

EIV Setup Instructions

A Step By Step Approach for EIV Coordinators

#1 - Obtain a coordinator M-ID(a ID must be obtained by both the coordinator and users), activate the business partner relationship for all properties and set up roles, actions and property assignments. At this point, do not set up any of the EIV Roles yourself and do not assign EIV functions to any users. Additional EIV setup requirements are described below.

If you already have a coordinator M-ID, and are assigned to the properties for which you want to act as the EIV Coordinator, then you can move on to step 2.

If you have a user ID and not a coordinator ID, and you are going to be the EIV coordinator, you must upgrade the user ID to a coordinator ID before you can become the EIV Coordinator (you do not have to be a coordinator to access EIV data only to grant access rights to other users). To upgrade your ID, you must fax a letter to the attention of WASS at 202-485-0280 providing the applicant's M-ID, the owner entity tax ID, and ask to be upgraded to a WASS Coordinator. The letter must be on company letterhead and signed by the owner.

For further guidance and information about applying for a WASS ID or WASS Coordinator Role, contact the Real Estate Assessment Center (REAC) Technical Assistance Center (TAC) team at 1-888-245-4860. **(Please note that the people who make up the WASS team are NOT the same people who make up the Multi-family help desk team.)**

#2 - Obtain a letter of authorization from the owner of each property/contract indicating that you are authorized to act as the EIV coordinator. A sample letter can be accessed from our web site at <http://www.ahtcsonline.com/eiv.html>

#3 – Review the appropriate training materials and complete the Security Awareness Questionnaire for EIV Coordinators. The questionnaire can be found at <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/securityawareness.pdf>

#4 - Once you have obtained the letter from the owner, complete and sign a copy of the Coordinator Access Authorization Form and

- Email the form to Mf_Eiv@HUD.gov or
- Fax it to Multifamily Helpdesk via fax at: 202-401-7984

AHTCS, LLC does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Affordable Housing Training & Consulting Services. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Affordable Housing Training & Consulting Services. shall not be responsible for errors or inaccuracies.

EIV Setup Instructions

A Step By Step Approach for EIV Coordinators

Be sure the form is filled out completely and correctly, if it isn't you will be contacted via telephone to so that you can understand what information is missing or incorrect. The Coordinator Access Authorization Form is available on the HUD/EIV web site at <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/eivhome.cfm>

You only need to send the Coordinator Access Authorization Form (CAAF). Do not send the Multi-family help desk team the letters from the owners or user access forms. However, the owner letters must be kept on file and produced upon request by HUD staff or HUD's agents. For questions on completing the CAAF, please contact the Multifamily Helpdesk at 800-767-7588.

#5 - At this point you must wait for the Multi-family help desk staff to execute the form and set up the EIV Coordinator Role. **No one, other than HUD staff, can complete this step.** If you do not hear from the Multi-family help desk within a couple of days, you must follow up with them by phone or email. They are open from 9:00 AM until 8:00 PM EST.

#6 – While the Help Desk staff are processing the coordinator request, you should obtain a User Access Authorization Form from every user who will require access to EIV. The User Access Authorization form is available on the HUD/EIV web site at <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/eivapps.cfm/>

This form must be completed, signed and on file for EVERYONE who will be assigned access to EIV. You must obtain an executed User Access Authorization Form from users **BEFORE** you provide any user with access to EIV.

If someone does not require access to EIV, do not give them access. This information is extremely sensitive and falls under protections of the Privacy Act. The information may be used only to verify income for the **HUD** multi-family housing program and to identify potential discrepancies between income reported on the 50059 and income included in the Social Security databases.

#7 – You must also ensure that all users have reviewed the EIV documentation and that each user completed the User Security Awareness Questionnaire for EIV Users. You can find a copy of the Questionnaire at <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/securityawareness.pdf>. You should keep a copy of the Security Awareness Questionnaire, for each user, with the User Access Authorization Request.

For additional information about EIV Security Guidance and use of the EIV database, you should access the EIV web site. <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/eivapps.cfm>.

