

CNA e-Tool Version 3.2

USER ACCESS GUIDE

January, 2025

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Getting Started

The Capital Needs Assessment Electronic Tool (CNA e-Tool) automates the initiation, preparation, submission, review, and approval of a Capital Needs Assessment (CNA). Find the CNA e-Tool webpage at the following URL: <u>https://www.hud.gov/program_offices/housing/mfh/cna</u>

The CNA e-Tool Version 3.2 is a web-based application that uses HUD's Secure Systems Platform. Obtaining access to any Secure Systems application requires the user to get a user ID credential.

Intended Audience

To access the CNA e-Tool Version 3.2, each organization external to HUD will need a coordinator. The role of the Coordinator is to ensure their users are correctly assigned system privileges. All users external to HUD will require an M-id to access CNA e-Tool.

This document is a user access guide for HUD employees and all external users and their coordinators. As part of CNA e-Tool Version 3.2, all users will need a credential (M-id) to use the system. External parties requiring secured access will consist of FHA Lenders, Needs Assessors, Participating Administrative Entities, and Public Housing Authorities (PHA) serving as Rental Assistance Demonstration (RAD) Project Sponsors. Listed below are the following User ID credentials that are available and described in this document:

Users External to HUD

- Mortgagee Lender ID (M-ID) → FHA Lender
- Multifamily Business Partner (M-ID) → Needs Assessor, Multifamily Assessments Contractor (MAC) Users, and Participating Administrative Entity
- PHA User (M-ID) → Public Housing Agency Employee/Consultant
- Owner (M-ID) → Property Owner User

Users Internal to HUD

• HUD Staff ID (H-ID) or Contractor ID (C-ID) → HUD Employee

Secure Access Introduction

HUD does not have a single enterprise access system that covers all HUD external parties who will use CNA e-Tool Version 3.2: (1) Lenders, (2) Multifamily Business Partners, and (3) PHA Users. Therefore, the credentialing process is different for all three to acquire their M-ID and CNA e-Tool access and roles.

If the external party wants to do business with HUD, then that company will first need to have As of January, 2025 Page 4 an established organizational identity. This process requires the external party to identify its coordinators and to manage access and provide CNA e-Tool

Version 3.2 roles for their employees. When an employee from an external party seeks CNA e-Tool access, they must notify their Coordinator. The Coordinator then provisions the User ID for their employees. Finally, the company coordinator takes care of changes in personnel and their access. The same pattern exists for all lenders, Multifamily Business Partners, and PHA Users.

FHA Lender Access

Lenders and their coordinators need to do the following in chronological order:

- 1. Get an FHA Connection issued Mortgagee Lender ID (M-ID) by registering in FHA Connection (if they do not have an M-ID already). The lender will need to take note of their M-ID and save their password for the login process.
- The lender then needs to contact their Coordinator. The lender should let their Coordinator know if they want to have the External Viewer and/or External Submitter Roles for the CNA e-Tool
- 3. The Coordinator will give their lenders CNA e-Tool roles through the FHAC ID Maintenance.

Note: FHA Lenders have only two roles available within the CNA e-Tool: External Submitter or External Viewer. These roles must be assigned to the lender by their company coordinator. Please refer to the FHA Connection user registration instructions for more details. The CNA e-Tool Team cannot give lender roles or access to the CNA e-Tool. All FHA Lenders must go through their company coordinator in FHAC, and that person will grant/revoke access and roles to the CNA e-Tool through FHAC's ID Maintenance once the lender's M-ID is established. More Information on obtaining a Mortgagee Lender ID is available at the following URL: **Registering a New User.**



If the lender runs into issues with registration, they should read through the following document, which explains the registration procedure: <u>FHAC Registration Procedures</u>. In addition, the lender should contact their lender company coordinator for assistance with CNA e-Tool access and roles. This PDF also discusses how a lender can register as a coordinator. For more information on how to become an FHA Approved Lender, see <u>Appendix A</u>.

2.1 FHA Lender Login Process Overview

FHA Lenders will need a Mortgagee Lender ID (M-ID) to access the CNA e-Tool. Lenders must first log in to FHA Connection at the following link:

https://entp.hud.gov/clas/html/connection.cfm to start the three-step login process.

- 1. Login to FHA Connection (which is a portal for FHA lenders)
- 2. Login to Secure Systems
- 3. Select the CNA e-Tool Version 3.2

2.2 Responsibility of the FHA Lender Coordinator

The lender company coordinator is responsible for assigning the External Viewer and/or External Submitter roles to the M-ID lender users within their own company. For more information about granting access and roles, please go to the following URL: <u>https://entp.hud.gov/pdf/mp_gs2_reguser.pdf</u>

Before receiving the M-ID, the lender user may contact their company coordinator to let them know that they need an M-ID and a CNA e-Tool role(s). When FHA Connection generates the M-ID, it automatically emails the lender user (informing them that their M-ID was issued). The

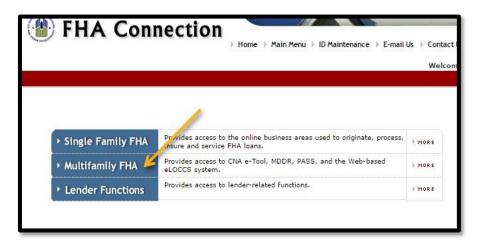
lender's Company Coordinators are copied on the email so that the lender user will have the email addresses of their coordinators to facilitate future communication if needed.

2.3 Visual of the FHA Lender Login Process

Once the lender user receives their M-ID and CNA e-Tool roles from their company coordinator, they can access the CNA e-Tool. The very first thing they need to do is to sign on to FHA Connection at the following URL: <u>https://entp.hud.gov/clas/html/connection.cfm</u>



Next, the lender user should navigate to the Multifamily main menu.



Next, the lender should select CNA e-Tool – Capital Needs Assessment

Multifamily FHA		Message Boards Updated as of:
Multifamily Delinguency and Default		
Reporting		
Physical Assessment		
eLOCCS - Line of Credit Control System		
Active Partners Performance System	-	Monday, May 18, 2015
Multifamily Premiums Menu 💋		
CNAe-tool - Capital Needs Assessment		

Next, the lender will be redirected to the Secure Systems login screen. Then, the lender will be required to enter their credentials again (M-ID and Password) to log in to Secure Systems.

	User Login	faq holp search homo
Secure Systems Single Sign On	User ID	
	Login Can	-el
	 There is an inactivity timeout of 30 minutes. There is a session timeout of 4 hours. Once r where you left off. This computer system, and all the systems a 	ect login attempts. ss Reset Password and other useful information. Please save your work periodically to avoid being logged out. eached, you will need to re-authenticate after which you can resume work sociated with this system for User Authorization and Authentication, are authorized access to these systems is not permitted; and usage may be
	Content updated May 21 2016	
	U.S. Department of Housing and Urban Developme 451 7th Street S.W., Washington, DC 20410 Telephone: (202) 708-1112 TTY: (202) 708-1455	Home Privacy Statement

In the next step, the user will be redirected to the following page, which should be reviewed in detail.

	User Login	fm; help search home logest
Secure Systems		
		ain an active ID. If you do not login again before <u>19 May 2020,</u> your ID deactivated, please contact the TAC to reactivate your ID.
	Leg	al Warning
	Misuse of Federal Information through provisions of title 18, United States Code	the HUD Secure Connection web site falls under the Section 1030. This law specifies penalties for exceeding ge, or destruction of information residing on Federal Computers.
	Wai	ning Notice
		oftware supports Internet Explorer 7.0 browser. Other be compatible with this software.
	Messa	age of the Day
	Welcor	ne to Secure Systems
		Accept
	Content updated January 6, 2018 U.S. Department of Housing and Urban Development 451 7th Street S.W., Washington, DC 20410	Back to Toe Home Privacy Statement
	Telephone: (202) 708-1112 TTN (202) 708-1435	

After clicking the "Accept" button, the lender will be redirected to the Secure Systems Main Menu, which will list links to all applications that the user ID is authorized to access. In the final step, the lender must select the CNA e-Tool. 3.2.



Note: Lender users should remember to log in to both FHA Connection and Secure Systems at least once every 90 days to ensure that their M-ID is not locked due to inactivity.

Multifamily Business Partner Access

3.1 Getting Started in APPS

To improve security, both the Multifamily Business Partner and their Coordinator must have login credentials. To start this process, it will require the principal of the firm/organization (or their designee) to register based on their Tax Identification Number (TIN) in the Active Partners Performance System (APPS). Please click this IRS <u>link</u> to find out how to get a TIN. APPS registration is a prerequisite before any Business Partner user, or their Coordinator can apply for their M-ID. Please see <u>Appendix B</u> to get more information on how to register in <u>APPS</u>.

