



MTW Supplement Module – Working with Forms

(PHA Users)

Contents:

<i>Overview</i>	1
<i>System Requirements</i>	2
<i>Agreeing to the HUD Rules of Behavior and Privacy Act Statement</i>	2
<i>Creating a New MTW Supplement Form</i>	3
<i>Accessing an Existing MTW Supplement Form</i>	5
<i>Deleting a Draft Form</i>	7
<i>Submitting the MTW Supplement</i>	8
<i>Revising a MTW Supplement Form that’s Not Approved</i>	9
Revise an Uploaded Document	9
Remove a Previously Selected Activity	9
<i>Amending an Approved Form</i>	11
<i>Downloading a PDF of the Form</i>	14
<i>Document Update Information</i>	17

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.

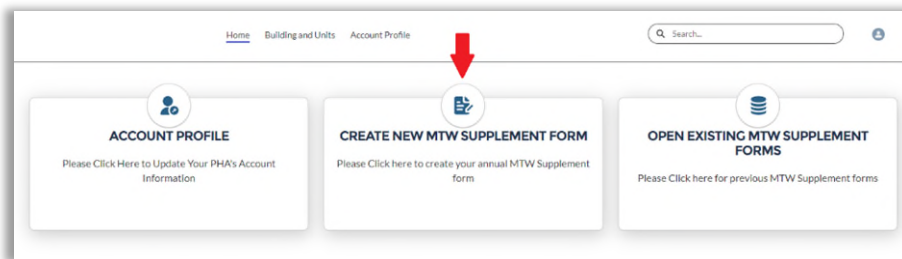
Creating a New MTW Supplement Form

The steps below will guide you through creating a new MTW Supplement form. If you or another user assigned to your PHA previously started a form and wish to continue working on it, you can open it using the [Accessing an Existing MTW Supplement Form](#) section of this document.

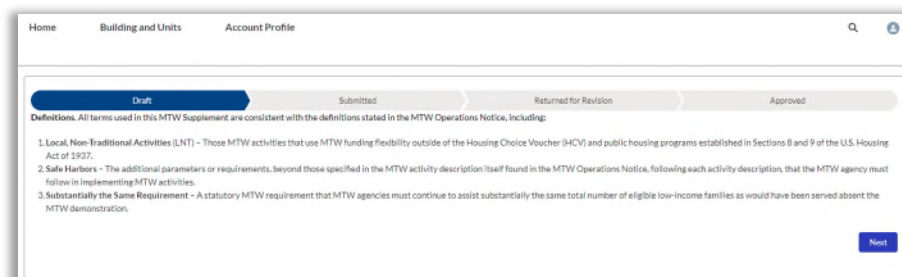
Note: You must use a web browser other than Internet Explorer (IE). If you are not sure which browser is your default, you can check using the instructions in the Checking your Default Web Browser job aid.

Users should look at the known issues list on the [HIP Training page](#) prior to creating a new form. This will help prevent some issues and will provide workarounds for others.

1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Create New MTW Supplement Form. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



3. You will see the introduction page of the MTW Supplement. After you review the definitions on this page, which are taken from the [MTW Supplement to the Annual PHA Plan](#) (HUD-50075-MTW), click on the Next button to proceed.



4. You will be taken to the page that contains Section A, PHA Information, and Section B, Narrative. Most of the Section A, PHA Information, information is prepopulated, but you will need to

complete the Supplement Fiscal Year and MTW Supplement Submission Type (see notes below). You will also need to enter your narrative in Section B.

- The Supplement Fiscal Year should correspond to your Fiscal Year Beginning (FYB). For example, if your submission is for FYB 07/01/2023 you will see the month and year prepopulated under MTW Supplement for PHA Fiscal Year Beginning and you will select 2023 in the Supplement Fiscal Year drop-down box. The year **does not** correspond to the fiscal year (FY) you are doing the form for, e.g., a form for FYB 07/01/2023 would be for FY 2024.
 - The submission type will be Annual Submission.
 - You will only select Amended Annual Submission if you are amending a previously approved MTW Supplement that has the status of Final in the system. See [Amending an Approved Form](#) for more information about this process.
5. When you have completed these entries, click on the Next button to save your entries, and continue with the form. **If you do not click the Next button on this page, your form will not be created!**
 6. Reference the Helpful Information and Tips job aid for additional information on how to use the system and enter information in the various fields.

