

QUICK REFERENCE GUIDE:

Adding a User under User Administration Function

As of EPIC Release 5.0 (December 2020), Field Office Users (*HUD Users*) are able to obtain the “Create User” Role, which allows the creation and editing of Public Housing Agency (PHA) User IDs in EPIC. This ability is also automatically added for all *Recipient Administrators*. Both HUD and PHA users are restricted to adding/editing users within their currently assigned Field Office or PHA.

To add a user to EPIC from the Home Screen:

- 1) Click on User and Group Tools



Figure 1: Main Page with Tabs

- 2) Click on User Administration



Figure 2: User and Group Tools Tab Drop Down Options

- 3) Check to see if the user is already registered in EPIC by searching for their ID Number in the Search Box:

The image shows the "User Administration" search interface. It includes a search bar with the following fields: "Find user by:" with radio buttons for "HUD ID", "PHA Code", "User Last Name or First Name", and "Award ID"; "Search Phrase:" with a text input field; "User Role:" with a dropdown menu set to "All Roles"; and a "Search" button. To the right, there is a "Filter User List by State/City:" section with dropdown menus for "All States" and "All Cities". Below the search bar, there is a "User Administration" section with a "Show 10 entries" dropdown. A table with columns "User Name", "HUD ID", "City", "State", "Email", "Phone", "Role", and "User Group" is shown, with the message "No data available in table" below it.

Figure 3: User Administration Link with Search Bar

4) Click the Create New User Box on the Lower Left

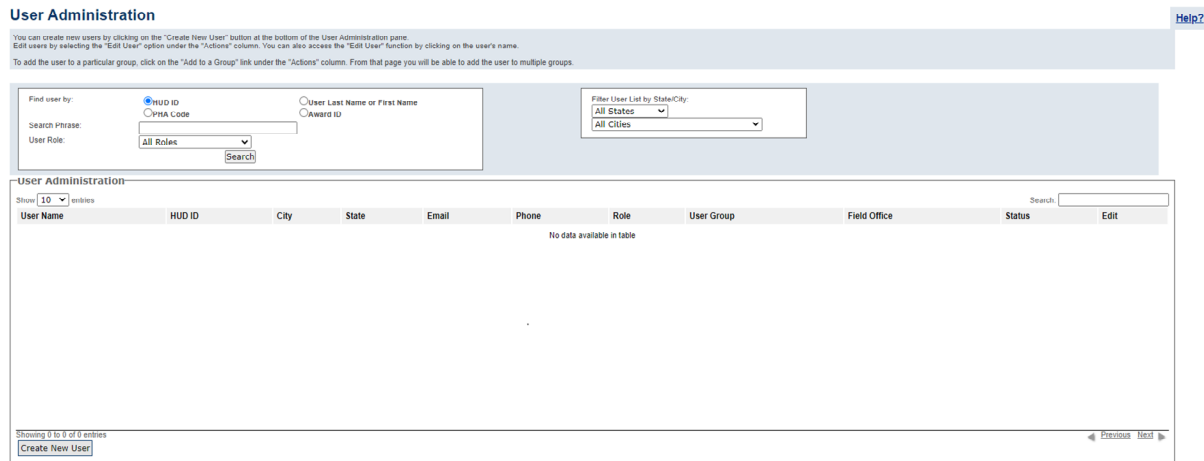


Figure 4: Create New User Button

5) Fill out all the Fields and Select Recipient Administrator and Public Housing from the Drop Down and Click Add.

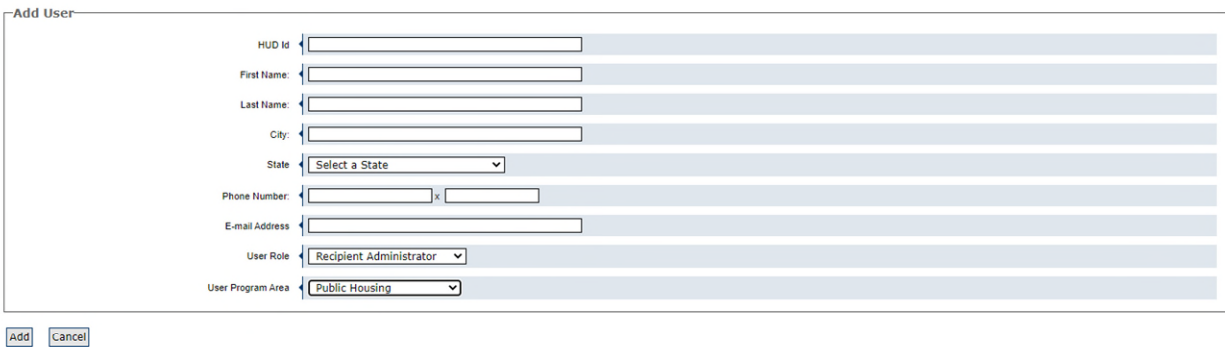


Figure 5: Create New User Screen

Note: Phone number must to have dashes (xxx-xxx-xxxx).