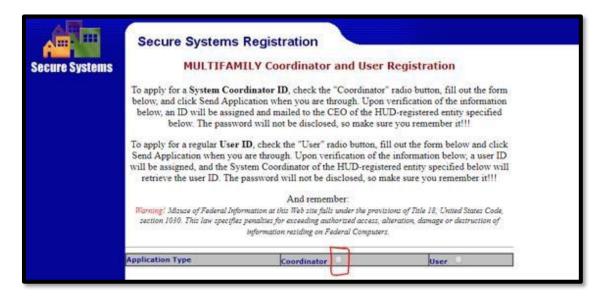
3.2 Credentials for the Multifamily Business Partner

After the M-ID is acquired, it will serve as the Business Partner's username going forward. When logging into Secure Systems to access the CNA e-Tool, they will also need their password to log in to the system.

The Multifamily Business Partner user and their Coordinator require the M-ID credential to access the CNA e-Tool. Every Multifamily Business Partner who applies for an M-ID must also know their Firm/organization's TIN Number before applying for their M-ID credential. The Business Partner is assigned their roles only by their Coordinator based on the TIN Number they provide during the application process.

3.3 How to become a Multifamily Business Partner Coordinator

The Coordinator applicant must go to the <u>Secure Systems Business Partner Application page</u> to apply to be a Coordinator for their organization.



To apply, the Coordinator must check the "Coordinator" radio button, fill out the form below, and click "Send Application" when complete.

3.4 How to become a Multifamily Business Partner User

The Business Partner applicant must go to the <u>Secure Systems Business Partner Application</u> <u>page</u> to apply to be a user for their organization.



To apply, the user must check the "User" radio button, fill out the form below, and click "Send Application" when complete.

3.5 Additional Information Required for M-ID Credential to be issued

The Secure Systems credential application process requires both the Coordinator and the user applicant to provide the following information to acquire their M-ID credential: First Name, Middle Initial, Last Name, Social Security Number (SSN), Organization Name, Organization Tax ID Number (TIN), and Email Address (this is HUD Policy). You must select the "Organization" radio button in this step.

First Name: Middle Initial: Last Name: Social Security Number:				
Organization Information: • Provide the name of the H	UD-registered Org	anization o	r Individual you r	epresent
 Provide the Tax Identifica Organization or Individua Specify whether the HUD- Individual 	you represent. Do	o not enter (dashes.	-
Organization/Individual Name::				
TIN/SSN:				
Organization 🖲 Individual				
 Include your e-mail use example: jsmith 	Provide your e- r name, the @ sign @aol.com, johnd	n and [servi	cename.com/edu	
E-mail Address:				

Upon verification of all information provided, the Coordinator's M-ID will be assigned and mailed to the principal (or the designee) who registered their firm/organization in APPS.

Note: A firm/organization must first have a coordinator in place before the user can apply for their M-ID credential.

Note: It is possible to have up to four coordinators, and having at least one back is highly recommended.

Upon verification of all information provided, the user will be assigned an M-ID. The Coordinator will retrieve the user ID for their employee, ensure that the employee has access and roles, and complete the TIN assignment maintenance for the CNA e-Tool Version 3.2.

3.6 Responsibility of the Business Partner Coordinator

Multifamily Business Partner Coordinators will grant/revoke access and roles to the CNA e-Tool Version 3.2 through Secure Systems User Maintenance. This process also requires TIN assignment maintenance to be done. The only CNA e-Tool roles available to the Business Partner are *External Viewer* and *External Writer*.

Please see <u>Appendix D</u> to get more information on how the Multifamily Participant Coordinator will grant and maintain accounts for their employee users. The Multifamily Business Partner Coordinator is responsible for assigning roles and doing TIN assignment maintenance to their own M-ID and employee M-IDs within their own firm/organization. Before applying for an M-ID credential, the Multifamily Business Partner user should contact their Coordinator to let them know that they need CNA e-Tool roles and access.

3.7 Visual of the Business Partner Login Process

Once the Multifamily Business Partner user receives their M-ID and gets their account provisioned by their Coordinator, they access the CNA e-Tool Version 3.2 by logging into the Secure Systems Platform at the following URL: <u>https://hudapps.hud.gov/HUD_Systems</u>. After clicking the URL, the login process requires the M-ID and password to be entered before clicking the "Login" button.

ecure Systems	User Login	fag hein search home
Single Sign On	User I Passwor	
	 There is an inactivity timeout of 30 m There is a session timeout of 4 hours, where you left off. This computer system, and all the system 	Cancel e incorrect login attempts. to access Reset Password and other useful information. inutes. Plasse save your work periodically to avoid being logged out. Once reached, you will need to re-authenticate after which you can resume work teens associated with this system for User Authorization and Authentication, are teem; unauthorized access to these systems is not permitted; and usage may be
	Content updated May 21 2016 U.S. Department of Housing and Urban Da 45: 7th Street S.W., Weshington, DC 2041 Telephone: (202) 706-1112 TTY (202) 70	10

In the next step, the user will be redirected to the following page. Review this page in detail.

	User Login	Ing help search home logost	
Secure Systems			
		to maintain an active ID. If you do not login again before <u>19 May 3</u> iser ID is deactivated, please contact the TAC to reactivate your ID	
		Legal Warning	
	provisions of title 18, United State	through the HUD Secure Connection web site falls u s Code, Section 1030. This law specifies penalties fo , damage, or destruction of information residing on Computers.	or exceeding
		Warning Notice	
		ccess software supports Internet Explorer 7.0 brows hay not be compatible with this software.	er. Other
	M	essage of the Day	
	1	Welcome to Secure Systems	
		Accept	
	Content updated January 6, 2018	Back to Top	
	U.S. Department of Housing and Urban Develo 451 7th Street S.W. Washington, DC 20410 Telephone: (202) 708-1112 TTn (202) 708-14		

After clicking the "Accept" button, the user is redirected to the Secure Systems Main Menu, which will list links to all applications that the user ID is authorized to access. In the final step, the user must select the CNA e-Tool Version 3.2.



Note: All Multifamily Business Partner users and their coordinators should remember to log in to Secure Systems at least once every 90 days to ensure that their M-ID is not locked due to inactivity. Business Partners can access the CNA e-Tool application with their M-ID through Secure Systems at the following link: <u>https://hudapps.hud.gov/HUD_Systems</u>

PHA User Access

4.1 Getting Started For The PHA

To improve security (confidentiality and integrity), the PHA User and their Coordinator need a login credential and CNA e-Tool Role(s) to use CNA e-Tool. Version 3.2. Those applying for an M-ID login credential must know their five-digit PHA Code. Find your organization's PHA code at the following URL: <u>PHA Contact Information</u>.

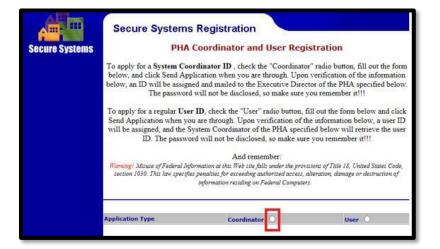
4.2 Credentials For The PHA User

After the M-ID is acquired, it will serve as the username going forward in Secure Systems.

The PHA User and their Coordinator require M-ID credentials to access CNA e-Tool. Version 3.2. **The Coordinator in the PHA provides access to the PHA User and assigns their roles.** The PHA Code provided during the M-ID application process makes the connection between the User and Coordinator. Therefore, every PHA User who applies for an M-ID must also know their Organization Code (PHA ID) before applying. If you do not have your PHA ID, click the following <u>link</u> to find out what it is.

4.3 How To Become a PHA Coordinator

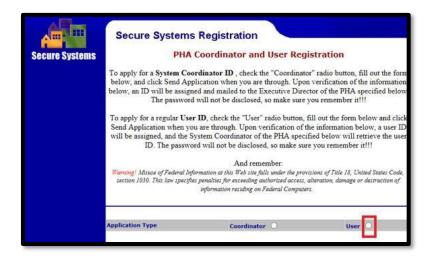
The PHA Coordinator applicant must go to the <u>Secure Systems PHA Application page</u> to apply to be a Coordinator for their organization.



To apply, the Coordinator must check the "Coordinator" radio button, fill out the form below, and click Send Application when complete.

4.4 How To Become a PHA User

The PHA user applicant must go to the <u>Secure Systems PHA Application page</u> to apply to be a user for their organization.



To apply, the user must check the "User" radio button, fill out the form below, and click "Send Application" when complete.