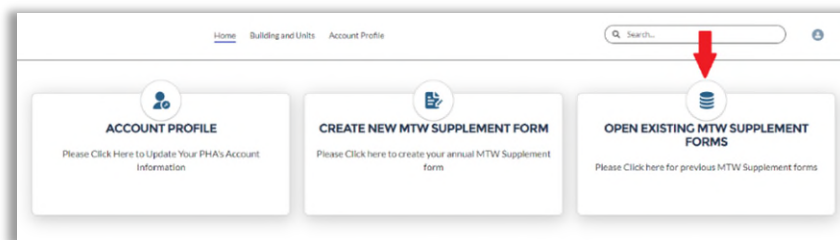
Accessing an Existing MTW Supplement Form

The instructions below will assist you to continue to work with a form you have not yet submitted, revise a form that has been returned for revisions, or view a form. You can open an existing form that was created by another user that is/was assigned to your PHA.

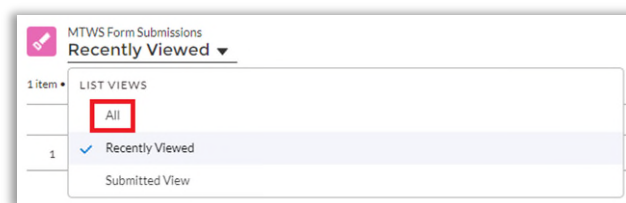
Note: You must use a web browser other than Internet Explorer (IE). If you are not sure which browser is your default, you can check using the instructions in the Checking your Default Web Browser job aid.

Users should look at the known issues list on the [HIP Training page](#) prior to working a form. This will help prevent some issues and will provide workarounds for others.

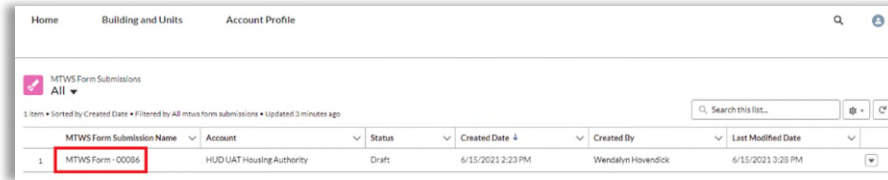
1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Open Existing MTW Supplement Forms. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



3. On the Previous Supplement Submissions page, look for the form number associated with the form you wish to open under the MTWS Form Submission Name column and click on it to open it. Once the form opens, you can enter or edit information, or for forms that are submitted or approved you can view a read only version of the form.
 - If you do not see any forms listed or do not see the one you are looking for, under the MTWS Form Submissions heading click on the arrow to the right of the words Recently Viewed to open a drop-down box and select the All option.



The All view is what will show you the status, Created Date, Created By, and Last Modified Date columns that will also assist in determining the form you wish to open.

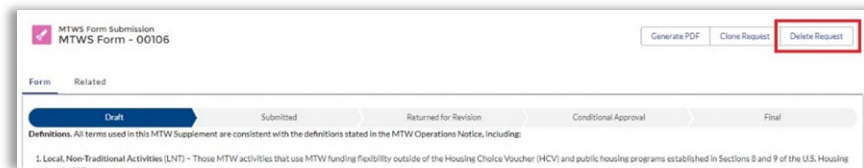


	MTWS Form Submission Name	Account	Status	Created Date	Created By	Last Modified Date
1	MTWS Form - 00086	HUD UAT Housing Authority	Draft	6/15/2021 2:23 PM	Wendalyn Hovendick	6/15/2021 3:28 PM