6) Click on User Group



Figure 6: User Group Link

7) Search for the PHA by using either the PHA Code, Name, or City and State:

Add User to New Groups

[Help?](#)

To add a user to a new group, first search for the group by using the filter options below. Once the desired group is found, click on the "Add" checkbox located under the Add column. If you need to add the user as read only to the group, select the "Add" and "Read Only" checkbox. Once you have selected the appropriate checkboxes, click on the Add User to Selected groups button.
Keep in mind that only groups that the user is not currently in will show in the table below. To remove a user from a particular group, use the Group Administration table [here](#).

User Information
Name: TEST 101 SMITH
HUD ID: RU101

Find a Group by name: Filter Group List by State/City: All States
All Cities

Find a Group by PHA Code:

Add to New Group

Group Information Add

No groups found.

Figure 7: Searching for Group

- 8) Add User to PHA (s) by selecting the check box and clicking Add User to Groups. Then click go back to List.

Add User to New Groups

[Help?](#)

To add a user to a new group, first search for the group by using the filter options below. Once the desired group is found, click on the "Add" checkbox located under the Add column. If you need to add the user as read only to the group, select the "Add" and "Read Only" checkbox. Once you have selected the appropriate checkboxes, click on the Add User to Selected groups button.
Keep in mind that only groups that the user is not currently in will show in the table below. To remove a user from a particular group, use the Group Administration table [here](#).

User Information
Name: TEST 101 SMITH
HUD ID: RU101

Find a Group by name: Filter Group List by State/City: All States
All Cities

Find a Group by PHA Code:

Add to New Group

Group Information Add

			Add	
WILMINGTON HOUSING AUTHORITY	WILMINGTON	NC	<input type="checkbox"/> Add	<input type="checkbox"/> Read Only

Figure 8: Add User to Selected Group

- 9) Check to make sure the user information is correct and that correct grants show up by clicking on the blue link with *User Name*.

User Administration

Help?

You can create new users by clicking on the "Create New User" button at the bottom of the User Administration pane. Edit users by selecting the "Edit User" option under the "Actions" column. You can also access the "Edit User" function by clicking on the user's name. To add the user to a particular group, click on the "Add to a Group" link under the "Actions" column. From that page you will be able to add the user to multiple groups.

User updated successfully

Find user by: HUD ID User Last Name or First Name

PITA Code Award ID

Search Phrase:

User Role:

Filter User List by State/City:

All States

All Cities

User Administration

Show: entries

User Name	HUD ID	City	State	Email	Phone	Role	User Group	Field Office	Status	Edit
SMITH, TEST 101	RU101	WASHINGTON	DC	test@test.gov	202-402-7131	Recipient Administrator			Active	

Showing 1 to 1 of 1 entries Previous Next

Figure 9: User Administration Page Showing User Name Link

User Information

HUD ID:	RU101	Email:	test@test.gov
Name:	SMITH, TEST 101	Phone Number:	202-402-7131
City/State:	WASHINGTON, DC		

User Groups

Group Information	Read Only Access	Actions
ALBEMARLE CITY OF ALBEMARLE HAG A	ALBEMARLE NC No	
LAGRANGE HOUSING AUTHORITY	LAGRANGE GA No	
HA STAR	STAR NC No	
HA SANFORD	SANFORD NC No	
HSG AUTH OF RALEIGH CTY	BECKLEY WV No	
MADISON HA	COLLINSVILLE IL No	

User Awards

Award Number	CFDA Program	Obligation Amount
NC19P07550110	0304	\$352,334.00
NC19P07550111	0304	\$299,489.00
NC19P07550112	0304	\$264,556.00
NC19P07550113	0304	\$285,155.00
NC19P07550114	0304	\$287,284.00
NC19P07550115	0304	\$292,217.00
NC19P07550117	0304	\$318,021.00
NC19P07550116	0304	\$299,940.00

Figure 10: User Information Page

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