4.5 Additional Information Required For M-ID Credential To Be Issued

The Secure Systems credential application process requires both the Coordinator and the user applicant to provide the following information to acquire their M-ID credential: First Name, Middle Initial, Last Name, Social Security Number (SSN), Name of PHA, PHA Code for Organization ID, and Email Address (this is HUD Policy).

Application Type	Coordinator O		User O
First Name:			
Middle Initial:			
Last Name:			
Social Security Number:			
Organization Information:			
 Provide the name of the Provide the Number of the 			t
Organization Name:			
Organization ID:			
	Provide your e-mail a	ldress.	
	er name, the @ sign and [: h@aol.com, johndoe@ad		
E-mail Address:			

Upon verification of all information provided, the Coordinator's M-ID will be assigned.

Note: A PHA must first have a coordinator in place before the user can apply for their credential.

Once Secure Systems verifies all information provided, they will assign the PHA user an M-ID. The PHA Coordinator will retrieve the ID for their employee and ensure that they have access and the correct roles for the CNA e-Tool.

4.6 Responsibility of the PHA Coordinator

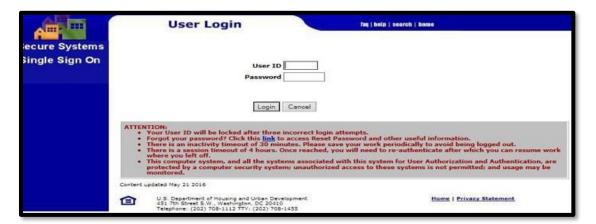
The PHA Coordinator will grant/revoke access & role and do PHA Assignment Maintenance for themselves, and their employee's through Secure Systems User Maintenance. The only CNA e-Tool Version 3.2 roles available are *External Viewer* and *External Writer*.

The PHA Coordinator is responsible for assigning roles and doing PHA assignment maintenance to their own M-ID and employee M-IDs for the PHA. Please see <u>Appendix D</u> to get more information on how the PHA Coordinator will grant and maintain accounts for their employees.

Before applying for an M-ID credential, the PHA user should contact their Coordinator to let them know that they need CNA e-Tool roles and access. After Secure Systems issues the M-ID, the system emails the user, informing them that their M-ID was issued.

4.7 Visual of the PHA User Login Process

Once the PHA user receives their M-ID and gets their account provisioned by their Coordinator, they can then access the CNA e-Tool by logging into the Secure Systems Platform at the following URL: <u>https://hudapps.hud.gov/HUD_Systems</u>. PHA Users and their Coordinators will log in with their M-ID and password.



In the next step, the user will be redirected to the following page. That page should be reviewed in detail.



After clicking the "Accept" button, the PHA user is redirected to the "Secure Systems Main Menu," which lists links to all applications that the user ID has been authorized to access. In the final step, the user must select the CNA e-Tool. 3.2.

Main Menu	faq help search home logout
Systems	
<u>CNA eTool</u>	

Note: All PHA Users should remember to log in to Secure Systems at least once every 90 days to ensure that their M-ID is not locked due to inactivity. PHA Users can access the CNA e-Tool with their M-ID through Secure Systems at the following URL:

https://hudapps.hud.gov/HUD Systems

4.8 Visual of the Owner User Set-Up Process

A firm/organization User:

- Security Systems (WAAS):
- 1. The applicant applying for their M-ID credential will need to provide all of the requested information required as part of the Secure Systems Registration Process.
- 2. The organization must have a user apply for the Coordinator user type.
- 3. The Coordinator will give their specific organization's users CNA e-Tool Property Owner Role (CHO) role through Security Systems User Maintenance.
- > FHA Connection (FHAC):
- 1. Get an FHA Connection issued M-ID by registering in FHA Connection (if they do not have an M-ID already).
- 2. The Owner should let their organization's Coordinator know if they want to have the Owner Role access (CHO) assigned to them for the CNA e-Tool.
- 3. The Coordinator will give their users CNA e-Tool Owner Role (CHO) role through the FHAC ID Maintenance.

Security Systems User Maintenance page:

1. Look up user by User ID or Name

Wer Maintenance - Netsca Ele Edit View Go Communic Damana / Sama / Sama		- 8
	System Administration bousing wall bolp search bound	
Secure Systems	User Maintenance	
	On this form, you can either search for a User by User ID, or search for Users by entering your search criteria.	
Welcome VICTOR	Search by User ID To search for a User by User ID, enter a User ID and then click the "Search for User" button. User ID	
system administration	Search for User	
administration Business Partners Maintenance PHA Assignment Maintenance Password Change User Maintenance	Search Users To search for a User, enter at least one search criteria and then click the "Search Users" button. First Name	
	Last Name	
	Check here to limit search to Independent Users	
systems	Search Users Cancel	
Elinancial Assessment Submission – PHA Citation – PHA Citation – PHA Citation – Constantian Subvectam – Multitaniky Heussian (FASS) Citation (FASS) Management Assessment Subvectam (FMAS) Stark – Criatista (FAS2)		

2. Assign CNA CHO role to the User

Assign/Unassign Roles for User MCNT20

User ID	MCNT20
First Name	FIRST - MCNT20
Middle Initial	
Last Name	LAST - MCNT20
User Staus	Active
Coordinator	Yes
User Type	Business Partner
sabled roles cannot be unassig propriate Assignment Mainten IATOO	ined until they are removed in the ance screens
ease check/uncheck boxes to a sabled roles cannot be unassig propriate Assignment Mainten (ATOO CNATOO = Capital Needs Asso	ined until they are removed in the ance screens
sabled roles cannot be unassig peropriate Assignment Mainten MATOO	ined until they are removed in the ance screens essment eTool
sabled roles cannot be unassig propriate Assignment Mainten <u>NATOO </u> CNATOO - Capital Needs Assi	ance until they are removed in the ance screens essment eTool ER
sabled roles cannot be unassig propriate Assignment Mainten NATOO NATOO - Capital Needs Asso CUR - USDA REVIEW	ance until they are removed in the ance screens essment eTool ER
sabled roles cannot be unassig propriate Assignment Mainten MATOO CNATOO - Capital Needs Asso CUR - USDA REVIEWI CUS - USDA SUPERVI	ined until they are removed in the ance screens essment eTool ER ISOR
sabled roles cannot be unassig propriate Assignment Mainten MATOO CNATOO - Capital Needs Asse CUR - USDA REVIEW CUS - USDA SUPERVI CUV - USDA VIEWER	essment eTool ER ESOR

Assign/Unassign Roles Cancel

Once the CHO role is assigned to the Owner, the new Owner should be able to login and access the CNA e-Tool. The Property Owner may or may not see existing assessments under their 'Owner's Desk' dashboard, as it is dependent on direct assignment by the initiator.

If the Property Owner expects to see a CNA under the Owner's Desk, please contact the person who initiated the assessments and complete the Owner assignment process to ensure the assessments display in the inbox.

* The user has more than one organization associated with their M-ID and cannot log in as an Owner in eTool.

4.9 Visual of the Owner User Access Process

Once the Owner user receives their M-ID and gets their account provisioned by their Coordinator, they can then access the CNA e-Tool by logging into the Secure Systems Platform at the following URL *after* the associated user can 'Add' an Owner to the Owner Assignment tab: <u>https://hudapps.hud.gov/HUD_Systems</u>.

Owner Settings	
📝 Owner Assignment	0
Owner Notes	0

User ID	Organizations	First Name	Last Name	Email
		Add Owners below.		
Wher Inform	ation			
ser ID		Email		
irst Name		Last Name		
		•		

As of January, 2025

PAE/MAC User Access

5. Getting Started For The PAE/MAC User

In order to get a credential all Participating Administrative Entities (PAE) or Multifamily Assessments Contractor (MAC) will need to register their firm in APPS based on their Tax Identification Number (TIN). To improve security (confidentiality and integrity), the PAE/MAC User and their Coordinator need a login credential and CNA e-Tool Role(s) to use CNA e-Tool Version 3.2.

PAE's working on applicable Mark-to-Market restructurings will access the CNA e-Tool through Secure Systems with their M-ID Credential. Credentials For The PAE/MAC User The very first thing a PAE should do is get a Multifamily Business Partner (M-ID) credential through Secure Systems. If you are unsure how to apply for an M-ID then please watch the following: <u>How to get your M-ID Tutorial.</u>

As part of the application process you will need to know your TIN. If you do not know your TIN contact your company coordinator for assistance before applying for M-ID. After the M-ID is acquired, it will serve as the username going forward in Secure Systems.

