REAC System Security User Guide

For PHAs

U.S. Department of Housing and Urban Development
Real Estate Assessment Center (REAC)

April 17, 2000
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Chapter 1: Introduction to HUD’s Security System

Purpose

The Real Estate Assessment Center (REAC) is a U.S. Department of Housing and Urban Development (HUD) national management center created to centralize and standardize the way HUD monitors and evaluates the physical condition and financial assessment of HUD properties. HUD properties include over 3,000 Public Housing Agencies (PHA) and over 30,000 Federal Housing Administration (FHA) multifamily insured, direct loan, HUD-held, and Section 8 project-based subsidized properties.

The information REAC uses to accomplish its mission is provided over the Internet. For this reason, a secure environment was developed to ensure HUD/REAC information is protected.

The purpose of this user guide is to familiarize PHAs with HUD’s Web-based security software. To protect the integrity, availability, and confidentiality of HUD/REAC information, proper security measures were established. For example, a user ID and password are required to access HUD’s secure systems. Potential users can register online for a user ID and a password.

Systems

Once you receive your user ID, you can access the Secure Systems page, which comprises REAC’s systems. The systems allow PHAs to submit information to REAC, as well as retrieve information from REAC only. Authorized PHA Users can access REAC systems, which include:

- Public Housing Assessment System
- Financial Assessment Subsystem-PHA
- Management Assessment Subsystem
- Resident Assessment Subsystem
- Tenant Assessment Subsystem

Types of Users

There are two types of Internet users: Coordinators and Users. The Coordinator serves as the PHA Executive Director’s representative in controlling access to the system and performing other system administration functions. The Coordinator controls which Users have access to prepare, review, or submit data on behalf of the PHA. A Coordinator is also responsible for forwarding information received electronically from HUD to the PHA Executive Director.
Although a User can enter or submit data (e.g., financial or management) to REAC, they cannot control access to the system. A User depends on the Coordinator for the necessary system rights to prepare, review, or submit data.

NOTE: The system limits each PHA to two coordinators. It is recommended that the PHA Executive Director designate two Coordinators to ensure backup for daily system administration needs.

**How to Use this Guide Effectively**

This guide provides step-by-step instructions on how to use HUD’s security system. Chapter 5, however, contains Coordinator functions only. Use the following table to determine which chapters of this guide you should read.

<table>
<thead>
<tr>
<th>COORDINATOR</th>
<th>USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read all chapters of this guide.</td>
<td>Read chapters 1 through 4.</td>
</tr>
</tbody>
</table>
Chapter 2: Registering for a User ID

Because users access HUD/REAC sensitive financial and housing information over the Internet, security registration for a user ID is required. An Internet user can access system information only after registering for a user ID, being assigned system and PHA data rights, and receiving their user ID.

NOTE: The term “user” is a generic term for individuals following the instructions of this guide. If “User” (with a capital ‘U’) is discussed, it refers to a specific type of Internet user (User v. Coordinator).

Coordinator and User Registration

All Coordinators and Users must submit a completed registration application to REAC to obtain a user ID. Required registration information includes name and social security number, the PHA’s name and code, email address, desired password, and mother’s maiden name. The registration form is available online from the REAC Web page.

Coordinator

Each PHA must designate a Coordinator, typically an employee, to act as their representative in providing system access to Users. The Coordinator is then responsible for retrieving a user ID for the User, establishing the User’s role in the system, assigning the User to the PHA (for access to the PHA’s data), and providing the User with their user ID.

NOTE: The system limits each PHA to two coordinators. It is recommended that each PHA designate two Coordinators to ensure backup for daily system administration needs.

A Coordinator can also serve as a User for the PHA. Therefore, if an individual will be responsible for system administration (Coordinator) and will also submit data (User), the individual should register as a Coordinator.

User

A User can be an employee of the PHA or a third party, such as a management agent, authorized by the PHA to submit data for the PHA.

Unlike a Coordinator, registered Users cannot control system access or perform system maintenance functions. The User is dependent on the Coordinator for system access as well as updating User information (e.g., email address).

REAC Web page

To register for a user ID and access the system, Coordinators and Users must go to the REAC Web page. In addition to a link to online systems, this page presents information about the latest online documentation, links to HUDweb pages, and other pertinent information.
NOTE: The content of this page is updated on a regular basis, therefore, its appearance may vary.
To access the online registration application:

1. From your desktop, double-click on the Internet browser (e.g., Netscape*). The Internet main page displays. The Yahoo!" main page is shown here as an example.

2. Place the cursor in the Location field under the toolbar.

3. Enter the following URL address: www.hud.gov/reac in the Location field. The REAC home page displays. Use the scroll bar to view the entire page.

NOTE: The content of this page is updated on a regular basis, therefore, its appearance may vary.
NOTE: The content of this page is updated on a regular basis, therefore, its appearance may vary.

