



MTW Supplement Module – Working with File Attachments (PHA Users)

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Overview

The purpose of this document is to help PHAs with how to use the Moving to Work (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.

Please read this document before attempting to do any work in the HIP MTW Supplement module.



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](#).

Agreeing to the HUD Rules of Behavior and Privacy Act Statement

All users must agree to the HUD Rules of Behavior (HUD RoB) and Privacy Act Statement to access this system. This statement is displayed after a user successfully enters their user credentials on the login screen.

Working with File Attachments

One of the ways that HUD obtains information from PHAs as part of their MTW Supplement form is through files that are attached to the form. It is imperative that users read and follow the instructions in this document to ensure that their submission contains the most recent version of each document and does not contain multiple copies of each file. When a form is approved, this will mean that the final version of a document is included as well.

Important Information about Working with Files

Following the information provided below will assist both PHAs and HUD staff with working with files that are uploaded as part of an MTW Supplement form.

- Files should be named with the following naming convention. Do not include spaces and punctuation in files names.
 - **Naming convention:** PHA code, Fiscal Year (FY), and short name for the policy/item.
 - Some examples are listed below but the main thing is that the file name should not be long and should be clear about what the file contains:
 - 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
- Upload one file at a time. If you upload multiple files at once, the upload will not be successful.
- You can upload PDF or Word documents. No other file types are accepted.
- The size limit for an individual file is 25 MB.
- Do not upload files directly under the Related tab unless it meets the criteria under the [Uploading Documents with Additional Information](#) section. If you upload a file using the instructions in this section instead of uploading a file within the applicable area of the form, they **will not** be connected to the specific area of the form that it pertains to, which is referred to as the “content type”. For example, the system will not know that the file you uploaded is a “hardship policy” if you do not upload it under the hardship policy question for an activity. A file uploaded under the hardship policy question is given the “hardship policy” content type. **Uploading files under the Related tab that need to be connected to a “content type” could also cause you to receive validation errors on the form.**

File Validations in the System

Some of the areas in the system that ask for files to be uploaded will show you a validation error if you do not upload a file. Some examples are hardship policy, impact analysis, and Section D, Safe Harbor Waivers, and Section E, Agency-Specific Waivers, amongst others.

Uploading Files

There are two ways to upload files into the MTW Supplement form – browse for the file on your computer or drag and drop. While there are a couple more steps in the “browse” method, this is the method that most users are used to from working with other websites and applications. Both will result in the file being uploaded if the user receives the confirmation message.


Note about Hardship Policy and Impact Analysis File Uploads

If you upload a file under one activity and it is applicable to another activity you **must** keep the following in mind:

- In the picklist that asks if the activity requires a hardship policy or impact analysis, it will have the three options Yes, No, and Provided Already.
 - For the first activity the hardship policy or impact analysis is applicable to, you will answer Yes and answer any subsequent questions and upload your file. In the picklist that asks if it applies to more than this MTW activity, you will select each of the other activities that it applies to. You do not have to select the activity you are currently providing information for.
 - For the other activities that the hardship policy or impact analysis is applicable to that you selected in the picklist described above, you **must** select Provided Already or you will receive the validation message that asks you to upload a file. **You should not answer no to the question about if a hardship policy or impact analysis is required.**
 - You will not use the Provided Already response if you did not select the activity from the picklist described above in another activity.

Upload a New Document

1. To upload a file, decide whether you want to browse for the file on your computer or drag and drop it into the system using the file explorer window. **Please ensure that your file name uses the naming convention described in the File Uploads section of the Helpful Information and Tips job aid on the on the [HIP Training page](#).**



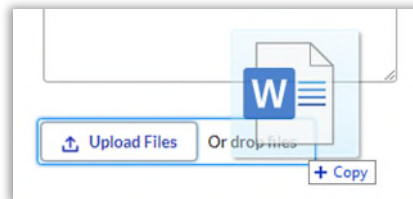
The screenshot shows a web form for uploading a document. On the left, there is a file icon and the text 'Hardship Policy(0)'. On the right, there is a 'Content Type' dropdown menu with 'Hardship Policy' selected. Below that is a 'File Description' text box. At the bottom right, there is a red-bordered button area containing two options: 'Upload Files' (with a small icon) and 'Or drop files'.