All PAEs will need to have designated Coordinator in Secure Systems. Coordinators are responsible for granting employees access to the CNA e-Tool through Secure Systems User Maintenance, providing them with their roles, and completing Participant Assignment Maintenance.

5.1 How To Become a Multi-Family PAE Coordinator

The PAE Coordinator applicant must go to the <u>Secure Systems MF Coordinator Application</u> <u>page</u> to apply to be a Coordinator for their organization.

Secure Systems Registration

MULTIFAMILY Coordinator and User Registration

To apply for a **System Coordinator ID**, check the "Coordinator" radio button, 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 CEO of the HUD-registered entity specified below. The password will not be disclosed, so make sure you remember it!!!

To apply for a regular User ID, check the "User" radio button, fill out the form below and click Send Application when you are through. Upon verification of the information below, a user ID will be assigned, and the System Coordinator of the HUD-registered entity specified below will retrieve the user ID. The password will not be disclosed, so make sure you remember it!!!

And remember:

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage or destruction of information residing on Federal Computers.

Application Type Co	oordinator 🔾	U	ser O
First Name:			
Middle Initial:			
Last Name:			
Social Security Number:]		
Organization Information:			
 Provide the name of the HUD-regis Provide the Tax Identification Num Organization or Individual you repi Specify whether the HUD-registere Individual 	iber or Social Secu resent. Do not ent	irity Number of the H er dashes.	IUD-registered
Organization/Individual Name::			
TIN/SSN:			
Organization \bigcirc Individual \bigcirc			

PAE Coordinators must select the "Coordinator" button, and the PAE employee must select the "User" button. The applicant applying for their M-ID credential will need to provide all of the requested information required as part of the Secure Systems Registration Process.

Once the PAE receives their M-ID from their coordinator, they can access the CNA e-Tool screen by signing on Secure Systems login screen and will be required to enter their User M-ID and current password.

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Note: Please notify **CNAaccess@hud.gov** of the M-ID and the name of your firm so that it can be added to the drop-down list of selectable PAE/MAC within the Version 3.2 User Interface.

6. HUD Employee Access

HUD employees (and contractors) will access the CNA e-Tool with their H-ID or C-ID through the Secure Systems website at the following URL: <u>https://hudapps.hud.gov/ssmaster</u>. Because Single Sign On (SSO) is enabled, they should not have to put in their H-ID or C-ID and Local Area Network (LAN) Password.

6.1 HUD Employee User ID and Login Overview

In rare instances, the SSO may not be operational. In that case, the HUD employee will have to input their H-ID or C-ID user name and LAN password to log in to the Secure Systems Platform and then the CNA e-Tool application.

6.2 Acquiring Access/Roles Process for HUD Employees

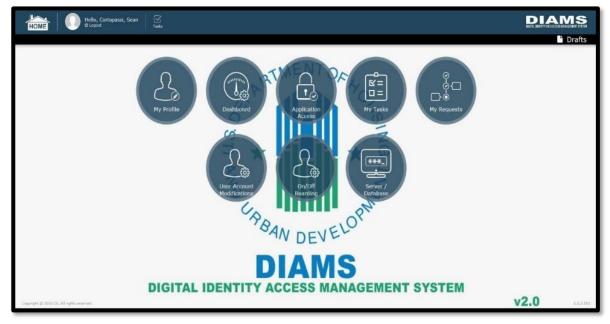
- 6.2.1 The H-ID/C-ID User who requires access should send an email to their supervisor or GTM and request that they submit a Digital Identity Access Management System (DIAMS) request on their behalf for the CNA E-TOOL - P282. The supervisor/GTM should state if their employee needs the viewer, reviewer, and/or supervisor roles. See below for a description:
- 6.2.1.1 **Supervisor Role:** a role typically reserved for HUD branch chiefs or directors who assign work to individual staff reviewers (i.e., underwriters, transaction managers, account executives, construction analysts), depending on their skill and the difficulty of the case. The supervisor is the only person entitled to "Approve," "Return," or "Undo Approval" of a CNA.
- 6.2.1.2 **Reviewer Role:** this role is for HUD staff reviewers (i.e., underwriters, transaction managers, account executives, construction analysts) who have the primary task of completing a review of a CNA and making it "ready for decision." Reviewers can reassign a CNA to another reviewer when they need help or need to give a case to another reviewer. The Reviewer is the primary "read-write" worker on the HUD side of the CNA discussion with external users. As part of Version 3.2, the reviewer can return a CNA without intervening action by a Supervisor.
- 6.2.1.3 **Viewer Role:** a viewer can see all CNAs but cannot write to any record, make any decision, or make an assignment.

As part of a HUD user's request, they should include their signed <u>Rules of Behavior</u> (ROB). The C-ID user should send an email to their Government Technical Monitor (GTM), include their signed ROB, and request that they submit a <u>DIAMS</u> request on their behalf for the CNA E-TOOL - P282. The supervisor/GTM should state if the contractor needs the Viewer, Reviewer, and/or Supervisor roles and email their employee's signed ROB to <u>CNAaccess@hud.gov</u>.

- 6.2.2 The requester's supervisor/GTM must also request Secure Systems- P104 access in DIAMS if the requesting H-ID User or C-ID User does not already have Secure Systems access. CNA e-Tool cannot grant roles/access until the user can access the Secure Systems Platform; thus, it is a mandatory dependency.
- 6.2.3 The requesting H-ID user's supervisor or C-ID User's GTM will submit all requests using DIAMS. All requests are permanently saved in DIAMS, which routes them to the designated approving official. The approving official is responsible for approving all application access requests. If the request is not approved within two weeks, the

supervisor/GTM should email <u>CNAaccess@hud.gov</u> for assistance.

6.2.4 The H-ID User or C-ID User and their requesting supervisor/GTM will receive an email once the approving official has completed the request for application access.



Note: HUD Federal and Contractor Employees must be authorized users of Secure Systems before acquiring access or using the CNA e-Tool. Secure Systems access requests must be submitted and approved first in DIAMS. Only after Secure Systems access is secured should the supervisor/GTM then request access for the CNA e-Tool.

6.3 How HUD Employees will Navigate Secure Systems

HUD employees will be able to log in to the Secure Systems Platform at the following link: https://hudapps.hud.gov/ssmaster/. The HUD employee must have Secure Systems Access, CNA e-Tool Access, and at least one CNA e-Tool Role in order to log in to the application. Single Sign-On should be enabled, but if it is not, then the user will need to put in their LAN password and H-ID or C-ID.

In the next step, the user will be redirected to the following page. That page should be reviewed in detail.



After clicking the "Accept" button, the user is redirected to the Secure Systems Main Menu, which lists links to all applications that the user ID has been authorized to access. The user must select the CNA e-Tool. 3.2.



7. Help Desk Support

7.1 FHA Connection Support

FHA lenders with Mortgagee IDs may receive assistance through the FHA Connection Help Desk email <u>sfadmin@hud.gov</u>. A lender terminated Mortgagee ID can only be reactivated by their own FHA Company Coordinator, not the FHAC Help Desk. If the FHA Lender needs to reset their FHAC Password, they should go to the following link: <u>FHAC Password Reset</u>. The password reset process requires the FHA lender's M-ID, Last Name, and Mother's Maiden Name, and they must click the "Send" button. As a default, the lender's password is reset to the last six digits of their Social Security Number.



Note: The FHA lender should remember to log in to both FHA Connection and Secure Systems at least once every 90 days to ensure that their M-ID is not locked due to inactivity.

When the FHA lender updates their FHA Connection password, it will automatically prompt the Secure Systems password to be reset. If the lender runs into issues, then they should first clear their cache.

7.2 Secure Systems support

Help desk support for users who have issues with Secure Systems is provided by The Public and Indian Housing (PIH), Real Estate Assessment Center (REAC), Technical Assistance Center (TAC). The help desk can be reached by phone at 1-888-245-4860 from Monday through Friday, 7:00am - 8:30pm EST. Their website is the following URL:

https://www.hud.gov/program offices/public indian housing/reac/support/tac.



90 Days of Inactivity in Secure Systems: All IDs become inactive and go into terminated status (requiring reactivation) after 90 days of inactivity (not logging into Secure Systems). This policy applies to every User Credential: H-ID, C-ID, and all M-IDs.

Multifamily Business Partners and PHA Users: may be prompted to change their Secure Systems Passwords. If the Multifamily Business Partner or PHA User's Secure Systems password needs to be reset, they should go to the following <u>link</u>. Users should enter their M-ID, First Name, Last Name, Social Security Number, Mother's Maiden Name and click the "Reset Password" button.