4. Click on the online systems link. The Online Systems page displays.
online systems

If you already have a User ID, click on the "Log In" button to proceed directly to Secure Connection. Note that upon log in, the "User Name" field actually requires your user ID.

WHAT'S NEW

MULTIFAMILY FASS

Penalty Waived for Late FYE 12/31/99 Submissions. get details

ATTENTION FYE 3/31/00 PHAs

DO NOT log into the Management Assessment Subsystem (MASS) or enter certifications prior to April 17.

QUICK TIPS DESK REFERENCE

Are you too busy to read the secure systems guide? REAC has prepared handy, one page desk reference sheets with step by step instructions for obtaining user IDs and logging on the secure systems. They are quick, easy and colorful. Print them now.

NEED A USER ID? Find out how

5. At the bottom of the page, next to the Need a User ID, click on the Find out how link. The Registration Instructions page displays.

6. Scroll to the bottom of the page to view the Select a Secure Connection Registration Form section.

7. Click on the Public Housing Agency link. The PHA User Registration form displays.
PHA User Registration

To apply for a User ID, fill out the form below, and click Send Application when you are through. Upon verification of the information below, an ID will be assigned and mailed to the Executive Director of your Housing Authority. The password will not be disclosed, so make sure you remember it!!!

Application Type: [Coordinator]  [User]

First Name: 
Middle Initial: 
Last Name: 
Social Security Number: [ ] [ ] [ ]

Organization Information
• Provide the name of the Public Housing Authority you represent.
• Provide the Number of the Public Housing Authority you represent.
Organization Name: 
Organization ID: 

Provide your e-mail address.
• Include your e-mail user name, the @ sign and [servicename.com/edu/org/etc.]. For example: jsmith@aol.com, john_doe@adv.org, hdyb84a@prodigy.com.
E-mail Address: 

Choose a Password.
• You will enter your password each time you use this service. Your password should be 6 characters in length and should be comprised of letters and numbers (for example, brad83). Do not use punctuation or special characters. Important: Your password will be recorded EXACTLY as you type it, so make a note if you enter in upper and lower case.

Password: 
Re-enter Password for Verification: 

Mother’s Maiden Name.
• Please provide this information for future verification when processing password reset requests
Mother’s Maiden Name: 

Send Application  Clear Fields

NOTE: Except for the middle initial, all fields on this online application are required to receive a user ID.
Coordinator Registration

To register as a Coordinator:

1. From the PHA User Registration page, click the Coordinator radio button next to the Application Type.

| Application Type: | Coordinator | User |

2. Enter your First Name, Middle Initial, Last Name, and Social Security Number in the appropriate fields.

| First Name: | John |
| Middle Initial: | J |
| Last Name: | Johnson |
| Social Security Number: | 123-45-6789 |

NOTE: You can use the Tab key to move from one field to the next.

3. Enter the PHA’s name in the Organization Name field.

| Organization Name: | Columbus Metropolitan Housing |
| Organization ID: | OH001 |

4. Enter the PHA’s code in the Organization ID field.

5. Type your e-mail address.

| E-mail Address: | JJJ@mha.org |

6. The next field requires you to choose a password. Your password must be six characters, and can consist of letters and/or numbers.

Important: Your password is recorded EXACTLY as you type it, so remember how you enter any letters—uppercase or lowercase.
7. The last field requires you to enter your *Mother's Maiden Name* for future verification (e.g., if you forget your password).

   **Mother's Maiden Name:** Smith

8. Check to ensure the information in each field is correct. To correct a single entry, double-click in the field and enter the correct information. To clear all the fields, click on the Clear Fields button and re-enter all the information.

9. Click on the **Send Application** button to send the application to REAC. A confirmation page displays.

---

**PHA Coordinator Registration**

**PHA COORDINATOR REGISTRATION CONFIRMATION:**
- **First Name:** JOHN
- **Middle Initial:** J
- **Last Name:** JOHNSON
- **Social Security Number:** 123-45-7777
- **Organization Name:** COLUMBUS METROPOLITAN HOUSING
- **Organization ID:** OH001
- **E-mail Address:** JJJ@mha.org
- **Mother's Maiden Name:** SMITH

You are registering as a PHA Participant Coordinator for the PHA COLUMBUS METROPOLITAN HOUSING AUTHORITY - OH001.

Please confirm the following address for COLUMBUS METROPOLITAN HOUSING AUTHORITY:

980 EAST FIFTH AVE.
COLUMBUS OH 43201

Your requested Coordinator ID or activation code number will be mailed to the above address associated with the property owner, PHA or other HUD program participant you seek to represent as a coordinator. You will need to obtain your ID/code number from the program participant’s CEO or Executive Director at this address. If you do not recognize this as a current, complete or correct address associated with the HUD program participant you seek to represent, please cancel this application and have the program participant contact the appropriate HUD field office representative to obtain a clarification or correction of the address. If you do not know the HUD field office contact for this program participant, communicate your address concern to the REAC Customer Service Center, via the below e-mail click box at REAC_CSC Please provide your name and daytime phone number.