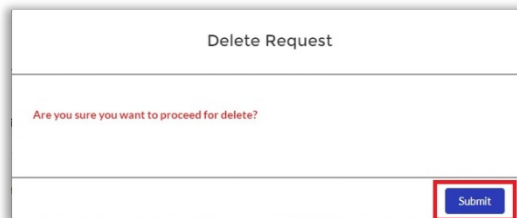
Deleting a Draft Form

If a user creates a new form in error or the PHA no longer needs a form, it can be deleted as long as it is in Draft status. It is good to do this to keep the system clear of unneeded forms. Forms in a status other than Draft **cannot** be deleted by a PHA user. *If you need a form in a status other than Draft to be deleted, please submit a request **by email** using the Information in the Technical Assistance document on the [HIP Training page](#). Provide your PHA code and name, form number (e.g., MTWS Form – 00015), and the reason the file needs to be deleted.*

1. Open the form you wish to delete. *Information on how to open a form can be found in the [Accessing an Existing MTW Supplement Form](#) section of this document.*
2. In the upper right-hand corner of the form, you will see a button labeled Delete Request. Click on this button to initiate the deletion request.

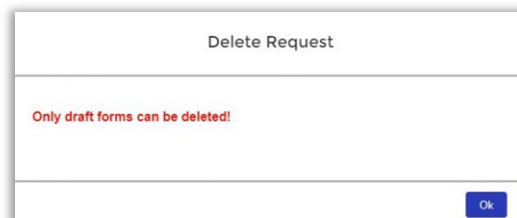


3. A pop-up box will appear and will ask you to confirm that you wish to delete the form. If you do want to delete the form, click on the Submit button in the lower right-hand corner of the pop-up box.



4. You will be taken back to the page that lists any forms that are visible under the currently selected view (e.g., All).

If the form you have open has a status other than Draft, you will see a message that tells you that you cannot delete this form.

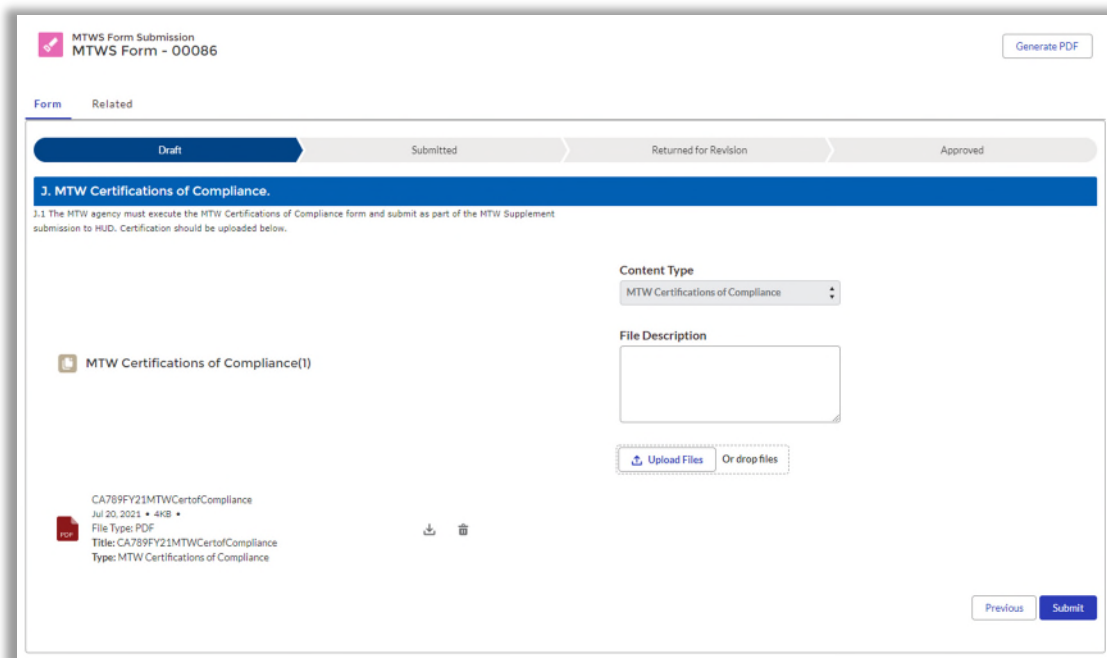


Submitting the MTW Supplement

When you have completed entering all data into the form, you can submit it to HUD for review. Once a form is submitted, you will not be able to make any changes and if you open the form, it will be read only. If HUD notifies you that a form needs revisions, they will set the status to Returned for Revision, at which point you will be able to make modifications again.