*	Secure Systems
U.S. Dept. of Housing and Urban Development	RESET PASSWORD *Please note that all of the following fields are required.
	User ID
	First Name
	Last Name
	Social Security Number
	Mother's Maiden Name
	Your New Password will be sent to your current email address in Secure Systems. Reset Password

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HUD Employee Secure Systems reactivation: If the H-ID or C-ID Holder's credential becomes terminated due to inactivity in Secure Systems, the user should email their supervisor or GTM and ask them to submit a DIAMS request. The supervisor/GTM must select Secure Systems-P104 reactivation and not the CNA e-Tool. If the Secure Systems Team does not reactivate the H-ID or C-ID's account within two weeks, email <u>CNAaccess@hud.gov</u> to let the System Administrator know.

Secure Systems Independent User Registration is not authorized: Independent users can Register and acquire an Independent ID Credential in Secure Systems. However, the CNA e-Tool Version 3.2 places restrictions on this credential, and no CNA e-Tool user should get an Independent ID to access the system. The Independent ID lacks the PHA Code or a TIN and therefore does not offer the level of security and accountability required to match the system's security requirements. Independent IDs have another limitation in that another user will not be able to access the CNA associated with that PHA Code or TIN if the user retires or their account gets terminated. If a user has an active Independent ID and wants to use the CNA e-Tool Version 3.2, they should terminate that ID and apply to be a Multifamily Participant Business Partner or PHA User.

7.3 HUD Employees Support

Help desk support for H-ID and C-ID users with issues with their Local Area Network (LAN) Password or their DIAMS requests may contact the HITS National Help Desk at 1-888-297-8689.

7.4 Tiered Support from the System Administrator

Tier I: If an FHA Lender, Multifamily Business Partner, or PHA User has an access issue, they should first go to their Coordinator for assistance. Likewise, HUD employees should first contact their supervisor or GTM for assistance.

Tier II: The next step is to contact the respective help desk (FHA Connection, Secure Systems, or the HITS National Helpdesk). In addition, the <u>CNA e-Tool Ask-A-Question Help Desk</u> is used for addressing business or policy-related questions and can also assist with general access-related questions.

Note: Sometimes, after resetting a password, the user computer's cache needs to be reset. Before contacting Tier III support, the user should reset their cache to see if that remediates the issue.

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Tier III: <u>CNAaccess@hud.gov</u> is for trouble-shooting technical support for access-related issues and should only be contacted if the problem cannot be resolved at the Tier I or Tier II Levels. Please note that CNAaccess can not assign roles or provide user IDs for external users, only HUD staff.

8. Important Notes about User Access

8.1 Personally Identifiable Information (PII)

During the registration and password reset process, users may be required to provide their Social Security Number (SSN) and mother's maiden name to complete the registration or password reset process in Secure Systems or FHAC. Users may have concerns about providing this information on the Internet and wonder why the forms require this sensitive personally identifiable information (PII). According to government regulations, the User's SSN is required when trying to access a Federal computer system. HUD requires the SSN and mother's maiden name to verify identity before processing the registration or password reset forms. The information is being entered into a secure environment and is used exclusively for the registration or password reset process.

Emailing PII: A user's SSN, Tax Identification Number (TIN), and mother's Maiden Name is PII. PII is protected by the Privacy Act of 1974, as amended (5 U.S. Code 552a). It is the user's duty and responsibility to safely and securely transmit and communicate PII. Placing SSN, Mother's maiden name, and TIN in the body of an email is not a secure way to transfer this information. We suggest whenever submitting a request with PII, it should be in a password-protected document, and then the password should be sent separately.

8.2 Sharing Passwords and Credentials

Users should never share their password or credential information with anyone (even if it is within their own firm or organization), as this would violate security regulations. Sharing passwords increases the number of threats to HUD Systems and could potentially jeopardize users' PII. If it is determined that misuse of a credential has occurred, there will be penalties, and future access/credentials may be revoked.

Appendix A: How to Become an FHA-approved Lender

New lender applicants must complete an <u>online application</u> and attach the <u>required</u> <u>documents</u> in accordance with the <u>FHA Housing Policy Handbook</u> (Handbook 4000.1). In addition to submitting the required documentation, all lenders must confirm compliance through the <u>Initial Certification Statements</u>. In the event of negative responses, applicants must provide an explanation and supporting documentation in response.

Lenders must successfully complete the certification process before the potential user can apply for credentials/ a Mortgagee ID. Once the Mortgagee account is created, the credentials will automatically expire after 90 days.

There are four types of FHA lender approval:

- 8.2.1 **Nonsupervised Mortgagee:** Lending institutions may apply for this type of approval if they want to: originate, underwrite, close, endorse, service, purchase, hold, or sell FHA-insured Mortgages.
- 8.2.2 **Supervised Mortgagee:** Banks, savings banks, and credit unions may apply for this type of approval if they want to: originate, underwrite, close, endorse, service, purchase, hold, or sell FHA-insured Mortgages.
- 8.2.3 **Government Mortgagee:** Federal, state, or municipal government agencies, Federal Home Loan Banks, Freddie Mac, or Fannie Mae may apply for this type of approval if they want to: originate, underwrite, close, endorse, service, purchase, hold, or sell FHA-insured Mortgages.
- 8.2.4 **Investing Mortgagee:** Organizations that want to invest funds under their control may apply for this approval if they wish to purchase, hold, or sell FHA-insured Mortgages. An Investing Mortgagee may not originate, underwrite, or close FHA-insured Mortgages in its name or submit applications for FHA mortgage insurance.

Help Desk Support for Lenders

Lenders with questions who are currently preparing or planning to apply for FHA approval in the near future may contact the FHA Resource Center at <u>answers@hud.gov</u> or (800) 225-5342.

Appendix B: How new Needs Assessors Firms Register in APPS

If a Needs Assessor firm has not already done so, they will need to register their firm/organization in the Active Partners Performance System (APPS). <u>APPS</u> allows any firm/organization to provide their previous participation information directly to HUD for processing via the Internet. Click this <u>link</u> to find out how to get a TIN. Those who need to register can go to the following URL: <u>APPS Registration Page</u>. They will need to provide firm/organization name, Nine digit TIN, legal structure, Ownership Type, Address, City, State, Zip, Country, Phone, and Email address. See below for an example:

	Business Partner Registration HUD Multifamily
	For Coordinator or User Registration go to the Secure Systems Registration page.
TIN:	er (no dashes)
SSN:	or (no dashes)
Confirm TIN/SSN:	123456789 (no dashes) Check if SSN is used as TIN for Sole Proprietor or
	Revocable Trust
	Submit

Then proceed to the next step:

Company Name:	Hondale Engineering	1
TIN:	00000001	
Legal Structure:	Limited Liability Company (LLC)	
Type of Ownership:	Profit Motivated V	
	Physical delivery address	
* Address:	451 Pth Street SW	
* City:	Washington	
* State:	DISTRICT OF COLUMBIA	
Zip Code:	20024 .	
Country:	USA V	
	If country not United States	
	Territory:	
	Postal Code: 20009]
* Phone:	202-402-4001	
Fax:		
* E-mail:	Email@hud.gov	×
Cell Phone:		

If successful, you will not get an error message. Next, APPS will notify the requestor that the submission was received and will be processed overnight. The Principal/Owner who registered must determine who within their firm/organization will be their Coordinator, and they will have to wait at least 48 hours for APPS to process the TIN. Next, have the Coordinator you have selected: register for their M-ID at the following URL: <u>link</u>.

Note: Only after the Coordinator registers will the letter be mailed to the address during the APPS registration process. The letter will provide the Coordinator with their M-ID. After the M-ID is known, please notify **CNAaccess@hud.gov** of the M-ID and the name of your firm so that it can be added to the drop-down list of selectable Needs Assessors within the Version 3.2 User Interface.

Appendix C: Multifamily Business Partner Coordinator Responsibilities

The very first step for the Coordinator is to log in at the following URL: <u>https://hudapps.hud.gov/HUD_Systems</u>.

Next, the Coordinator must put in their user M-ID and Password.

Next, the Coordinator clicks "User Maintenance."