**Comments or Questions <REAC_CSC@hud.gov>**
NOTE: If the application is missing any information, an error message, along with a stop sign icon, displays identifying the missing information. If there is a problem with the social security number or the PHA code (Organization ID), the number is highlighted and an error message is provided.

Click on the button to return to the application form page. Complete or correct the missing information and then click on the button.

10. Review all the information for accuracy, especially the application type, PHA, and mailing address.

**PHA Coordinator Registration**

✓ Message: STANDARD USER REGISTRATION ACCEPTED FOR FURTHER PROCESSING

<table>
<thead>
<tr>
<th>First Name:</th>
<th>JOHN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle Initial:</td>
<td>J</td>
</tr>
<tr>
<td>Last Name:</td>
<td>JOHNSON</td>
</tr>
<tr>
<td>Social Security Number:</td>
<td>123-45-7777</td>
</tr>
<tr>
<td>Organization Name:</td>
<td>COLUMBUS METROPOLITAN HOUSING</td>
</tr>
<tr>
<td>Organization ID:</td>
<td>OH001</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:JJJ@mha.org">JJJ@mha.org</a></td>
</tr>
<tr>
<td>Mother's Maiden Name:</td>
<td>SMITH</td>
</tr>
</tbody>
</table>

NOTE: The mailing address appears only for Coordinators (not Users). Do not proceed with the application if this mailing address is inaccurate or you will not receive your user ID. If the PHA’s mailing address is incorrect, contact your local HUD field office to have it corrected and click on the button.

11. If all of the information is accurate, click on the button to submit the application to HUD. A message displays acknowledging acceptance of the registration application for further processing.


**Receiving Your User ID**

Coordinator registration applications are processed nightly. The PHA information is verified and a user ID is generated.

HUD sends a letter, containing the user ID, directly to the PHA Executive Director. The letter does not contain your password. You must remember the password you entered on the registration form! The PHA Executive Director should receive the letter from HUD within 2 weeks. The Executive Director approves the Coordinator as their representative by providing the Coordinator with their user ID.

**User Registration**

*To Register as a User:*

1. From the **PHA User Registration** page, click on the User radio button next to the Application Type.

   ![Application Type](Cooperator, User)

2. Enter your **First Name**, **Middle Initial**, **Last Name**, and **Social Security Number** in the appropriate fields.

   **First Name:**  
   **Middle Initial:**   
   **Last Name:**  
   **Social Security Number:** 123-45-7777

   NOTE: You can use the Tab key to move to the next field.

3. Enter the name of the PHA in the **Organization Name** field.

   **Organization Information**
   - Provide the name of the Public Housing Authority you represent
   - Provide the Number of the Public Housing Authority you represent

   **Organization Name:** columbus metropolitan housing

4. Enter the PHA’s code in the **Organization ID** field.
5. Type your e-mail address in the E-mail Address field.

E-mail Address: JJJ@nha.org

NOTE: It is important to provide your e-mail address so that HUD can communicate with you.

6. The next field requires you to choose a password. Your password must be six characters, and can consist of letters and/or numbers.

   Important: Your password is recorded EXACTLY as you type it, so remember how you enter any letters—uppercase or lowercase.

   Password: ********
   Re-enter Password for Verification: ********

7. The last field requires you to enter your Mother's Maiden Name for future verification (e.g., if you forget your password).

   Mother’s Maiden Name: Smith

8. Check to ensure the information in each field is correct. To correct a single entry, double-click in the field and enter the correct information. To clear all the fields, click on the Clear Fields button and re-enter all the information.

9. Click on the Send Application button to submit the application information. A confirmation page displays.

   PHA User Registration

   PHA USER REGISTRATION CONFIRMATION:
   First Name: JOHN
   Middle Initial: J
   Last Name: JOHNSON
   Social Security Number: 123-45-7777
   Organization Name: COLUMBUS METROPOLITAN HOUSING
   Organization ID: OH001
   E-mail Address: JJJ@cha.org
   Mother's Maiden Name: SMITH

   You are registering as a PHA Participant User for the PHA COLUMBUS METROPOLITAN HOUSING AUTHORITY - OH001.

   Please confirm that you are registering as a PHA Participant User and not as a Coordinator. After your registration is processed, the coordinator for COLUMBUS METROPOLITAN HOUSING AUTHORITY will disclose your ID to you.

   Confirm / Submit  Cancel Application

   Comments or Questions <REAC_CGC@hud.gov>
NOTE: If the application is missing any information, an error message, along with a stop sign icon, displays identifying the missing information. If there is a problem with the social security number or the PHA code (Organization ID), the number is highlighted and an error message is provided.

Click on the [Cancel Application] button to return to the application form page. Complete or correct the missing information and then click the [Send Application] button.