2. **Section E only, Agency Specific Waivers, only (other sections skip to the next step):** Enter a **brief** description of the file in the text box labeled File Description **before** you upload the file.

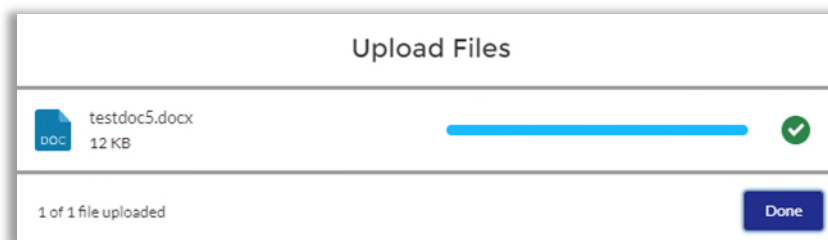
The file description is what you will be used in future years for Section E.2. *You can leave the File Description blank in all other sections.*

3. **Browse method:** Click on the Upload Files button. A new window will open. Use this window to browse for the location you have saved the file in. Single click on the file name once you locate it and click on the Open button (alternatively you can double click on the file name).

Drag and drop method: Open the file explorer window (in Windows use the Windows key plus E at the same time). Navigate to the location of the file. Click on the file name and while holding down the left mouse button drag it to your web browser window that has the HIP MTW Supplement module in it and let go of the mouse button once you see a blue box appear around the area where it says, "Upload Files or drop files".



4. Once you have either browsed for the file and dragged and dropped it, you will see a message titled Upload Files and shows you the progress of the upload. Once the upload is complete, it will show a green circle with a checkmark. Click on the Done button to go back to your form.



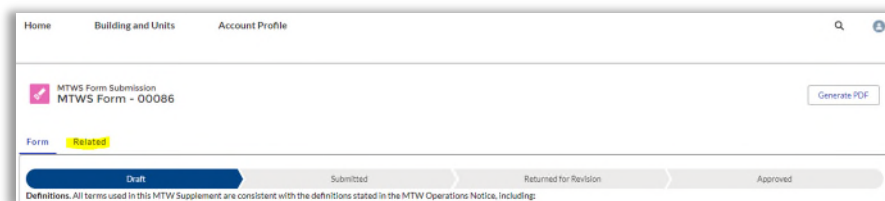
5. The area of the page will refresh and will show your file has been uploaded. If you need to upload additional files, repeat the steps in this section.



Uploading Documents with Additional Information

There could be times when you want to provide additional information that was not specifically requested on the MTW Supplement form. **Only in these cases will you use the instructions below.** If you upload a file using these instructions instead of uploading a file within the applicable area of the form, they will not be connected to the specific area of the form that it pertains to, which is referred to as the “content type”. For example, the system will not know that the file you uploaded is a “hardship policy” if you do not upload it under the hardship policy question for an activity. A file uploaded under the hardship policy question is given the “hardship policy” content type. **If you upload a file under the Related tab, you will not be able to connect it to a specific area of the form later.**

1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.

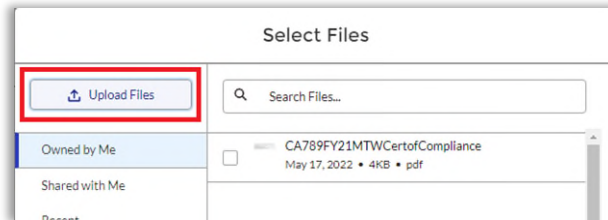


2. The first section on the MTWS Form Submission page is the Files heading. On the same line as the Files heading is a button labeled “Add Files”, click on it.



