	100.00%
Totals:	74	0	74	100.0%	67	90.54%	68	91.89%

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> **Printer-Friendly Version link**

> **Download In Excel link**

3.11.4 FO Option

Enterprise Income Verification

HUD Home   PIH Home   EIV Home   Search

Audit Reports >> PHA Usage Report Selection >> FO Level PHA Usage Report

PHA Usage Report Summary as of 07/09/2011

HUB	10HSEA Seattle Hub
Field Office	0APH SEATTLE HUB OFFICE
Total Number of PHAs	50

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FO Level PHA Usage Report as of 07/09/2011					
PHA Name ▲▼	Total PHA Occupancy - Public Housing Users ▲▼	Total PHA Occupancy - Voucher Users ▲▼	Total Unique PHA Occupancy (PH + Voucher) Users ▲▼	Accessed EIV in last ▲▼ 30 days	Accessed EIV 180 days
AK001 AHFC	38	7	39	Y	Y
AK901 AHFC - S8	3	39	39	Y	Y
ID001 Twin Falls	2	0	2	Y	Y
ID002 Nampa	4	0	4	Y	Y
ID005 Pocatello	3	4	4	Y	Y
ID010 Buhl	1	0	1	Y	Y
ID011 Jerome	3	0	3	Y	Y
ID012 American Falls	1	0	1	N	Y
ID013 Boise City	2	15	16	Y	Y
ID016 SICHA	6	10	10	Y	Y
ID020 IHFA	8	2	8	Y	Y
ID021 Ada County	2	15	16	Y	Y
ID901 IHFA - Sec 8	0	24	24	Y	Y
WA001 Seattle Housing Authority	81	54	117	Y	Y

> **Printer-Friendly Version link**

> **Download In Excel link**

3.11.5 PHA Option

This excel report now lists the following additional fields

- HUB Code
- HUB Name
- Executive Director Email Address
- Number of Public Housing Users
- Total Number of Users
- EIV Access within Last 90 days

3.12 HUD Usage Report

The HUD Usage Report provides a list of HUD Users' EIV usage status (Yes, No) indicating whether the user accessed EIV system within the last 30 days or within the last 180 days of the reporting date. For users with the Occupancy role, this report would indicate whether they have accessed the Income Discrepancy Report within the last 30 days or within the last 180 days of the reporting date.

✓ A printer-friendly version of **HUD Usage Reports** at all levels can be obtained by clicking the **Printer-friendly version** link on the report page.

✓ User Administrators also have the ability to download the report by clicking on the **Download in Excel** link on the report page for the HQ, HUB, FO and TARC Levels.

✓ A capability to download the report into Microsoft Excel format is provided if **ALL** option is selected for the HUB, TARC and FO levels.

✓ When the link is clicked, the system opens a **File Download** dialog box with **Open** and **Save** buttons. You can either click the **Open** or **Save** button.

If the **Open** button is clicked, the program is invoked to produce a spreadsheet in Microsoft Excel format displaying HUD usage data as shown below.

If the **Save** button is clicked, a **Save As** dialog box that would allow you to enter the filename and save the spreadsheet in your local drive.
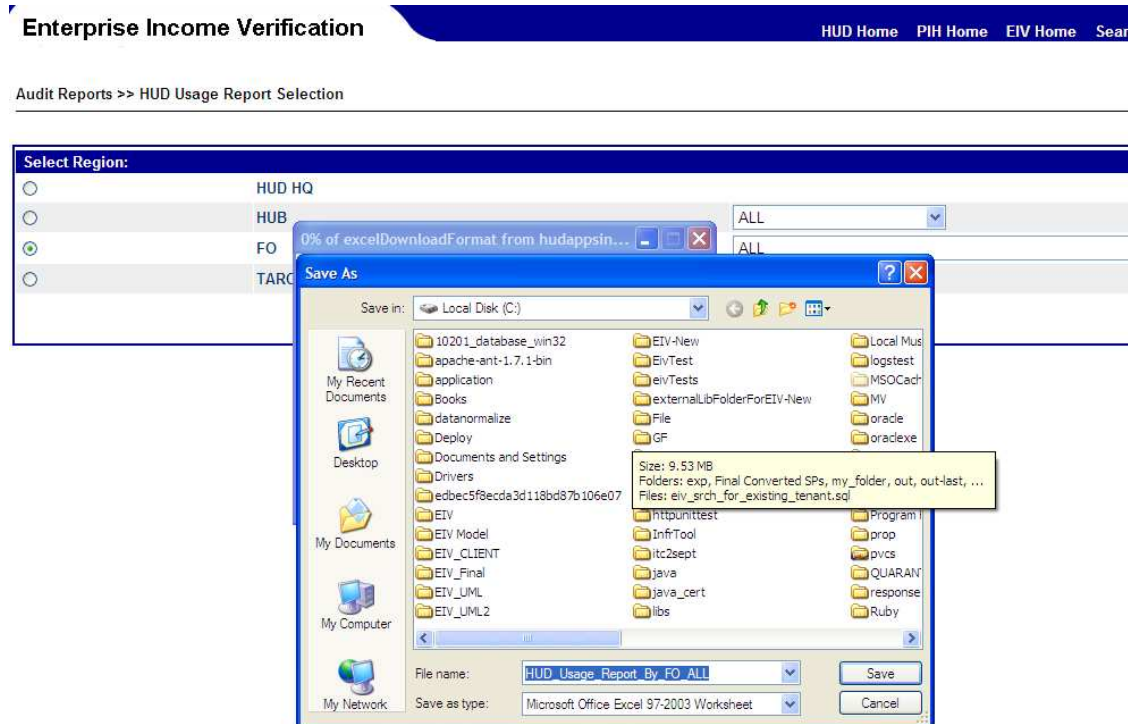
To view the HUD Usage Report, click the HUD Usage Report link available for Public Housing program User Administrators.