10. Review all the information for accuracy, especially the application type and PHA.

11. If the information is accurate, click on the [Confirm / Submit] button to submit the application to HUD. A message displays acknowledging acceptance of the registration application for further processing.

**Receiving Your User ID**

User registration applications are processed nightly. The PHA information is verified and a user ID is generated.

To obtain their user ID, the User must notify the Coordinator that they have registered for a user ID. Allow at least 24 hours after registering before requesting your user ID from the Coordinator. The Coordinator can retrieve the User’s ID from the system and assign necessary role(s) and PHA(s) to the User. A User can access the system after they receive their user ID from the Coordinator.
Chapter 3: Making a Secure Connection

To make a secure connection to HUD’s secure systems, you must log in with your user ID and password. Because the password is case-sensitive, it must be entered exactly as you requested it on the online registration application. For example, a password entered in lowercase letters during registration must always be entered in lowercase letters upon login to successfully log in to secure systems.

Accessing the System

You can log in to secure systems from the Online Systems page. You can bookmark the Online Systems page for quick access to log in.

To log in:

1. From your desktop, double-click on your Internet browser (e.g., Netscape®). The initial page displays. The Yahoo!® main page is shown as an example.
2. Double-click in the Location field under the toolbar to highlight the current URL.
   
   **NOTE:** Highlighting the URL allows you to overwrite it with the desired URL. You can also use the Backspace or Delete key to delete the current URL.

3. Enter the following URL address: **www.hud.gov/reac** in the Location field. The REAC home page displays. Use the scroll bar to view the entire page.

   **NOTE:** The content of this page is updated on a regular basis; therefore, its appearance may vary.

8. Click on the online systems link on the left side of the page. The online systems page displays.

   **NOTE:** This is a good page to bookmark for quick access to log in.
9. Click on the **LOG IN** button. The Username and Password window appears.

10. Enter your user ID in the User Name field.

11. Using the Tab key on the keyboard, move to the **Password** field.

12. Enter your password.

   *NOTE:* Your password is case-sensitive; enter the password exactly as you requested it on the registration application.
13. Click on the **OK** button. The **Secure Systems** page displays.

14. Under the **Systems** heading, click on the link for the subsystem you wish to access (e.g., FASS or RASS) to begin working.

**Exiting the System**

You can exit and return to the **Secure Systems** page at any time. Because it is a secure system containing sensitive public housing information, you should always exit the system when leaving the computer to ensure that data security is maintained.

*To exit the Secure Systems Web page:*

1. Save any changes on a page using the appropriate buttons.

2. Click on the Close control icon in the top right corner of the screen. The application closes and the desktop displays.
Chapter 4: Changing Your Password

On the Secure Systems page, under System Administration, the Password Change option allows Users and Coordinators to change their own passwords.

NOTE: Unlike user IDs, User passwords are not accessible to Coordinators.

To change your password:

1. From the Secure Systems page, click on the Password Change link. The Change Password page displays.

   ![Change Password](image)

   **Change Password**

   Please enter a new Password

   User ID: MI1111

   Old Password: ********

   New Password: ********

   Retype New Password: ********

   Login

   Notice to internet users: Your password change request may not take effect for up to 15 minutes.

   <BACK

2. Enter your old password and tab to the New Password field.

3. Enter your new password and tab to the Retype New Password field.

4. Retype the new password to verify it.

5. Click on the Login button. The old password is changed to the new password and the Secure Systems page displays.
NOTE: The password change is not instantaneous; it may take up to 15 to 30 minutes to take effect. Your old password is valid until the new password takes effect.

**Password Expiration**

Effective April 8, 2000, user passwords expire every 21 calendar days. The system automatically prompts you to change your password. You must remember how you saved your new password (i.e., uppercase or lowercase).
Chapter 5:  System Administration for Coordinators

As the Coordinator, you perform system administration functions to provide the PHA User with access to the system and to assign the User rights to the PHA’s data. First, you must establish yourself as a Coordinator in the system. Once established as a Coordinator in the system, you can then retrieve user IDs for registered Users of the PHA(s) you represent. You can also assign rights to Users to submit data for the PHA.

Secure Systems

The Secure Systems page contains two sections: Systems and System Administration. The Systems section provides underlined links to HUD’s secure systems. The list of underlined system links varies based on your rights to the system.

Primarily, the Systems Administration section allows Coordinators to control system access and update User information (e.g., email address). This section also provides a link available to all users that allows you to change your password.

NOTE: In this guide, “user” is a generic term for all individuals using HUD systems. If “User” (with a capital ‘U’) is discussed, it refers to a specific type of Internet user (User v. Coordinator).
**Establishing a Coordinator**

The first step in establishing yourself as a Coordinator begins when you receive your user ID from the PHA Executive Director. Your user ID, and the password you submitted in your registration application, allows you to log in and set up system rights.

