MTW Supplement Module – Helpful Information and Tips
(HUD Users)

Contents:

Overview

The purpose of this document is to help HUD staff with how to use the MTW Supplement module within the Housing Information Portal (HIP). The MTW Supplement module contains the HUD-50075 MTW, MTW Supplement to the Annual PHA Plan, form that is used by MTW Expansion PHAs. While HIP is built on the Salesforce platform and you will see references to it at times, it is a custom application, so you should refer to it as HIP, not Salesforce.

System Requirements

Users **must** use a web browser other than Internet Explorer, such as Google Chrome, Microsoft Edge, or Safari, to access this system. **Internet Explorer is not supported.** If you are unsure what your default web browser is, use the instructions in the Checking your Default Web Browser job aid on the HIP Training page.

Helpful Information and Tips

The items in this section are provided to help you as you navigate and work in the HIP MTW Supplement module.

Known System Issues

A list of the issues known to exist in the HIP MTW Supplement module are contained in a document on the HIP Training page and will be updated as needed. Please look at this document prior to reporting any issues.

Accessing the System

- Login page: https://hud.my.salesforce.com/
- You must use a web browser other than Internet Explorer (IE). This system has worked well in Microsoft Edge and Google Chrome on HUD computers, but the Salesforce platform generally supports other browsers that are not IE as well. Additional information can be found in the Checking your Default Web Browser job aid on the HIP Training page.
- When you receive your account activation email, you must click the link within 24 hours. If you have problems with activating your account, please use the information provided in the Technical Assistance document on the HIP Training page.
- HIP utilizes Single Sign On (SSO) for HUD staff, which means that you will not have a separate username and password for HIP. Due to the usage of SSO, if you are on the VPN or on the HUD network in a HUD office, you will be taken directly into the system. If you are not on the HUD network, you will need to enter your HUD email address and LAN (network) password). More information about SSO is available on the HIP Training page, including information about how SSO works if you are on the HUD network versus not on the HUD network.
- Users who do not log in to their HIP account for 90 days or more will be automatically deactivated. Information on how to have your account reactivated if you have a current need to access the system can be found in the "Getting Started with the MTW Supplement Module" job aid on the HIP Training page.
- To log out of the system when you are finished with your session, click on the icon in the upper right-hand corner of the page and then click on Logout (the icon may have a little animal face on it).

Navigation

- Bookmarks – it is okay to bookmark the login page (https://hud.my.salesforce.com/), but it is not recommended that you bookmark pages within the system.
- On the Housing Information Portal (HIP) landing page (the HIP MTW Supplement module is part of this larger project):

- You will only need to use the MTWS Form Submissions tab at the top of the page. This is where all forms from PHAs in your field office will be listed.
  - The Accounts tab is where PHAs that are loaded into the system are displayed. *In Salesforce platform, the term Account is synonymous with the PHA name.* It is best to stay out of this tab at this time. You **should not** attempt to make any edits to this list.
  - The Contacts tab is where contacts, including users, from each PHA are listed. This is not like HA Contacts in IMS/PIC at this time and you should not go under this tab. **Do not attempt** to do anything with this list since it could cause problems for PHAs.
  - The Reports and Dashboard tabs will be used to list reports and dashboards that have been created. **Any existing items should not be edited or filtered by users since the changes will affect all users if not done correctly.** At a future date, additional reports may be created for use by field offices. If users are familiar with how to create their own personal use reports, they can do so.

- Do **not** use the Back, Forward, or Refresh buttons in your web browser to navigate the system.
  - When using the View Form link to view a form, use the Next and Previous buttons to navigate between pages of the form. You will not see a Previous button on every page in Section C due to the complexity of the navigation.

- Due to the amount of data to be displayed, wait a few seconds before trying to access links after a page loads. You may also see an indication on the screen that the page is working on loading.

- If you have navigated away from the MTWS Form page and need to get back to it, on many pages there is a breadcrumb in the upper left-hand corner to get back to it, like the one pictured below, that will contain the form number. You can also click on the down arrow on the MTWS Form Submissions tab at the top of the page and select the form number from the list of "Recent records" that appears.

MTWS Form Submissions > MTWS Form - 00032

File Uploads

- PHAs can upload PDF or Word documents. No other file types are accepted.
- Files should be named with the following naming convention:
  - PHA code, Fiscal Year (FY), and short name for the policy/item.
  - Some examples would be:
    - CA789FY21RentHardship for a rent hardship policy
    - CA789FY21ImpactAnalysis for an impact analysis that is applicable to multiple MTW activities
    - CA789FY21MTWCertofCompliance for the MTW Certifications of Compliance.

- PHAs should not upload files under the Related tab unless told to do so by HUD. Currently, the only situation when a PHA would do this is if instructed in the PHA known issues list. Every file uploaded while completing the form is associated with a "content type" (e.g., hardship policy). When files are uploaded under the Related tab, they are not associated with a "content type" and, therefore, will **not** appear anywhere on the form itself as a PHA is working on it.

Returning a Form to a PHA for Modification

If a PHA has submitted a form and it needs to be returned to them so that they can make modifications to it, the field office point of contact (POC) should contact their desk officer in the MTW office and request that the form be returned for revisions. Only certain HUD staff in the MTW office can take this action in the system to protect the integrity of the data and to prevent unintended actions from being taken. An email notification will go out from the system once the status of the form has been updated. Further information on email notifications can be found in the Email Notifications section of this document.