The system displays the **HUD Usage Selection** page as shown below.
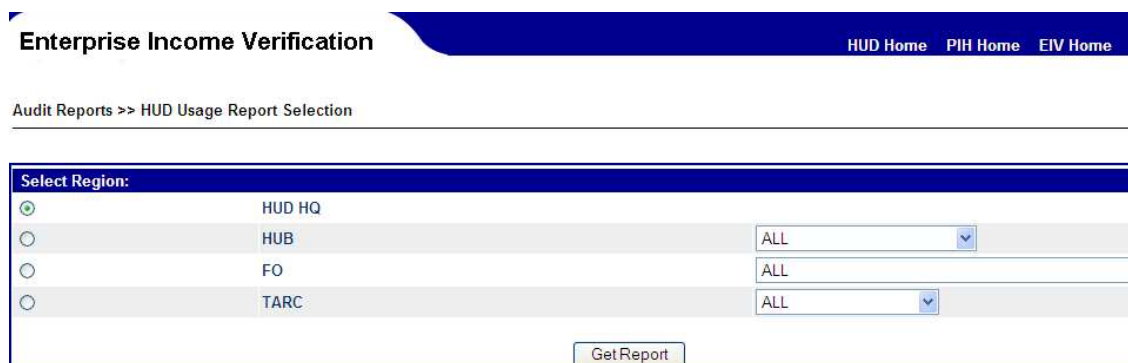
The following report options are available:

- HUD HQ
- HUB
- FO
- TARC

3.12.1 HUD HQ Option

When HUD HQ radio button is selected, the HUD HQ Usage Report is displayed as shown below.

Enterprise Income Verification   HUD Home   PIH Home   EIV Home

Audit Reports >> HUD Usage Report Selection >> HQ Usage Report

HUD Usage Report Summary as of 07/09/2011	
HQ	HQ
Total Number of Users	219

Next Group ⊙
1 - 50 of 219 Users Last Page

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Do

HUD Usage Report for HQ as of 07/09/2011				
User Id ⬍	First Name ⬍	Last Name ⬍	Accessed EIV in Last 30 days	Accessed EIV in Last 180 days
C03597	Ranjeev	Pamnani	N	N
C08397	Carmen	Cabayan	N	Y
C20672	Bobby	Martin	Y	Y
C23759	Tarshia	Porter	N	N
C25441	Nicole	Dodson	N	N
C27960	Vasanth	Kutty	Y	Y
C29168	Anjanette	Givens	N	Y
C30111	William	Anderson	N	N
C31039	Cozette	Moore	N	N
C54550	Bhaara	Sharma	N	Y
H01362	Flora	Sorina	N	N
H01890	Evelyn	Scott	N	N
H02088	Greg	Price	N	N
H02219	David	Sandler	N	N

3.12.2 HUB Option

Enterprise Income Verification

HUD Home   PIH Home   EIV Home   Search   Email

Audit Reports >> HUD Usage Report Selection >> HUB Usage Report

HUD Usage Report for HUB as of 07/09/2011	
HUB	10HSEA Seattle Hub
Total Number of Users	1