**User ID Maintenance**

After you log in and access the Secure Systems page (refer to Chapter 3 for login instructions), you should perform system administration functions in the following order for the system to recognize you as a Coordinator in the system.

*To establish yourself as a Coordinator in the system:*


   ![User ID Maintenance Page](image)

2. Enter your user ID in the User ID field.

3. Click on the Maintain User Profile radio button.

4. Click on the Submit button. The Maintain User Profile page displays.

   *NOTE:* This page pertains to Coordinators only.
NOTE: This page does not reflect all of the systems that display. It has been manufactured for this guide as an example of just a few of the available systems. The actual page is too long to show here.

5. Click in the checkbox to the left of subsystem (e.g., MASS) to indicate the system desired.

NOTE: You can select as many systems as are applicable.
6. Click in the Add checkbox to the left of Action(s) to add an action for that system.

7. Click on “Coordinator” from the list of actions to highlight it. Use the scroll bar, if necessary.

NOTE: The Coordinator action is the only applicable and effective action. The other actions are displayed for reference purposes only.

8. Click on the Submit button. An Update Results page displays to confirm you as the Coordinator for the system you identified.
9. Click on the Review User link to verify the Coordinator action for the appropriate system(s) now appears in the Remove column.

<table>
<thead>
<tr>
<th>MASS</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Assessment System</td>
<td>Approve adjustments, Assess all PHA screens, Coordinator, Create draft, Distinguishes REAC director</td>
</tr>
</tbody>
</table>

| | Coordinator |
| | |

NOTE: The Remove column displays your current actions.

10. Click on the Secure Systems Menu link to return to the Secure Systems page, or click on the Close control icon to exit the system.

To remove a Coordinator action for a system:

1. From the Secure Systems page, click the User ID Maintenance link. The User ID Maintenance page displays.
2. Enter the Coordinator’s ID in the user ID field.
3. Click on the Maintain User Profile radio button.
4. Click on the Submit button. The Maintain User Profile page displays.
5. Locate the system for which the Coordinator action is to be removed. Use the scroll bar, if necessary.
6. Click on the Remove checkbox in the last column.
7. Highlight “Coordinator” from the Remove column.
8. Click on the Submit button. The Update Results page displays, confirming Coordinator rights are removed for that system.

Systems

- Financial Assessment Submission - PHA (FASPHA)
- Resident Assessment Subsystem (RASS)
- Management Agreement Subsystem (MASS)

System Administration – Guide

- User Group Maintenance
- User ID Maintenance
- Business Partners Maintenance
- FHA Assignment Maintenance
- Password Change

Last Modified: September 5, 1999
Providing Your User with System Access

After a User has registered with HUD and notified you (the Coordinator) of their registration, you can retrieve the user ID for the User. You also assign the User a system role and rights to the PHA’s data. Finally, you provide the User with their user ID.

NOTE: Registration applications are processed nightly, so allow at least 24 hours after a User has registered before attempting to retrieve their user ID.

User ID Maintenance

As the PHA’s Coordinator, you are responsible for controlling access to the system and the PHA’s data. You should verify a User is authorized to do business for the PHA prior to allowing the User access to the system and the PHA’s development data. The first step in assigning the User system rights is to retrieve the user ID for the User.

To retrieve a user ID for a User:


2. Click on the Retrieve User IDs radio button.

3. Click on the Submit button. The Retrieve User IDs page displays.
4. Enter the selection criteria, if appropriate. Refer to the following table.

NOTE: All fields on this page are optional. The more specific you are, however, the quicker the search results appear.

<table>
<thead>
<tr>
<th>SELECTION CRITERIA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Allows you to retrieve the user ID for an individual user by typing in their full or partial last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>Allows you to retrieve the user ID for an individual user by typing in their full or partial first name.</td>
</tr>
<tr>
<td>Date Range</td>
<td>Allows you to enter a range of registration dates to retrieve the list of Users that registered during that period. For example, you have several Users that registered in the same week and you want to retrieve all of their user IDs at once. Use the 2-digit month, 2-digit day, and 4-digit year format when entering a date range. Tab from one field to the next.</td>
</tr>
</tbody>
</table>

*Date range applies to the date on which the user ID was created or last updated.

Clicking on the Submit button allows you to view the entire list of Users and their user IDs. You do not need to enter the above criteria.
5. Click on the Submit button. The User List page for the PHA displays, including the PHA’s tax ID and a list of all Users that registered in the specified date range for the PHAs you represent. Refer to the User ID column.

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>User ID</th>
<th>Stat</th>
</tr>
</thead>
<tbody>
<tr>
<td>CH001</td>
<td>DAVIS</td>
<td>ANN</td>
<td>M80001</td>
<td>A</td>
</tr>
<tr>
<td>CH001</td>
<td>FLYNN</td>
<td>REBECCA</td>
<td>M80019</td>
<td>A</td>
</tr>
</tbody>
</table>

NOTE: To go directly to a User’s summary information, click on the User ID link for that individual (e.g., M80019 for Rebecca Flynn).

