MTW Supplement Module – Working with Forms
(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.

Accessing an MTW Supplement Form Submission

Note: Before you proceed any further, make sure to read the information in the Helpful Information and Tips job aid on the HIP Training page so that you will be better understand what you see in the system. You can also reference this section if you have questions as you navigate the system.

1. Login to HIP by going to https://hud.my.salesforce.com/ in a web browser other than Internet Explorer. Since HIP uses Single Sign On (SSO), you should click on the "Log in with Employee Login" link. 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.
2. From the HIP MTW Supplement landing page, look for the MTWS Form Submissions link in the row of tabs at the top of the page and click on it.
    *   If you are unable to see the MTWS Form Submissions link, follow the "Required Setup the First Time You Login to the System" section in the "Getting Started with the MTW Supplement Module" job aid available on the HIP Training page.
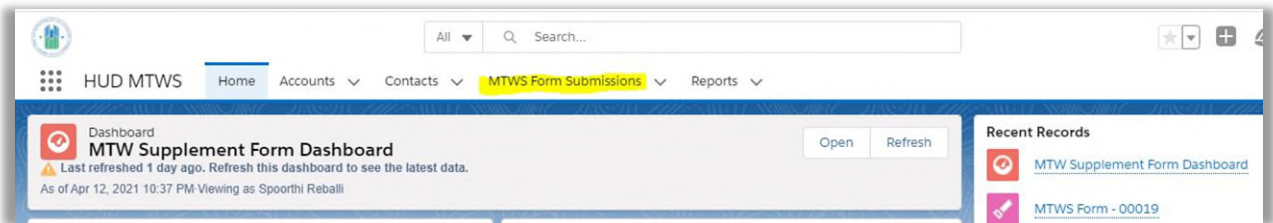
3. On the MTWS Form Submission Page, you can look for the form number, if you have it, or you can use the Account column to look for the name of the agency you want to access the form for.
    *   If you do not see the Account column, you will need to change your view to All. To do this, use the drop down under the title "MTWS Form Submissions" in the upper left corner to select All. You can then use the pushpin to the right of that selection to make All your default view.
    *   If the PHA has more than one form, you can use the Status and Modified Date columns, amongst others, to narrow down the form you are looking for.
4. Click on the form number in the first column labeled MTWS Form Submission Name to open the form. The MTWS Form page for the desired form will appear.

5. Continue to the [Viewing the Form](#) section for the next steps for viewing the data in the form.

Viewing the Form

There are two ways to view the MTW Supplement an agency has submitted. You can either view a read only version of the form within the system or you can download the form into a PDF file. Information about both methods and their uses is below. Any files that a PHA has uploaded into the system must be accessed separately and are covered in the Downloading Uploaded Files section of the Working with File Attachments job aid on the HIP Training page.

View Form Link

This is a read only version of the form in a similar format to how it appears on a PHA's screen when they are filling it out. You will use a Next button to navigate forward through each section or Previous to go backwards. This format is best if you just want to view something quickly on your screen.
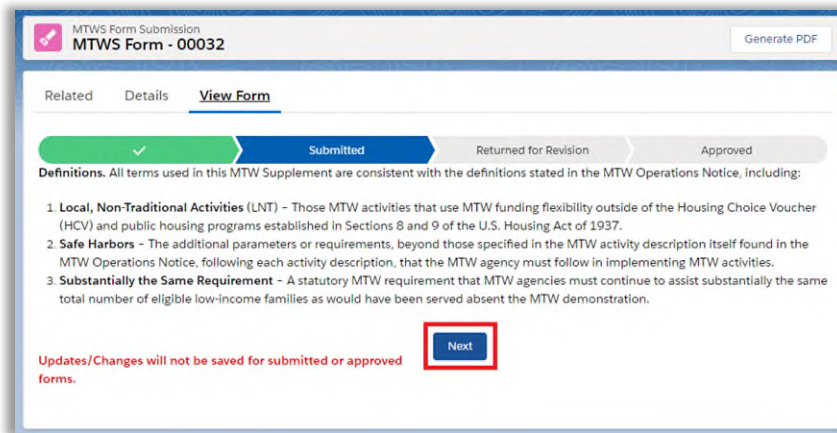
If you are not already in a form, use the instructions in the Accessing an MTW Supplement Form Submission section of this document to navigate to the form you wish to view.

Notes:
- Per the known issues list, there are know issues with the formatting of some pages of the form.
- There is a delete icon next to the download icon for file uploads, please **DO NOT** click on the delete icon because it will delete the file even though HUD staff should **NOT** be able to able to delete file attachments.
- While there will be a submit button on the last page of the form, if you click on it, you will get a message that states only a PHA can submit a form. Therefore, please do not click on it.

1. From the MTWS form page, you can navigate through the form in the system by clicking on the View Form link at the top of the page.
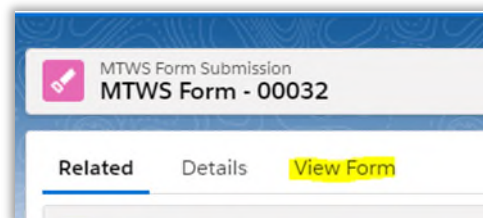
2. The MTWS Form page will show the View Form page. You can begin to navigate the form using the Next button. You will not be able to edit the form. Forms in submitted or approved status will be read only.