The screen will look as shown below:

	User Maintena			
On this form, you can either a by User ID, or search for Use				
	Add New Use			
To add a new User to Secure			button.	
	Add (N)ew Use			
	Search by User	ID		
To search for a User by User enter a User ID and then clic	ID,			
anter a user 10 and then the	User ID	In the second se	This?	
	(S)earch for Use		e trade.	
	Search User			
To search for a User, enter at and then click the "Search Us To limit your search and resp If you do not select a User Ty	least one search criteri ers" button. onse time, select a User	a Type or l		
and then click the "Search Us To limit your search and resp	least one search criteri ers" button. onse time, select a User	a Type or l		
and then click the "Search Us To limit your search and resp	: least one search criteri sers" button. ionse time, select a User rpe, then you must enter User Type e following search criter SN, or PHA ID to list Bu ation to list Inspectors O loyer Identification No.	a Type or l at least ia. siness Pa R	tners OR	search c
and then click the "Search Us To limit your search and resp If you do not select a User Ty You may enter only one of th Enter the participant's TIN, S enter the Inspection Organiz enter the AQA Contractor Em	Least one search criteri ers" button. onse time, select a User rpe, then you must enter User Type following search criter SN, or PHA DD to list Bus ation to list Inspectors G ployer Identification No Lenders.	a Type or l at least ia. siness Pa R	tners OR	search c
and then click the "Search US To limit your search and resp If you do not select a User Ty You may enter only one of th Enter the participant's TIN, S enter the Inspection Organiz enter the AQA Contractor Em enter the Mortgage ID to list Business Partner - TIN	Least one search criteri ers" button. onse time, select a User rpe, then you must enter User Type following search criter SN, or PHA DD to list Bus ation to list Inspectors G ployer Identification No Lenders.	a Type or l at least ia. siness Pa R	tners OR	search c
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and then click the "Search Us to limit your search and resp If you do not select a User Ty You may enter only one of th Enter the participant's TIN, Se enter the Inspection Organiz enter the AQA Contractor Em enter the AQA Contractor Em Business Partner - TIN Inspec	Least one search criteri sers' button. onse time, select a User rpe, then you must enter the select and the select e following search criter SN, or PHA to to list Use ation to list Inspectors G ployer Identification No Lenders. /SSN/PHA ID/IPA ID ctor - Organization ID	a Type or l at least ia. siness Pa R	tners OR	search c
and then click the "Search Us to limit your search and resp If you do not select a User Ty You may enter only one of th Enter the participant's TIN, Se enter the Inspection Organiz enter the AQA Contractor Em enter the AQA Contractor Em Business Partner - TIN Inspec	Least one search criteri ers" button. onse time, select a User py then you must enter User Type following search criteri SM, or PIA ID to list buy land to tail stangestors (SSN/PHA ID/IPA ID /IPA ID/IPA ID /SSN/PHA ID/IPA ID AQA Contractor - EIN Lender - Mortgage ID	a Type or l at least ia. siness Pa R	tners OR	search c
and then click the "Search Us To limit your search and resp If you do not select a Uwer Ty You may enter only one of the Enter the participant's TIN, Search Enter the Age Contractor En- meter the Age Contractor En- meter the Age Contractor En- Business Partner - TIN Inspec	Least one search criteri res" button. onse time, select a User per, then you must enter User Type following search criter SM, or PHA ID to list Buspectors S ployer Identification No Lenders. /SSN/PHA ID/IPA ID tor - Organization ID AQA Contractor - EIN Lender - Mortgage ID First Name	a Type or l at least ia. siness Pa R	tners OR	search c
and then click the "Search Us To limit your search and resp If you do not select a Uwer Ty You may enter only one of the Enter the participant's TIN, Search Enter the Age Contractor En- meter the Age Contractor En- meter the Age Contractor En- Business Partner - TIN Inspec	Least one search criteri ers" button. onse time, select a User py then you must enter User Type following search criteri SM, or PIA ID to list buy land to tail stangestors (SSN/PHA ID/IPA ID /IPA ID/IPA ID /SSN/PHA ID/IPA ID AQA Contractor - EIN Lender - Mortgage ID	a Type or l at least ia. siness Pa R	tners OR	search c

Next, within the User Maintenance screen, enter the user M-ID or can put in the First and Last Name and click "Search Users."

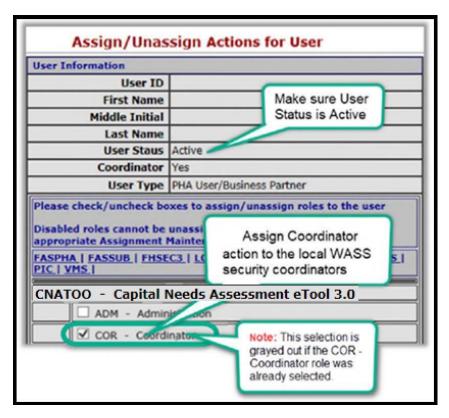
	aintena	nce	
On this form, you can either search for a User by User ID, or search for Users by entering you	ur search c	riteria.	
	The second second		
To search for a User by User ID,	by User	ID	
enter a User ID and then click the "Search for	User" butt	on.	
User	ID	What's This?	
(S)ea	rch for User		
10/00			Search by User ID
			<u> </u>
Con	rch Users		
To search for a User, enter a search criteria (o			or
and then click the "Search Users" button.			and the second
Business Partner - TIN/SSN/PHA ID/IPA ID		What's This?	Search by User Name
First Name			Could by Ober Hame
Last Name	<u> </u>		
User Status		V What's This?	
User status		Added Build and Address of State	
	Check her	re to limit search	to Independent Users
		Cancel	

This will provide a User List, and you will need to click the M-ID.

Next: the User information appears.

User Informat	ion		
User ID			
First Name			
Middle Initial			
Last Name			
User Status	us Active		
Coordinator	Yes	_	
User Type	PHA User/Business Pa		.
Choose a Fund	tion		Select "Maintain
Business Partners Maintenance			er Profile- Actions' :lick Submit
Maintain User	Profile - Actions	-	
Maintain User Resend Letter	Profile - Roles		

Next, click on the "Choose a Function" drop-down menu, select "Maintain User Profile – Actions" and "Submit."



Next, click the Select "Assign/Unassign Actions."

Please check/unche	eck boxes to assign/unas	sign actions to the user
CNATOO		
CNATOO - Capit	al Needs Assessment eT	ool 3.0
ADM -	Administration	
COR -	Coordinator	
Assig	n/Unassign Actions	ancel

Syst	em Administration
	Successful Transaction You have successfully assigned/unassigned action(s) to user
	OK

Next, select "OK" and confirm CNA e-Tool Coordinator has been selected.

A	System Adr	ninistration	-	hg help search hense legre
Secure Systems		Maintain Us	er MWAS90	
		User Information	encores (
IN WILLIAM MIDDRSON		User ID	MILLARIO .	
and the second second		First Name	WILLDAM	
		Middle Initial	A	
administration		Last Name	ANDERSON 1	
Review Partners		User Status	Active	
27A Assignment Participator		Coordinator	Yes	
This Assessment		User Type	Business Partner	
Farlis gant Assessment		Choose a Function		
Paterson Change		Business Partners M	tentenance 😪 😪	
BAT Organization				
Assignment Paintenance User Maintenance		Subrat	Garcel	
Advertations				
CATTON AND A CATTON				
ChA slast				
Estatical Assessment Substances P35				
CLAMPIA) Cleancial Assessment				
Subsystem Hubblassily meaning (CASSIN)				
Ancient J. Parlaments Confection and Reputty				
Sustain USPEAKS) Line of Credit Control				
Tuelan (AUDICA) Public Hearing				

Next, the system will take you back to the "Maintain User" info. Here is an example of how it will look.

User Informat	ion	
User ID		
First Name		
Middle Initial		
Last Name		
User Status	Active	
Coordinator	No	
User Type	PHA User/Business Partne	er
Choose a Fund	tion	
Maintain Llaar	Profile - Actions	Select "Maintain User Profile - Roles' & click Submit

Next, you will need to select Maintain User Profiles – Roles.

Next, on the "Choose a Function" drop-down menu, select "Maintain User Profile – Roles" and "Submit."

Disabled r	eck/uncheck boxes to assign/unassign roles to the user roles cannot be unassigned until they are removed in the te Assignment Maintenance screens
CNATOO	- Capital Needs Assessment eTool 3.0
	CUR - USDA REVIEWER
	CUS - USDA SUPERVISOR
	CUV - USDA VIEWER
	CXV - EXTERNAL VIEWER
	CXW - EXTERNAL WRITER
	Assign/Unassign Roles Cancel

Next, under the headings going down, check the CNA e-Tool Roles for the user. You should only select CNA e-Tool: External Viewer and/or External Writer.

6690 Role Code CXV	Role Description EXTERNAL VIEWER
CXV	· · · · · · · · · · · · · · · · · · ·
	EXTERNAL VIEWER
CXW	EXTERNAL WRITER
unassign.	ancel
	unassign.

Next, Once the CNA e-Tool Roles are chosen, Select "Assign/Unassign Roles."

Next, select "Confirm" to confirm all the roles selected.