6. Click on the User Maintenance link. The User ID Maintenance page displays.

NOTE: To go directly to a User’s summary information, click on the User ID link for that individual (e.g., M80019 for Rebecca Flynn).

**System Roles for the User**

The next step, after retrieving the user ID for the User, is to assign a role that enables the user to perform appropriate functions in the system. But before you begin to assign a role(s) for the user, review the following table. By system, it provides a description of each role currently available to PHAs (as of April 8, 2000) so you can authorize necessary rights for the User in the appropriate system(s).

NOTE: As the systems change, these roles may change, become obsolete, or be added.
### FASS PHA:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPA Verifier</td>
<td>Audits the PHA’s FASS submission prior to its being sent to HUD.</td>
<td>CPV</td>
</tr>
<tr>
<td>PHA Director</td>
<td>Creates, saves, and submits the following:</td>
<td>PID</td>
</tr>
<tr>
<td></td>
<td>• unusual circumstance requests,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• manual submission requests,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• draft submission data, including late reason, manual submission and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>extension requests and,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• finalized submission requests.</td>
<td></td>
</tr>
<tr>
<td>PHA Submitter</td>
<td>Same rights and restrictions as the PHA Director role; user is not a PHA</td>
<td>SMT</td>
</tr>
<tr>
<td></td>
<td>Executive Director.</td>
<td></td>
</tr>
<tr>
<td>PHA Analyst</td>
<td>Same rights and restrictions as the PHA Director and PHA submitter roles</td>
<td>FIA</td>
</tr>
<tr>
<td></td>
<td>except the User assigned this role cannot submit the financial data.</td>
<td></td>
</tr>
</tbody>
</table>

### MASS:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHA User</td>
<td>Creates and saves draft submission data.</td>
<td>PHU</td>
</tr>
<tr>
<td>PHA Executive</td>
<td>Creates and saves draft data; submits management data.</td>
<td>PHD</td>
</tr>
<tr>
<td>Director</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PHAS:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>VPS (View PHAS Score)</td>
<td>Gives the user read-only access to their PHA’s published PHAS score.</td>
<td>VPS</td>
</tr>
</tbody>
</table>
**RASS:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Role Code</th>
</tr>
</thead>
</table>
| PHA Certifier             | Certifies the PHA’s data for REAC. The PHA Certifier certifies:  
  • unit addresses and,  
  • data in the PHA’s Implementation and Follow-up Plans.  
  The PHA Certifier can also create, save, and update Unit Addresses as well as the PHA’s Implementation and Follow-up Plans. | PCR       |
| PHA Submitter             | • Submits draft data for certification;  
  • has read-access to the RASS PHA Main page and the reports generated there;  
  • creates, saves, and updates the PHA’s Implementation Plan, Validated Address data and,  
  • the PHA’s Follow-up Plan.                                                                                                     | PSB       |

**TASS:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitter of Status on Income Discrepancy Resolution</td>
<td>Provides information on the actions taken by the PHA to resolve income discrepancies with tenants. These discrepancies are identified by REAC computer matching with Federal tax information</td>
<td>TRK</td>
</tr>
</tbody>
</table>
| Reviewer of Social Security (SS) and Supplemental Security Income (SSI) reports | **This role is not yet available. It is scheduled for release within calendar year 2000.**  
  The user assigned this role will have read-only access to social security and supplemental security income reports that are used in recertifying tenants for rental assistance. |           |

After reviewing the roles, you can assign the appropriate one(s) to your user. The **Maintain User Information** page allows you to assign a role to the User. At the top of the page, the user ID is identified. The majority of the fields presented on the page, however, come from registration information, including name, e-mail address, and organization ID (PHA code). You can update the user’s name and e-mail address on this page when necessary. The default is “Active,” which is appropriate for a new or current user. “Terminated” inactivates the user ID, restricting access to secure systems. For example, if a User will be on extended leave, their ID should be terminated until their return. This page also identifies the User as a Coordinator or a User. Finally, on the **Maintain User Information** page, you can assign or delete a User’s role(s).
To assign a system role to a User:

1. On the User ID Maintenance page, enter the user ID for the User in the User ID field.
2. Click on the Maintain User Information radio button.

3. Click on the Submit button. The Maintain User Information page displays.
4. To assign a role, click on the checkbox next to Assign Role(s).

5. Click on the role to select it from the list. To select multiple roles, hold down the Ctrl key and click on the roles.

NOTE: The Coordinator only sees for the system(s) he or she identified on the Maintain User Profile page. For example, if you serve as Coordinator for MASS, only MASS roles will display for assignment purposes.
6. Click on the **Update** button. The **Update Results** page displays, confirming the role update was successful.

![Update Results](image)

**Update Results**

All updates have been successfully completed.