3. At the top of the screen that appears, find the Upload Files button in the top left corner, and click on it. You’ll be presented a Browse window to find your file on your computer and upload

it. **You must ensure to use the file naming convention listed in the [File Uploads](#) section so that HUD can identify what activity the file is for!**



4. After you have found the file on your computer and selected it for upload, the system will tell you when the upload has been completed. Click on the Done button to confirm the file has been uploaded. The screen will disappear, and you will see your uploaded file in the Files list. Repeat this process for any additional files.

Delete an Existing File

Some of the reasons that you may need to delete a file from your form are because you uploaded a file in error or HUD has asked you to revise a file. You may also need to delete a file if you revise the contents of the file so that you only have the most recent version in the system. Method 1 is the recommended method since most of the time users will need to upload a new version of the document after deleting the old version.

If you are not already in the form, use the instructions for accessing an existing form in the Working with Forms job aid on the [HIP Training page](#) to open the form you wish to delete an existing file from.

Note about Section D, Safe Harbor Waivers, and Section E, Agency-Specific Waivers

If you upload a file for a Safe Harbor Waiver or Agency-Specific Waiver request and later need to remove all requests from that section (e.g., all your Agency-Specific Waiver requests), you will need to:

1. Use in the instructions in [Method 1](#) below to delete the file or files that were previously uploaded.
2. Change the response to the first question from Yes to No. **Failure to change the response to this question back to No will cause you to receive a validation error because the system will be looking for a file to be uploaded.**
 - Section D: Will the MTW agency submit a request for approval of a Safe Harbor Waiver this year?
 - Section E: Will the MTW agency submit a request for approval of an Agency-Specific Waiver this year?

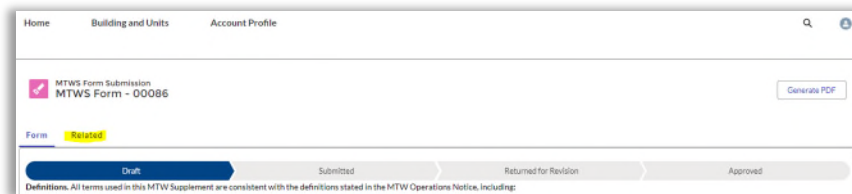
Method 1 – Deleting from Where it was Uploaded in the Form (Recommended)

1. On the MTWS Form Submission page, navigate to the place in the form where you uploaded the file (e.g., a hardship policy for activity 1.c).
2. Below the Upload Files button and to the left, you will see the file you previously uploaded. To delete the file, click on the trash can icon. You will get a pop-up message that asks you to confirm that you want to delete the file. Click OK to confirm. The page will refresh, and you will no longer see the file.

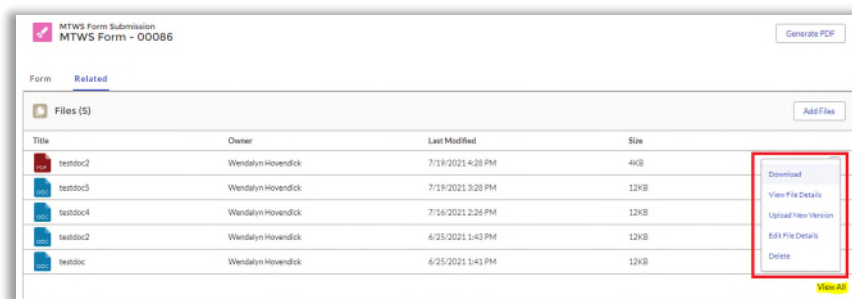


Method 2 – From the Related Tab

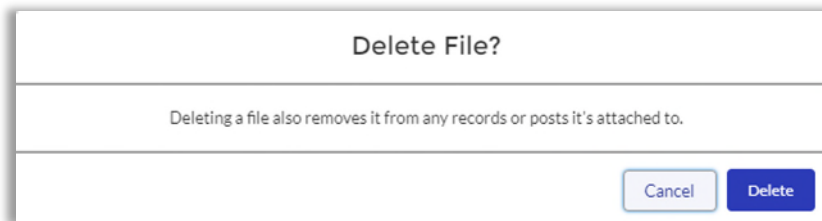
1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.