Syste	m Administration	faq i
	Successful Tra	ansaction
	You have successfully assigned/una	ssigned role(s) to user
	OK	

Next, select "OK."

Next, the system will take you back to the "Maintain User" info.

Next, click on the drop-down list

Am: m	System Adm	inistration	1	he inde i search i heme i legert
Secure Systems		Maintain Us	er MWA890	
		User Information	0.000	
OTHE WILLIAM ANODRSON		User ID	Sector includes in a sector in a	
and the second second		First Name		
system		Middle Initial		
administration			ANDERSON T	
Basiness Partners Partners		User Status	Active	
SPA Assignment Participates		Coordinator	Yes	
FISA Assegament		User Type	Business Partner	
Earlisquel Assignment		Choose a Function		
Paterionanua Tassaviri Danas		Business Partners M	tentenance 🖓	
BAP Organization				
Assignment Hamfanance		Frank Street		
Case Presidential		Submit	Garcel	
-				
agateres				
Active Stationers Performance System CATTRO				
CRA slast				
Estational Assessment Subscreen. 2004				
(CAMPIA) Eleancial Assessment				
Enloysium Hubblashily meaning (2855/8)				
Incluse 3 - Parlamence				
Exaluation and Registry Southern LINTEARSU				
Line of Credit Control Technik (ACCCE)				
Public, Hearing Assessment, Suctions				

Click on the "Choose a Function" drop-down menu, select **"Participant Assignment Maintenance,"** and **"Submit." It will look as follows.** Note you will not be able to do TIN Assignment Maintenance until the CNA e-Tool 3.2 roles are first granted (this is a mandatory dependency).

	System Administration by here (most) here (here) here	
Secure Systems	Maintain User MWA890	
	Over Information	
AVAILABLE MAN AND PARTY OF	Over ID PREADO	
1	First Name WILLIAM	
	Middle Initial A	
administration	Last Name ANDERSON I	
Residence Partiers Residence	User Status Active	
Baintenand	Coordinator Yes	
Ent.Assignment	User Type Dustress Pertree	
Paintenant Assignment	Chunte a Function	
Fauntetern	E Duranteens Frighteens Manufactures	
AAT.Disectories	Mantan User Indonesion Mantan User Profile - Actors	
Antigement Paratanance	Mantan User Profile - Groups	
Contraction of the	Maritan User Probe - Roles	
	Participant Assignment Maintenance Feosord Letter	
Ailen Fachara		
Fishermanice Swellers		
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Housing (1850/6) Sectors 1 . Performance		

Next, on the "Assignment Maintenance," enter the User's M-ID in the User ID field. Under "Choose a Function," Select the **"Assign Participant"** option and click the **"Submit" button.**

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Next, on the "Assignment Maintenance," enter the User's M-ID in the "User ID" field. Under "Choose a Function," Select the **"Assign"** option and **"Submit."**

Next, under role description, select one or both of the CNA e-Tool roles. Only two roles are available for CNA e-Tool 3.2. They are External Viewer (CXV) and/or External Writer (CXW).

	System Administration by here been been
Secure Systems	Assign Participant for User MWA890[WILLIAM A. ANDERSON I]
NEW WILLIAM ANDERSON	Role Description (Partice 10 - Bak Code)
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Example of the three-step process for the Business Partner Coordinator

As of January, 2025

Step 1: **Highlight** the two CNA e-Tool roles. You should only select CNA e-Tool: External Viewer (CXV) and/or External Writer (CXW).

Step 2: **Highlight** your (TIN) in the lower half under Participant Name.

Step 3: Select "Submit" to complete the process.

Next, the Coordinator will get a confirmation screen. Select "Confirm."

	System Administration	n Nimel	assettb (bases) legest
ocuro Systems	Assign Participant Confirmati	ion for User MWA890	WILLIAM A. ANDERSON
	User Information		
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and the second second		First Name WILLIAM	
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witem. desiration		Last Name ANDERSON	
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Next: Select "OK."



Set-up is complete. Any new role assignments or action within User Maintenance takes two (2) business days to be effective.

Help Desk Support for Multifamily Business Partner Coordinators

Support for issues with the assignment process is provided by The Public and Indian Housing (PIH), Real Estate Assessment Center (REAC), Technical Assistance Center (TAC). The help desk can be reached by phone at 1-888-245-4860 from Monday through Friday, 7:00am - 8:30pm EST.

Appendix D: PHA Coordinator Responsibilities

The very first step for the Coordinator is to log in at the following URL: <u>https://hudapps.hud.gov/HUD_Systems</u>.

Next, the Coordinator must put in their user M-ID and Password.

Next, the Coordinator clicks "User Maintenance."



The screen will look as shown below:

System Administration	fag help search hon
User Mainten On this form, you can either add a new User, search	
by User ID, or search for Users by entering your sea	
Add New Us	er
To add a new User to Secure Systems, click the 'Add	
Add (N)ew Us	
Search by Use	r ID
To search for a User by User ID, enter a User ID and then click the "Search for User"	hutten
User ID	What's This?
(S)earch for Us	
Search User To search for a User, enter at least one search criter	
and then click the "Search Users" button.	
To limit your search and response time, select a Use If you do not select a User Type, then you must enter	
	~
User Type	
User Type You may enter only one of the following search critte Enter the participant's TIN, SSN, or PHA ID to list & enter the Inspection Organization to list Inspectors enter the AQA Contractor Employer Identification N enter the Mortgage ID to list Lenders.	usiness Partners OR OR
You may enter only one of the following search crite Enter the participant's TIN, SSN, or PHA ID to list B enter the Inspection Organization to list Inspectors enter the AQA Contractor Employer Identification N	usiness Partners OR OR
You may enter only one of the following search crite Enter the participant's TIN, SSN, or PHA ID to list B enter the Inspection Organization to list Inspectors enter the AQA Contractor Employer Identification N- enter the Mortgage ID to list Lenders.	usiness Partners OR OR o. to list AQA Contractors OR
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You may enter only one of the following search orig Enter the participant's TIN, SSN, or PHA ID to list B enter the Impection Organization to list Inspectors enter the AQA Contractor Employer Identification M enter the Mortgage ID to list Lenders. Business Partner - TIN/SSN/PHA ID/IPA ID Inspector - Organization ID AQA Contractor - EIN Lender - Mortgage ID	usiness Partners OR OR o. to list AQA Contractors OR
You may enter only one of the following search crite Enter the participant's TIN, SSN, or PHA 10 to list B enter the LAS Contractor Employer Identification N enter the Morgage ID to list Lenders. Business Partner - TIN/SSN/PHA 1D/IPA 1D Inspector - Organization ID AQA Contractor - EIN Lender - Mortgage ID Additional search criteria.	Usiness Partners OR OR . to list AQA Contractors OR What's This?
You may enter only one of the following search crite Enter the participant's TIN, SSN, or PHA 10 to list B enter the Inspection Organization to list Inspectors enter the AQA Contractor Employer Identification N enter the Mortgage ID to list Lenders. Business Partner - TIN/SSN/PHA 1D/IPA 1D Inspector - Organization 1D AQA Contractor - EIN Lender - Mortgage ID Additional search criteria. First Name	Usiness Partners OR OR o. to list AQA Contractors OR <u>What's This</u> 2
You may enter only one of the following search crite Inter the participant's TIN, SSN, or PHA 10 to list B enter the Inspection Organization to list Inspectors enter the AGA Contractor Employer Identification N enter the Mortgage ID to list Lenders. Business Partner - TIN/SSN/PHA ID/IPA ID Inspector - Organization ID AQA Contractor - EIN Lender - Mortgage ID Additional search criteria. First Name Last Name	usiness Partners OR OR o. to list AQA Contractors OR What's This?

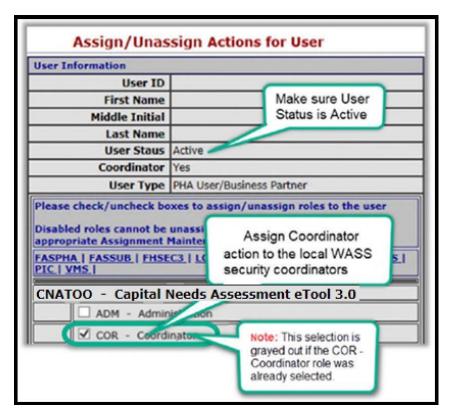
Next, within the User Maintenance screen, enter the User ID and "Search for User."