Printer-Friendly Version link

1 - 1 of 1 Users

Printer-Friendly Version

Download in Excel

Download In Excel link

HUD Usage Report for HUB as of 07/09/2011				
User Id ⬍	First Name ⬍	Last Name ⬍	Accessed EIV in Last 30 days	Accessed EIV in Last 180 days
H01548	Harlan	Stewart	N	N
H01801	Suzanne	Manville	Y	Y
H05848	Kathleen	Keul	N	N
H06462	Rebecca	Tuttle	N	N
H17103	Donna	Nye	N	N
H18965	Rosanne	Chavez	Y	Y
H22096	Chad	Trepinski	N	N

3.12.3 FO Option

Enterprise Income Verification

HUD Home PIH Home EIV Home Search Email

Audit Reports >> HUD Usage Report Selection >> FO Usage Report

HUD Usage Report Summary as of 07/09/2011	
FO	0APH SEATTLE HUB OFFICE
HUB	10HSEA Seattle Hub
Total Number of Users	6

1 - 6 of 6 Users

Printer-Friendly Version

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Printer-Friendly Version link

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HUD Usage Report for FO 07/09/2011				
User Id ⬍	First Name ⬍	Last Name ⬍	Accessed EIV in Last 30 days	Accessed EIV in Last 180 days
H03558	Joy	McCray	N	N
H06617	Cossette	Pontillas	N	N
H23743	Richard	Wall	Y	Y
H55886	Ann	Becker	N	N
H55973	Julia	Foss	N	N
H56880	Cabrini	Morris	N	N

Appendix A – Abbreviations and Acronyms

The following terms, abbreviations, and acronyms may or may not appear in this document. They are provided for reference and clarity.

Acronym	Definition
C&A	Certification and Accreditation
CAN	Claim Account Number
CCB	Change Control Board
CCMB	Configuration Change Management Board
CM	Configuration Management
CMRB	Contract Management Review Board
COTR	Contracting Officer's Technical Representative
DCG	Development Coordination Group
DRP	Disaster Recovery Plan
DTS	Data Transmission Services
EDI	Electronic Data Interchange
EIV	Enterprise Income Verification
FEIN	Federal Employer Identification Number
FIPS	Federal Information Processing Standards
FISCAM	Federal Information System Controls Audit Manual
FISMA	Federal Information Security Management Act
FO	Field Office
FOIA	Freedom of Information Act
Form HUD-50058	Form used to submit resident characteristics and tenant income data to HUD
FOUO	For Official Use Only
FTP	File Transfer Protocol
GTM	Government Technical Monitor
GTR	Government Technical Representative
HHS	U.S. Department of Health and Human Services
HOH	Head of Household
HOUSING	Office of Housing - FHA
HUB	Not an acronym. FO's are classified into two categories -- HUB and Program Center. A HUB can be a stand-alone FO or have another offices or program centers report to it.
HUD	US Department of Housing and Urban Development
ICN	Income Control Number
IMS	Inventory Management System (formerly PIC)
MF Housing	Multifamily Housing
MOA/U	Memorandum of Agreement / Understanding
MTW	Moving To Work
NDNH	National Directory of New Hires
NIST	National Institute of Standards and Technology
OIG	Office of Inspector General
OMB	Office of Management and Budget
OPC	Office of Procurement & Contracts
PD&R	HUD's Office of Policy, Development and Research
PHA	Public Housing Agencies
PI	Period of Income

Acronym	Definition
PIA	Privacy Act Assessment
PIC	Public & Indian Housing Information Center (now IMS)
PIH	HUD's Office of Public & Indian Housing
POA&M	Plan of Action and Milestones
PVCS	Project Version Control System
PWS	Performance Work Statement
QA	Quality Assurance
QU	Quarterly Update
QW	Quarterly Wage
RHIIP	Rental Housing Integrity Improvement Project
RIM	Rental Integrity Monitoring
SEIN	State Employment Identification Number
SPH	HUD's Security Program Handbook
SPP	Security Program Policy
SS	Social Security
SSA	Social Security Administration
SSAA	System Security Authorization Agreement
SSI	Supplemental Security Income
SSO	Single Sign On (used in WASS)
SSP	System Security Plan
TARC	Troubled Agency Recovery Center
TASS	Tenant Assessment Subsystem
TRACS	Tenant Rental Assistance Certification System
TTP	Total Tenant Payment
V V&T	Verification, Validation, & Test
W-4	Federal form used to collect New Hires data
WASS	Web Access Security Subsystem