2. The first section on the MTWS Form Submission page is the Files heading. Next to the heading will be a number in parenthesis to tell you how many files have been uploaded to the system. To delete a file, find the file name in the list and single click on the down arrow on the right side of the line for that file. A menu will appear.
 - If you do not see the file you want to delete in the list, you can click the View All link that is found in the bottom right-hand corner of the section.



3. Click on the Delete option to delete the file. A Delete File confirmation message will appear. Click on the Delete button to confirm deletion of the file.



Revise an Uploaded Document

If you need to revise a file that you have attached to your form or if HUD has requested a revision to a file that was uploaded (i.e., correct the content of an uploaded file), you will need to do two things to complete this process. **It is important to do both things in the order stated so that only the correct version of each file is in the system and that there are not multiple copies of a file.**

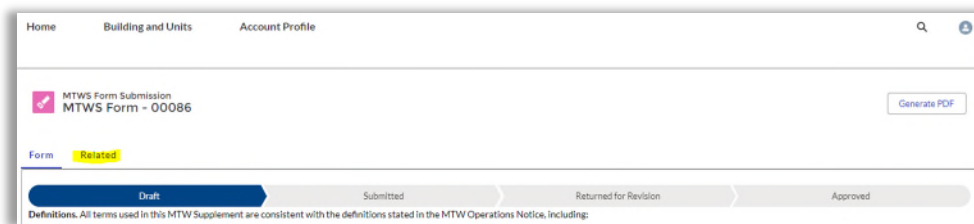
1. Delete the old version of the form from where it was uploaded in the form. Use the steps for [Method 1](#) in this document to complete this. *Note, you should not use Method 2 unless you previously uploaded the file as other information that is not associated with one of the questions in the form that asks for a file upload.*
2. Upload the updated document to the place in the form where it belongs (e.g., hardship policy). Follow the instructions under "Upload a New Document" in this document to upload the revised file.

Downloading Uploaded Files

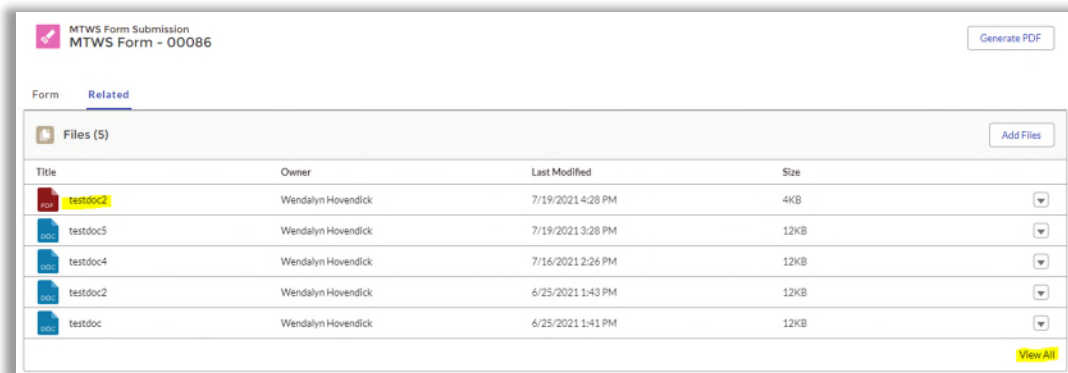
If you need to download a copy of a file you previously uploaded to the system, you can use the following steps.

If you are not already in the form, use the instructions for accessing an existing form in the Working with Forms job aid on the [HIP Training page](#) to open the form you wish to download files from.