Please ensure that you want to submit your form before following these steps. You cannot undo this once this process is completed.

1. Navigate through the MTW Supplement form using the Next button until you reach Section J, MTW Certifications of Compliance, page.
2. If you have not already, upload your MTW Certifications of Compliance. *This can be found within the [MTW Supplement to the Annual PHA Plan](#). Information on how to upload files can be found in the Working with File Attachments job aid on the [HIP Training page](#).*



3. Click on the Submit button in the lower right-hand corner of the page.
4. A pop-up message will appear either at the top (Google Chrome) or elsewhere on the screen that asks you to confirm that you want to submit the form. If you are sure you want to submit, click the OK button. You, as the user that submitted the form, will receive an automatic email notification that your form was submitted. Your local field office and the MTW office will also be copied on this notification.

Revising a MTW Supplement Form that's Not Approved

To revise the contents of an MTW Supplement form, it must have a status of Draft or Returned for Revision. The status of Returned for Revision is given to a form if HUD is requesting corrections/revisions to a form. If a form is not in one of these two statuses, it will be in read only and will not be editable. The information below will guide you on how to make the most common types of revisions.

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 the Working with File Attachments job aid on the [HIP Training page](#) 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 the Working with File Attachments job aid on the [HIP Training page](#) to upload the revised file.

Remove a Previously Selected Activity

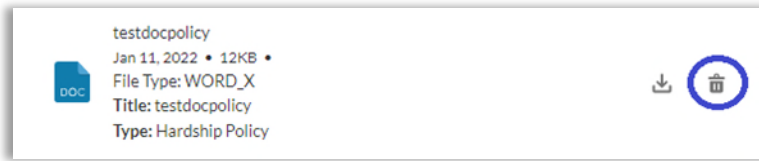
If you need to remove an activity that was previously selected in the Section C screener (e.g., you selected an option other than Not Currently Implemented from the picklist for an activity), you must follow the steps below to remove any files you attached as part of the responses to that activity before you can remove the activity from the form.

Note: If you are not already in the form, follow the instructions in the [Accessing an Existing MTW Supplement Form](#) section to open the form.

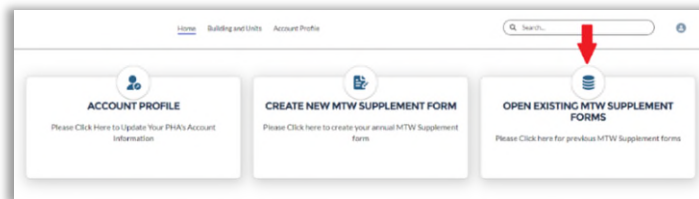
If you did not attach any files in the core questions or custom questions for the activity you wish to remove, you can skip to step 5. This section of the instructions is where the activity is removed is what will remove the text and picklist responses.

1. If you attached files as part of your responses to an activity, you must navigate through the form until you reach the activity that you want to remove so that the attached files can be removed. When you are on the page for the activity, find the area where you attached the file(s). 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

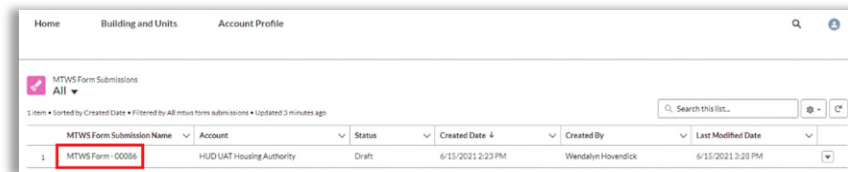
you want to delete the file. Click OK to confirm. The page will refresh, and you will no longer see the file.