User Ma	aintena	nce	
On this form, you can either search for a User by User ID, or search for Users by entering you	ir search ci	riteria.	
Search	by User I	D	
To search for a User by User ID, enter a User ID and then click the "Search for U	User" butto	in.	
User I	D	What's This?	
(S)ean	ch for User		Search by User ID
Search To search for a User, enter a search criteria (op and then click the "Search Users" button.	ch Users ptional)		or
Business Partner - TIN/SSN/PHA ID/IPA ID		What's This?	Search by User Name
First Name			ood on by obor mane
Last Name			
User Status	AJI	What's This?	
	Check her	e to limit search	to Independent Users
	ers C	ancel	

Next: the User information appears.

ess Pa
Select "Maintain
User Profile- Actions" & click Submit

Next, click on the "Choose a Function" drop-down menu, select "Maintain User Profile – Actions" and "Submit."



Next, click the Select "Assign/Unassign Actions."

Please check/uncheck boxes to assign/unassig	n actions to the user		
<u>CNATOO</u>			
CNATOO - Capital Needs Assessment eTool 3.0			
ADM - Administration			
COR - Coordinator			
Assign/Unassign Actions Can	cel		

Syst	em Administration
	Successful Transaction You have successfully assigned/unassigned action(s) to user
	OK

Next, select "OK" and confirm CNA e-Tool Coordinator has been selected.

Am. 111	System Adm	ninistration		he help search hense legre
Secure Systems		Maintain Us	er MWA890	
		User Information	0.000.000	E
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and the first states of the		First Name	WILLDAM	
10000		Middle Initial	A	
administration		Last Name	ANDERSON T	
Baumeas Partners		User Status	Active	
27A Assignment		Coordinator	Yes	
TISA Assegment		User Type	Business Partner	
Farlisment Assessment		Choose a Function		
Taxonica Change		Business Partners N	tenteninos 💎	
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Public Hearing Assessment Sociom				

Next, the system will take you back to the "Maintain User" info. Here is an example of how it will look.

Next, you will need to select Maintain User Profiles – Roles.

User Informat	ion	
User ID		
First Name		
Middle Initial		
Last Name		
User Status	Active	
Coordinator	No	
User Type	PHA User/Business Partner	r
Choose a Fund	tion	
Maintain User Maintain User Maintain User	Profile - Actions	Select "Maintain User Profile - Roles" & click Submit

Next, on the "Choose a Function" drop-down menu, select "Maintain User Profile – Roles" and "Submit."

Please check/uncheck boxes to assign/unassign roles to the user Disabled roles cannot be unassigned until they are removed in the appropriate Assignment Maintenance screens <u>CNATOO</u>
CNATOO - Capital Needs Assessment eTool 3.0
CUR - USDA REVIEWER
CUS - USDA SUPERVISOR
CUV - USDA VIEWER
CXV - EXTERNAL VIEWER
CXW - EXTERNAL WRITER
Assign/Unassign Roles Cancel

Next, under the headings going down, check the CNA e-Tool Roles. There are only two options you can select for CNA e-Tool: External Viewer (CXV) and/or External Writer (CXW).

Next, Once the CNA e-Tool Roles are chosen, Select "Assign/Unassign Roles."

Next, select "Confirm" to confirm all the roles selected.

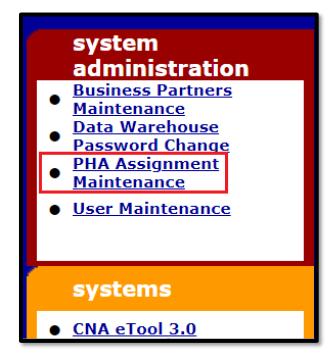
Assign/Unassign Role Confirmation for User				
Roles to Assign to User M96690				
System Code	Role Code	Role Description		
CNATOO	CXV	EXTERNAL VIEWER		
CNATOO	CXW	EXTERNAL WRITER		
No roles were selected to unassign.				
	Confirm	ancel		

Next, select "OK."

System Administration
Successful Transaction
You have successfully assigned/unassigned role(s) to use
OK

Next, the system will take you back to the "Maintain User" info.

Important: Next, Go to the System Administration menu on the left and select "PHA Assignment Maintenance." The Assignment Maintenance Process for PHA Coordinators.



The PHA Coordinator must select PHA Assignment Maintenance as shown above. Note you will not be able to do PHA Assignment Maintenance until the CNA e-Tool 3.2 roles are first granted (this is a mandatory dependency).

	System Administration beine been been
Secure Systems	Participant Assignment Maintenance
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Actas Fatura Actas fatura Conceasus Juston CATR3	

As of January, 2025

The Coordinator must put in the PHA user's M-ID and scroll down to View or Unassign Participant and select submit.

Next, on the "Assignment Maintenance," enter the User's M-ID in the User ID field. Under "Choose a Function," Select the **"Assign Participant"** option and click the **"Submit" button.**

	System Administration by big starts beau legel
Secure Systems	Participant Assignment Maintenance
	User ID (MWARD)
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system administration	Submit Garoel
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-	
Active Parliance Performance System Colores	
· ShAalad	
Contractive Comptionations Submitteense Transisti Assessmentani Technickeense	

Next, on the "Assignment Maintenance," enter the User's M-ID in the "User ID" field. Under "Choose a Function," Select the **"Assign"** option and **"Submit."**

It will appear as follows:

and the second se	se a Role:	
Role	Description (Cystem ID Role Code)	_
	CNA ETOO External Viewer and/or External Writer	
	Query (LOCCS - QRY)	Highlight "
	Utilization and Expense Data Submitter (VMS - UDE)	Viewer (CXV)
-		and/or
	se at least one PHA: ID - PHA-Neme	Writer (CXW)
	PHA Code - PHA Name	
		Highlight 2 your PHA code and PHA name

Example of the three-step process for the PHA Coordinator

Step 1: **Highlight** the two CNA e-Tool roles at the top. You should only select CNA e-Tool: External Viewer (CXV) and/or External Writer (CXW).

Step 2: **Highlight** the PHA Code in the lower half.

Step 3: Select "Submit" to complete the process.

Next, the Coordinator will get a confirmation screen. Select "Confirm."

A	System Administration	IN INC	eeanch beene hogest
ecure Systems			
	Assign Participant Confirmat	ion for User MWA590	WILLIAM A. ANDERSON I
	their Information		
WW WILLIAM AND COURSE	and the second sec	User ED MILARIO	
A CONTRACTOR OF		First Name WILLIAM	
		Midelle Initial A	
opsiem administration		Last Name ANDERSON	
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hangtment Hambonature			
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Instruct Accessment	1000	and the state of t	Contraction of the second seco
Indecestron - Platitiando			
Inclusion 2 - Participance			
Sectors (1975,885)		Confirm Canoel	

Syste	m Administration
	Successful Transaction You have successfully assigned/unassigned role(s) to user

Next: Select "OK."

Set-up is complete. Any new role assignments or action within User Maintenance takes two (2) business days to be effective.

Help Desk Support for PHA Coordinators

Help desk support for PHA Coordinators who have issues with the assignment process is provided by The Public and Indian Housing (PIH), Real Estate Assessment Center (REAC), Technical Assistance Center (TAC). The help desk can be reached by phone at 1-888-245-4860 from Monday through Friday, 7:00am – 8:30pm EST.

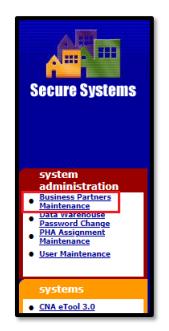
Appendix E: How to become a PHA Consultant

Note if a credentialed M-ID user (non-coordinator Business Partner) wants to become a PHA consultant, they will need to follow these steps in Secure Systems. This is outside the purview of the CNA e-Tool, but these instructions are provided as a courtesy.

Start of Process: Talk with the PHA Coordinator and let them know they will need to follow these steps to make your M-ID a consultant to their PHA.

Step 1: The PHA Coordinator must log in to Secure Systems with their active M-ID and password at the following: URL

Step 2: They must select: Business Partner Maintenance



Step 3: Put in the consultant's M-ID and select: Add New/Delete Existing Relationship. See example:

Busine	ss Partner	s Maintenance
Please enter	a User Id:	
User ID	MWA890	What's This?
Please enter	a Function:	
Add New/De	lete Existing Re	lationships 🗸 What's This

Step 4: Type in the PHA ID. On the drop-down, make sure it says "PHA," and click submit

Step 5: The PHA mailing address will be sent a code by post. The code is required to activate the relationship for the consultant. This will ensure the M-ID is connected to that PHA going forward.

Step 6: PHA Assignment Maintenance is still required if the PHA wants the consultant to Initiate, prepare, and/or submit a CNA within the CNA e-Tool Version 3.2.