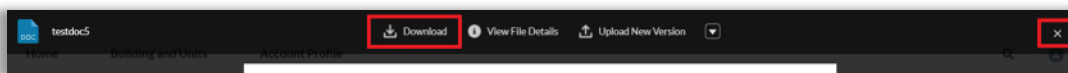
1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.



2. The first section on the MTWS Form Submission page is the Files heading. Next to the heading will be a number in parenthesis to tell you how many files have been uploaded to the system.
3. To download a file, start by clicking on the file name.



4. You will see a preview of the file's contents over top of the MTWS Form Submission page. Click on the Download button at the top in the top middle of the screen to download the file.

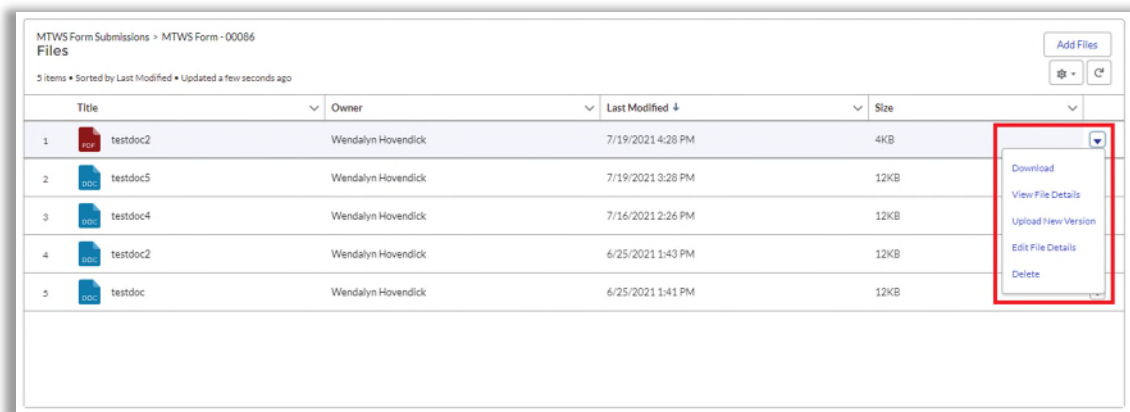


5. Select the location you want to save the file to and click on the Save button.
6. Use the X in the upper right corner of the preview – not your web browser – to close it and go back to the file listing.

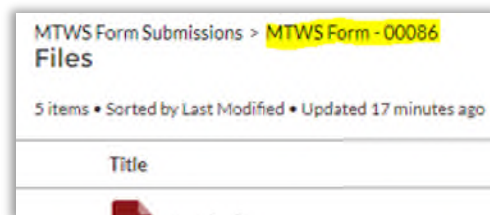
7. Repeat the process to download additional files.

If all the files are not displayed under the “Files” heading, you can get to them by clicking on the View All link below the last file. To download files from the Files page, use the following steps.

1. On the Files page, you can click the file name and then proceed with steps 3-7 above. Alternatively, you can click the on down arrow on the right side of the line for that file and a menu will appear. Click on the Download option.



2. A Save As dialogue box will appear. The file name that appears is the file name that you originally uploaded the file with. Select the location you want to save the file to and click on the Save button.
3. You will be taken back to the Files page. Navigate back to the MTWS Form Submission page using the link to the form in the upper left corner above the Files heading.