2. Repeat step 1 if there are additional files within the core questions or custom questions for this activity that need to be deleted.
Note: If you are removing more than one activity, you'll do these steps for each activity you wish to remove uploaded files for.
3. If you are removing an activity **and it is the only activity** that you were going to submit a Safe Harbor Waiver (SHW) for in Section D, continue navigating through the form until you reach Section D. **First**, delete the file you uploaded. **Only after you have deleted the uploaded file**, modify your response to reflect that you are not asking for approval for a Safe Harbor Waiver.
4. Click on the Home link at the very top of the page. This will take you back to the home page (community portal page).
5. On the home page, click on the tile labeled Open Existing MTW Supplement Forms.



6. On the Previous Supplement Submissions page, look for the form number associated with the form you wish to open under the MTWS Form Submission Name column and click on it to open it.



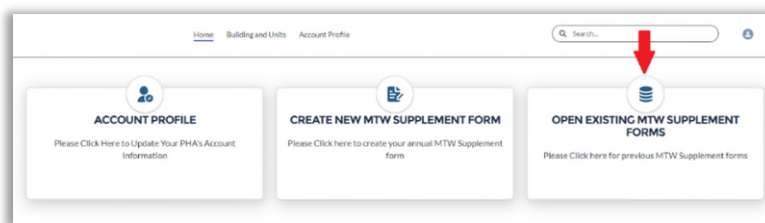
7. Navigate to the first page of Section C, which is the Section C screener. Find the activity or activities you wish to remove and from the picklist select Not Currently Implemented. This will remove the text and picklist responses you entered for the core questions and custom questions.

Amending an Approved Form

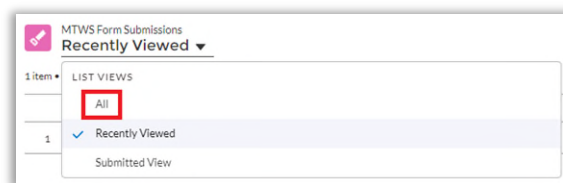
If your MTW Supplement for a specific Fiscal Year Beginning (FYB) has been approved – meaning it has a status of Final in the system – and you need to submit an amended annual submission, you can use the steps below to clone your approved (final) annual submission. This will create a copy of your approved form that contains all the responses and file attachments so that you will only have to update the areas that you need to amend.

Note: The steps below, including use of the “Clone Request” button are **only** to be used for creating an amended form. It is not to be used for any other reason.

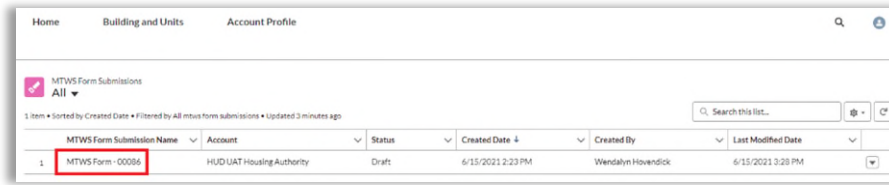
1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Open Existing MTW Supplement Forms. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



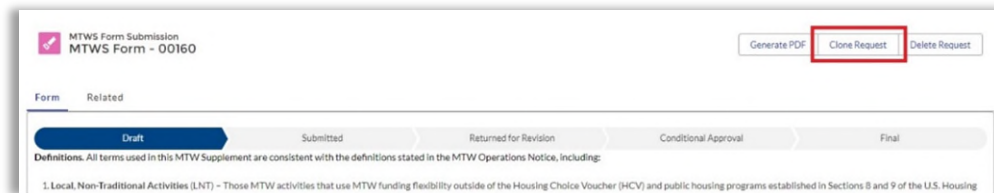
3. On the Previous Supplement Submissions page, look for the form number associated with the approved form you want to amend. It will have a status of Final and should say the year of the FYB for the form you want to amend. Click on the form number under the MTWS Form Submission Name column to open it.
 - If you do not see any forms listed or do not see the one you are looking for, under the MTWS Form Submissions heading click on the arrow to the right of the words Recently Viewed to open a drop-down box and select the All option.