[Review User M80019]

[Secure Systems Menu] [User Maintenance]

**NOTE:** To review the current role, click on the **Review User** link. The **Maintain User Information** page displays again. The role now displays in the right column under **Delete Role(s)**, which displays currently assigned role(s).

<table>
<thead>
<tr>
<th>Assign Role(s)</th>
<th>Delete Roles(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FASPAN - FASS PHA Submitter</td>
<td>MASS - MASS - PHA User</td>
</tr>
<tr>
<td>FASPAN - HUD Guest User</td>
<td></td>
</tr>
<tr>
<td>FASPAN - PHA Analyst</td>
<td></td>
</tr>
<tr>
<td>FASPAN - PHA Director</td>
<td></td>
</tr>
<tr>
<td>MASS - MASS - PHA Director</td>
<td></td>
</tr>
<tr>
<td>RASS - PHA Certifier</td>
<td></td>
</tr>
<tr>
<td>RASS - PHA Submitter</td>
<td></td>
</tr>
<tr>
<td>RASS - REAC RASS Third Party Contractors</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** To delete a role, remember to first click the checkbox next to **Delete Role(s)**, click on the role to highlight it, and click the update button to accept the changes.

7. Click on the **Secure Systems Menu** link to return to the Main Menu. The **Secure Systems** page displays.
PHA Assignment Maintenance

In addition to a system role, the User must also be assigned to the PHA to have access to the PHA’s data. As the Coordinator, you can only assign Users to PHA(s) you represent.

To assign a PHA to a User:

1. From the Secure Systems page, click on the PHA Assignment Maintenance link. The PHA Assignment Maintenance page displays.

2. Enter the user ID for the User in the User field.

3. Click on the Assign PHA radio button.

4. Enter the selection criteria, if appropriate. Refer to the following table.

   NOTE: All fields on this page are optional. The more specific you are, however, the quicker the search results appear.
Selection Criteria | Description
--- | ---
PHA ID | Allows you to enter the PHA ID (code) to assign a specific PHA to the User.
State | Allows you to select the state for which you serve as Coordinator. For example, if you do not know the PHA ID (code), you can select the state to find it.
View Selection | Allows you to view the entire list of PHA(s) for which you serve as Coordinator.

5. Click on the **View Selection** button. The **Assign PHA for User** page displays.

### Assign PHA For User M80019

**Roles**
- M800 - PHA User (PHU)
- PHA Analyst (PA)
- PHA Submitter (PS)

**PHAs**
- DHCD - COLUMBUS METROPOLITAN HOUSING AUTHORITY

[Main Menu] [User Group Maintenance] [User Maintenance] [PHA Maintenance]

6. Click on the appropriate User *Role* from the list to highlight it.

7. Click on the appropriate *PHA* from the list to highlight it.

   **NOTE:** To select multiple PHAs, hold the Ctrl key down and click on the PHA(s).

8. Click on the **Update** button. The **Update Results** page displays.
9. Click on the PHA Maintenance link to return to the PHA Assignment Maintenance page.

To view a User's current PHA assignments:

1. From the PHA Assignment Maintenance page, enter the User’s ID in the User field.  

2. Click on the View or Unassign PHA radio button.

3. Click on the View Selection button. The Unassign PHA page displays, which shows all PHAs the User is currently assigned. The role code reveals what the user is authorized to do with the PHA’s data (see section on System Roles for the User).
4. Click on the PHA Maintenance link to assign additional PHAs; or click on the User Maintenance link to assign roles or update User information; or click on the Main Menu link to return to the Secure Systems page.

To delete a User's rights to a PHA:

1. From the PHA Assignment Maintenance page, enter the user ID for the User in the User field.

2. Click on the View or Unassign PHA radio button.
3. Click on the **View Selection** button. The **Unassign PHA** page displays, listing the PHAs currently assigned to the User.

4. Click on the checkbox to the left of the PHA ID (code) to select the PHA to unassign.

5. Click on the **Submit** button. The **Update Results** page displays.

6. Click on the **Secure Systems Menu** link to return to the **Secure Systems** main page, or click on the Close control icon to exit the system.
Final Step in Providing Your User System Access

After retrieving the user ID for the User, assigning the User the appropriate role and PHA(s), you can now provide the user with their User ID to access the system and begin working.
Business Partners Maintenance

The Business Partners Maintenance feature allows Coordinators to represent additional business partners (e.g., PHAs). You only register for a user ID once. If you need to represent additional PHAs as their Coordinator, you must request a new business partner relationship for each subsequent PHA. Once the new relationship is activated in the system, you can act as the Coordinator for the additional PHA.

Establishing Additional PHA Relationships

Remember, Coordinators are determined by the PHA’s Executive Director. The first step in establishing a new business partner relationship (in addition to the PHA under which you are registered) is to make a request to be the Coordinator for the additional PHA in the system.