Email Notifications

The system will generate automatic email notifications when the status of an MTW Supplement changes in the system. Those messages will be sent to the user at the PHA that submitted the form, the MTW Supplement mailbox, the MTW office desk officer, and the field office POC. At this time, we cannot add other contacts to the system.

The notifications will be sent when:

- The form is submitted by the PHA
- The MTW office has changed the status of the form to Returned for Revision
- The MTW office has changed the status of the form to Conditional Approval
- The MTW office has changed the status of the form to Final

If the field office POC does not receive the email notification and it is not in their spam folder, please make sure that the MTW office desk officer is aware of the change in field office POC. The email addresses for the email notifications must be manually updated in HIP by a system administrator. This is done when the system administrator is notified of a change by the MTW office.

Currently, only the field office POCs can have access to HIP due to license restrictions. If the POC does not have access or had access that was inactivated, their PIH Director can follow the instructions in the "Getting Started with the MTW Supplement Module" job aid on the HIP Training page to request that new access be added or access be reactivated for a staff member.

Document Update Information

        The information below will provide users with details on what has changed in this document over time. If it has been a little bit since you viewed the document, this will help you know what may have changed.

Items Updated	Date Updated
• Moved information and tips information to its own document.	06/05/2024
• Updated the information about how often a user must access to the system before they will be deactivated in the Accessing the System section.	04/01/2024
• Updated the information in the Accessing the System section to reflect accounts will be deactivated after 75 days of inactivity. • Updated information on documenting REAC TAC representative that is spoken to in the Technical Assistance section.	02/06/2024
• Added information about accounts being made inactive after 90 days to the Accessing the System section.	12/11/2023
• Updated the Accessing the System section to remove references to HIP having a password for HUD users.	12/04/2023
• Added information on how a form can be returned to a PHA. • Updated information in Email Notifications section about how the email addresses for the automatic email notifications are updated.	08/03/2023
• General look of the document updated and wording tweaked as necessary to incorporate the template being used for all HIP training materials. • Update links to location of training materials to point to the HIP Training page. • Other clarifications based on user feedback.	03/14/2023
• Updated various areas of the document as needed to reflect that MTW Supplement is a module within the Housing Information Portal (HIP).	03/02/2023
• Corrected reference to HIP MTW Supplement module for consistency in Technical Assistance section	02/28/2023
• Updates throughout the document to related to the implementation of Single Sign On (SSO) in HIP instead of a username and password. • Other updates as needed.	02/10/2023
• Clarifications in various sections, including references to the system.	01/23/2023

Items Updated	Date Updated
• Updated the information about passwords in the Accessing the System section, including information about storing passwords in a user's web browser. • Clarified information about the Accounts and Contacts tabs in the Navigation section. • Added information about how the field office POC information is maintained in HIP in the Email Notifications section.	11/23/2022
• Clarified the instructions under Downloading a PDF of the Form to emphasize that users should give the system time to generate the file before attempting to open it.	05/24/2022
• Updated the Viewing the Form section to include some additional information about the system and clarified that users should go to the Viewing the Form section after initially accessing a submission.	05/12/2022
• Updated the Email Notifications section with the updated list of statuses that generate automatic email notifications. • Updated the File Uploads section to mention when PHAs should use the Related tab to upload files.	03/14/2022
• Added additional information to the Technical Assistance section about contacting the REAC TAC via phone. • Moved the Helpful Information and Tips section toward the front of the document so that users can reference it prior to starting to work in the system.	02/07/2022
• Clarified in the Navigation section that users should not attempt to make any edits/changes in the Accounts, Contacts, Reports, and Dashboards tab.	01/18/2022
• Updated the MTW Expansion Field Office Training and Resources SharePoint page links to reflect that OPHI's site collection has been migrated to SharePoint Online. ***Note the documents are no longer at this location – see 03/14/2023 update notes.*** • Updated the Technical Assistance section to include additional information that users should include when requesting assistance from the REAC TAC.	12/20/2021

Items Updated	Date Updated
• The Email Notifications section has been updated to reflect the updated list of who receives the email notifications. • The Technical Assistance section has been updated to provide some additional details on how to get assistance with the system. • The Appendix: Checking your Default Web Browser section has been updated to clarify some of the information due to the recent update to HUD computers to make Microsoft Edge the default browser. • Added information to step 2 in Accessing an MTW Supplement Form Submission for if a user does not see the link. • Clarified role of Salesforce in the introduction on page 2.	11/30/2021
• Moved the items relating to obtaining system access and how to setup the initial password to a separate document. • Added a sub section with information about how to view a list of known issues to the Helpful Information and Tips section. • Moved the information about how to determine your default web browser to the appendix and deleted the Please Read – Which Web Browser to Use section. • Reorganized the document for ease of finding information.	08/13/2021
• Added clarification on the Table of Contents page about why you may see references to Salesforce. • Added the Please Read – Which Web Browser to Use section to provide additional information about the proper web browser to use with the system. • Added information in the Helpful Information and Tips Navigation section about bookmarking pages in the system.	06/15/2021