3. If a PHA has uploaded a file and you want to download it while viewing the form, you can click on the download icon to the right of the information for the file.
   - As mentioned above, please do NOT click on the delete icon!
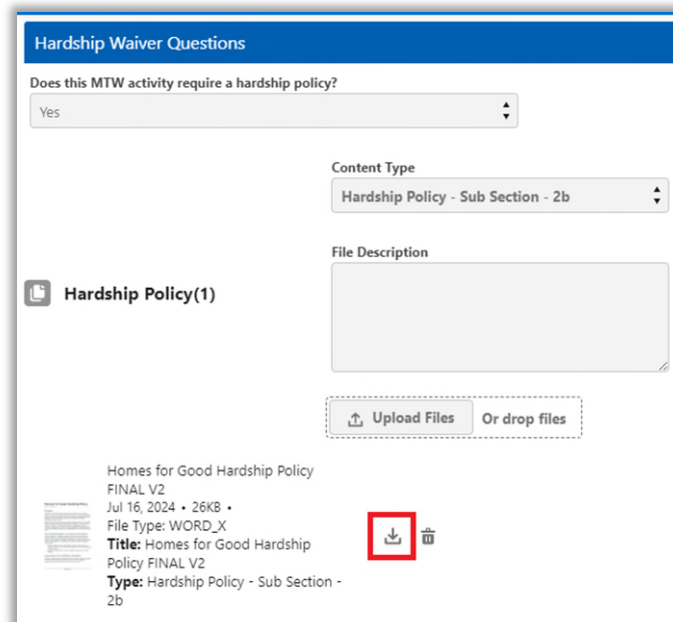
Downloading a PDF of the Form

Downloading a PDF of the form is the recommended way to review the MTW Supplement submission. This way you do not have to worry about the system timing out or having to navigate through each screen of the form on the screen. This is also the format that will be posted to the MTW website once the MTW Supplement is approved.

If you are not already in a form, use the instructions in the [Accessing an MTW Supplement Form Submission](#) section of this document to navigate to the form you wish to view.

1. On the MTWS Form page, click on the Generate PDF button in middle of the of the screen toward the top of the page.
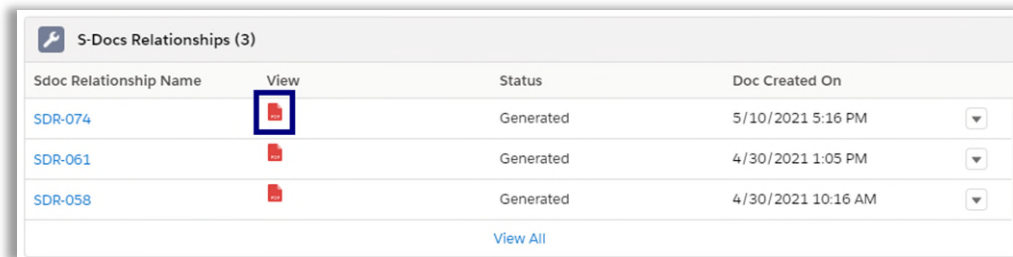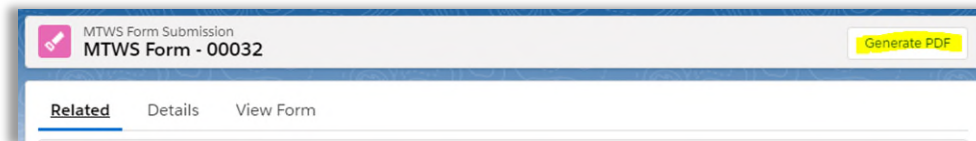

2. A box will be displayed over top of the MTWS Form page (you will still see it in the background) that states the job has been submitted to generate the PDF. Click on the Finish button to go back to the MTWS Form page.


3. You must wait a few minutes to let the system finish generating the PDF file before you continue with these instructions. *This is especially important for forms that contain many waivers and activities.*

4. Scroll down the MTWS Form page until you see the "S-Docs Relationships" heading. A number representing the number of generated PDFs will also appear in parenthesis next to this heading. The first file will be the one you requested.
   - If date and time under the "Doc Created On" column it does not say the current date and a time near the current time, it may be that the form has several waivers and activities in Section C. **Do not use your browser's Refresh button to refresh the page.** Click on the Related tab at the top of the page to refresh the page. 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 you are currently viewing from the list of "Recent records" that appears.

5. Click on the red PDF icon in the View column to open the PDF in a new tab of your browser.
   - If your form has several waivers and activities selected in Section C and you did not wait a few minutes before continuing, when you open the file, you may only see a partial file (not all the sections will be included). Close the file and wait a few minutes to let the

system complete the process. You do not need to navigate away from the page. After a few minutes, click on the PDF icon again and the full form should populate in the PDF file.

- If you see a message that says "unique error" you may have opened the PDF file too soon after generating it. Close the tab and wait a few more minutes before opening the file again.
- If you clicked on the file name under the "Sdoc Relationship Name" column and it took you to another page, this same icon is also on that page and will work the same way.

S-Docs Relationships (3)				
Sdoc Relationship Name	View	Status	Doc Created On	
SDR-074	📄	Generated	5/10/2021 5:16 PM	▼
SDR-061	📄	Generated	4/30/2021 1:05 PM	▼
SDR-058	📄	Generated	4/30/2021 10:16 AM	▼
	View All			

6. From here you can save the file to your computer or print it as you normally would.

MTWS Questions Section

When you are in a form, you will see a section of the page labeled MTWS Questions. This is how the PHA's responses to questions are stored in the system as they fill out the fillable form. This section is not coded to be a way you view the data that the PHA included on the form. You can click on the links for the questions, but it is not recommended as the main way to review the Section C information from the form due to the labels on the page that will open, especially for the custom questions, not always having clear labels. You should use one of the two methods described above to view the PHA's submitted responses as much as possible.

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
• Updates to the Viewing the Form section to reorder the content now that the View Form functionality is fixed.	08/28/2024
• Moved information about working with forms 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