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
<ul style="list-style-type: none"> Moved information about working with file attachments to its own document. 	06/05/2024
<ul style="list-style-type: none"> Moved information about accessing the system to a separate document. Added statement about the Rules of Behavior and Privacy Act Statement. Added information in the Tips for Entering Information in the Form section for Sections E and F. 	04/01/2024
<ul style="list-style-type: none"> Updated information on documenting REAC TAC representative that is spoken to in the Technical Assistance section. 	02/06/2024
<ul style="list-style-type: none"> Updated the Accessing the System section with additional information about passwords. 	10/06/2023
<ul style="list-style-type: none"> Clarifications in the Important Information about Working with Files and Uploading Documents with Additional Information sections. 	09/26/2023
<ul style="list-style-type: none"> General look of the document was updated, and wording tweaked as necessary to incorporate the template being used for all HIP training materials. Added information about deleting files from sections D and E. Other clarifications based on user feedback. 	03/14/2023
<ul style="list-style-type: none"> Updated the name of the document on the title page and other areas of the document as needed to reflect that MTW Supplement is a module within the Housing Information Portal (HIP). 	03/02/2023
<ul style="list-style-type: none"> Updated the link (URL) for the login page from https://hud-gateway.force.com/hip to https://hud.my.site.com/hip. Users will continue to use their existing user ID and password. This is only a change to the URL. Any references to the login page in this document have been updated. If a user has bookmarked the login page link, they should update their bookmark at this time. Updates to the Working with File Attachments section. <i>Please review this information prior to attempting to upload any files.</i> Added section for how to delete a draft file. Added section for amendments to approved (final) submissions. Correction to the creating an amendment section. Other updates as needed to clarify content. 	02/13/2023

Items Updated	Date Updated
<ul style="list-style-type: none"> Updated the link (URL) for the login page. Information about storing of a user's password in their web browser was added to the Helpful Information and Tips → Accessing the System section 	07/12/2022
<ul style="list-style-type: none"> 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. Made several updates to the information for uploading and deleting files and have split the previous Uploading and Deleting Files section into two separate sections. 	05/24/2022
<ul style="list-style-type: none"> Added information to the Before You Create the MTW Supplement in the System section to help PHAs prepare their MTW Supplement prior to going into the system. 	05/16/2022 & 05/24/2022
<ul style="list-style-type: none"> Added additional information about the character limits in text boxes to the Field Types section. 	05/03/2022
<ul style="list-style-type: none"> Added a note about the known issues list to the sections about creating and accessing a form. Clarified the information about when passwords expire. Updated the Before You Create the MTW Supplement Online → Notes to Review section to reflect all typographical corrections that have been made in the online system. 	04/15/2022
<ul style="list-style-type: none"> Updated the Email Notifications section with the updated list of statuses that generate automatic email notifications. 	03/14/2022
<ul style="list-style-type: none"> Updated the Uploading and Deleting Files section to further clarify the process for updating a document if HUD requests changes. Also clarified the information about deleting previously uploaded files. 	03/08/2022
<ul style="list-style-type: none"> 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. Clarified in the Uploading and Deleting Files section that files should not be uploaded under the Related tab within a form. Added information about time needed to generate larger PDF files to the Downloading a PDF of the Form section. 	02/02/2022 & 02/17/2022
<ul style="list-style-type: none"> Added two items under the Before You Create the MTW Supplement in the System → Notes to Review section. Added additional information to the Deleting an Existing File section. Added the Revising a Submitted Form section. 	01/11/2022
<ul style="list-style-type: none"> Clarified various text in the document. Added additional details to the Technical Assistance section for what to include when emailing the REAC TAC. 	12/13/2021

Items Updated	Date Updated
<ul style="list-style-type: none"> • 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. • Clarified role of Salesforce in the introduction on page 2. 	11/30/2021
<ul style="list-style-type: none"> • The information under the first bullet in the Before You Create the MTW Supplement in the System→Notes to Review section has been clarified as to how the web-based form has been updated from what is contained on the OMB approved form. 	09/28/2021
<ul style="list-style-type: none"> • The link (URL) for the login page. 	09/03/2021
<ul style="list-style-type: none"> • Added a sub section with information about how to view a list of known issues to the Helpful Information and Tips section. • Clarified the information about entering a File Description when uploading a file and when it is done. • Clarifications to wording in various locations within the document to assist with understanding. 	08/12/2021