The All view is what will show you the status, Created Date, Created By, and Last Modified Date columns that will also assist in determining the form you wish to open.

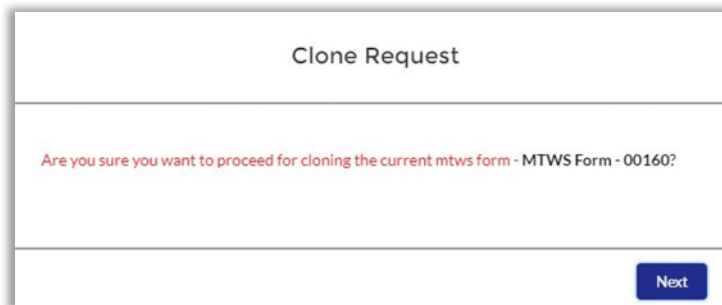


4. Once the form opens, find the Clone Request button on the right side of the page.

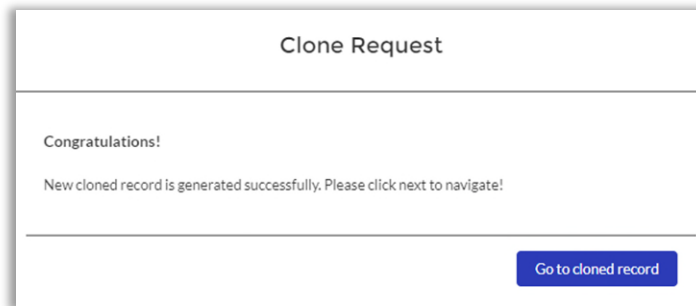


5. You will see a pop-up box that asks you if you are sure you want to clone the form. Click on the Next button to proceed.

Note: If you are in a form that does not have a status of Final, you will receive a message that tells you that you cannot clone a form that does not have a status of Final.



6. Once the clone request has been submitted successfully, you will receive a message telling you the request was successful. Click on the Go to Cloned Record button in the pop-up box to go to the newly created form. **The new form will have a status of Draft.**



7. The new form will open. Keep the following in mind as you amend your approved form:
 - In Section A:
 1. Do **not** change the “Year for Supplement Fiscal Year Beginning” field! It must remain the same as the approved form or this will not be considered an amendment.
 2. You **must** choose Amended Annual Submission in the “MTW Supplement Submission Type” picklist.
 - In other sections of the form:
 1. **Only modify the responses that need to be modified for the amendment.** Leave all other responses as they were in the approved form for this Fiscal Year Beginning (FYB).
 2. Leave all file attachments that were carried forward to the amendment as they are. If you need to modify a file attachment due to the amendment,
8. Once you have made the necessary modifications for your amended form for the specified FYB, you can submit the form using the Submit button in Section J.

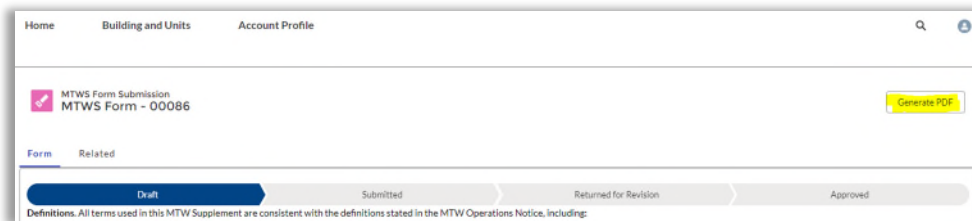
Downloading a PDF of the Form

There are a few uses for the PDF generation feature in the HIP MTW Supplement module. The PDF file does not contain any of the files you have uploaded to the system. If you are using the PDF for a hearing or for your official records, please ensure that you include copies of any files you have uploaded that contain supporting documentation.

- To view a copy of the information you have entered in the form without navigating through the form on the screen.
- To download and print a copy of what you have entered for a public hearing.
- To download and print the approved version of the MTW Supplement for your files.