To request a new business relationship:


   ![System Administration](image)

   1. Enter your user ID in the User ID field.
   2. Select the Request New/Delete Existing Relationships radio button.
   3. Click on the Submit button. The Delete/Request Relationships page displays. The “Original Relationship” identifies the PHA you registered under. The list box immediately below displays additional PHAs you represent (if any).
5. Scroll down to the *Request Relationships* section. Click in the first column, and enter the *PHA ID* (code) for the PHA.

   **NOTE:** You can add up to 10 at a time.

6. In the *Business Partner Type* column, click on the right drop-down arrow to view a list of options.
7. Click on the "PHA" option to select it.

8. Click on the Add button at the bottom of the page. A Confirmation page displays.

   Request Relationships For User M80018
   Confirmation

   Add Participant Info          Confirm
   OH066
   MORGAN METROPOLITAN HOUSING AUTHORITY
   4512 NORTH STATE ROUTE #376 NW
   MCCONNELSVILLE OH 43756-0000

   Submit  Cancel

   [Main Menu] [User Group Maintenance] [User Maintenance] [Business Partners Maintenance]

   NOTE: The system automatically checks the PHA ID against the HUD database. A message displays if the information is not valid. If the information is not correct, click the Cancel button to return to the previous page and re-enter the correct information.

9. Click on the Confirm checkbox to confirm you are requesting to be the PHA’s Coordinator.

   Request Relationships For User M80018
   Confirmation

   Add Participant Info          Confirm
   OH066
   MORGAN METROPOLITAN HOUSING AUTHORITY
   4512 NORTH STATE ROUTE #376 NW
   MCCONNELSVILLE OH 43756-0000

   Submit  Cancel

   [Main Menu] [User Group Maintenance] [User Maintenance] [Business Partners Maintenance]

10. Click on the Submit button to submit the request.
11. Click on the Main Menu link to return to the Secure Systems page, or click the Close control icon to exit the system.

Activating an Additional PHA Relationship

After requesting an additional PHA relationship, HUD sends the PHA's Executive Director a letter to verify you as the PHA's Coordinator and provide the Executive Director with your activation key. The activation key is a string of characters, consisting of letters and numbers. A Coordinator is authorized when they receive their activation key from the Executive Director. The Coordinator then needs to activate the relationship with this additional PHA in the system.

To activate an additional PHA relationship:

1. On the Business Partners Maintenance page, enter your user ID in the User ID field.

2. Click on the Activate Relationships radio button.
3. Click on the Submit button. The Activate Relationships page displays.
### Activate Relationships For User M80018

<table>
<thead>
<tr>
<th>TIN/SSN/PHA ID</th>
<th>Activation Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td></td>
</tr>
<tr>
<td>987654321</td>
<td></td>
</tr>
<tr>
<td>111111111</td>
<td></td>
</tr>
<tr>
<td>222222222</td>
<td></td>
</tr>
<tr>
<td>333333333</td>
<td></td>
</tr>
<tr>
<td>444444444</td>
<td></td>
</tr>
<tr>
<td>555555555</td>
<td></td>
</tr>
<tr>
<td>666666666</td>
<td></td>
</tr>
<tr>
<td>777777777</td>
<td></td>
</tr>
<tr>
<td>888888888</td>
<td></td>
</tr>
<tr>
<td>999999999</td>
<td></td>
</tr>
</tbody>
</table>

4. In the left column, click on the PHA to select it. Use the scroll bar if necessary.

5. Click on the **>>>>>>** button. The *PHA ID* automatically displays in the middle column.

   **NOTE:** To deselect an organization, click on the **<<<<<** button.

6. In the right column, enter your *Activation Key* and click on the **Submit** button. The *Activation Results* page displays.

   **NOTE:** If the relationship was not activated, return to the previous page and correct the errors.

7. Click on the **Main Menu** link to return to the Secure Systems main page.

---

April 17, 2000
Deleting a PHA Relationship

If you, or the backup Coordinator, no longer serve as the Coordinator for a PHA, the relationship with the PHA must be deleted. Remember the system limits each PHA to a maximum of two Coordinators.

To delete a Coordinator relationship with a PHA:

1. On the Business Partners Maintenance page, enter the Coordinator’s user ID in the User ID field.

2. Click on the Request New/Delete Existing Relationships radio button.
3. Click on the **Submit** button. The **Delete/Request Relationships** page displays.

![Delete Relationships For User M80018](image)

4. In the **Delete Relationships** section, click on the PHA to select it. Use the scroll bar, if necessary.

5. Click on the **Delete** button to delete the Coordinator relationship with the PHA. The **Update Results** page displays confirming your deletions.
Update Results

All updates have been successfully completed.

[Review User M80019]

[Secure Systems Menu] [User Maintenance]

6. Click on the Secure Systems Menu link to return to the Secure Systems page, or click on the Close control icon to exit the system.
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APPENDIX A. PHA Coordinator and PHA User Tip Sheets

[see attached]