Note: If you have just created the form in the current login session, you will need to navigate to the home page using the Home button in the upper left-hand corner and then open the form again using the [Accessing an Existing MTW Supplement Form](#) section of this document. You will also use this section if you are not already in the form you wish to generate a PDF of.

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

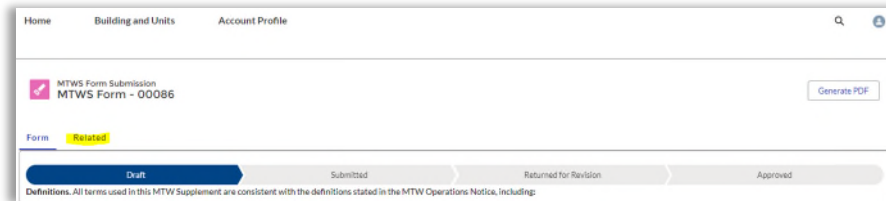


2. A box will be displayed over top of the MTWS Form Submission page (you will still see the page in the background) that states the job has been submitted to generate the PDF. Click on the Finish button to go back to the MTWS Form Submission page.

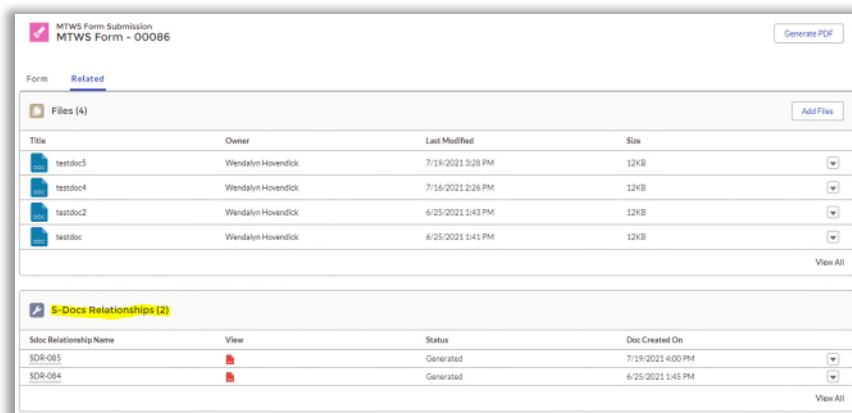


3. You must wait a few minutes to let the system finish generating the PDF file before you continue with these instructions. *This is especially important for forms that contain many waivers and activities.*

- Back 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.

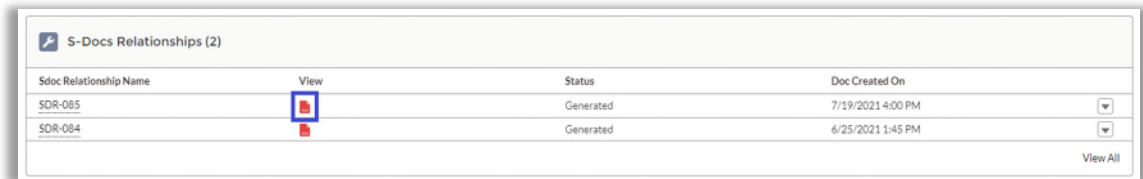


- Scroll down the MTWS Form Submission page until you see the “S-Docs Relationships” heading. A number representing the number of generated PDFs will also appear in parenthesis next to this heading. The first file will be the one you requested.
 - If date and time under the “Doc Created On” column does not say the current date and a time near the current time, it may be that the form has several waivers and activities selected in Section C. **Do not use your Refresh button to refresh the page; it may result in an error or being logged out.** Click on the Related tab at the top of the page to refresh the page.





- 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 in the same way. To leave this page, use the Home button at the top of the page not your browser’s Back button.



S-Docs Relationships (2)

Sdoc Relationship Name	View	Status	Doc Created On
SDR-085		Generated	7/19/2021 4:00 PM
SDR-084		Generated	6/25/2021 1:45 PM

View All

7. While viewing the PDF you can save the file or print it as you normally would.

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 forms 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