#8 – The Multi-family Help Desk staff will contact you via email to let you know when your HSC (Non-HUD User – EIV Housing Coordinator) Role has been set up. You will also get a signed copy of the last page (signature page) of the CAAF from faxed to the fax number listed on your

AHTCS, LLC does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Affordable Housing Training & Consulting Services. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Affordable Housing Training & Consulting Services. shall not be responsible for errors or inaccuracies.

EIV Setup Instructions

A Step By Step Approach for EIV Coordinators

access request. This signed form, along with the owner letters, must be kept on file for review during your next MOR.

Note: EIV will only contain data on residents with active MAT 10 records in TRACS. If the resident data is not recorded in TRACS there will be no EIV data for that resident. If the contract's certifications or voucher data is not current there will be no data in EIV.

#9 –Complete the setup process for your coordinator ID. The steps to complete setup are below: You can complete these steps **after** you have received the confirmation email from the Multi-family Help Desk.

- A. Access User Maintenance from the Main Menu
- B. Enter the coordinator MID
- C. Click on the “Search for User” button
- D. Choose the option “Property Assignment Maintenance” from the drop down box
- E. If you are a coordinator for multiple properties and you want to set up multiple properties at once, just verify that the MID is correct and click (you need to enter the role code as HSC (if coordinator) This is covered in the User Manual also “Submit” or enter the appropriate Tax ID or Contract Number for a single property
- F. Highlight the MF-EIV Non HUD User option in the top “Assign Roles” window. Then, in the Property ID window, highlight the properties you have been authorized to access (Standard windows UI is available here so you can choose a range of properties by clicking on the first property and shift/clicking on the last property or you can choose selected properties by using the ctrl/click option.)
- G. Click “submit” and then “Confirm”
- H. Access EIV from the Secure Systems Main menu
- I. Click on the Authorization Request
- J. Complete the appropriate fields
- K. Submit the Request

This will prompt the HUD staff to certify you for the properties indicated.

AHTCS, LLC does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Affordable Housing Training & Consulting Services. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Affordable Housing Training & Consulting Services. shall not be responsible for errors or inaccuracies.

EIV Setup Instructions

A Step By Step Approach for EIV Coordinators

It's important to note that you will not be able to access EIV prior to certification by HUD. You will probably see the error below:

"No Contracts are currently assigned to you for viewing Social Security and Supplemental Security Income reports"

Coordinators will have to complete the Electronic Authorization Request every year in order to maintain access to EIV.

#10 – Once HUD has certified you as the coordinator, you can set up access for users who have executed the User Access Authorization Form and the Security Awareness Questionnaire. To do this, complete the following steps for each user.

- A. Access User Maintenance from the Main Menu
- B. Enter the user MID and then
- C. Click on the "Search for User" button
- D. Confirm that you have the correct user
- E. From the drop down box, choose the "Maintain User Profile – Roles" option and click "submit"
- F. Scroll down to the EIV options and click the check box to add a checkmark to the Option "HSU – MF – Non-HUD User" and click on the "Assign/Unassign Roles" button.
- G. Confirm your choice
- H. You will be returned to the User Maintenance Screen for this user
- I. Choose the option "Property Assignment Maintenance" from the drop down box and continue
- L. If you are a coordinator for multiple properties and you want to set up multiple properties at once, just verify that the MID is correct and click (you can/should use the HSU role as described in step F above) "Submit" or enter the appropriate Tax ID or Contract Number for the property
- J. Highlight the MF-EIV Non HUD User option in the top "Assign Roles" window
- K. Then, in the Property ID window, highlight the properties to which this user should have EIV access (standard windows UI is available here so you can choose a range of properties by clicking on the first property and shift/clicking on the last property or you can choose selected properties by using the ctrl/click option)
- L. Click "submit" and then "Confirm"
- M. The User Must then log in to Secure Systems and access EIV by clicking on EIV from the Secure Systems Menu
- N. The User must click on the Authorization Request
- O. The User must click on Create New Request
- P. The User must provide information in the appropriate fields
- Q. The User must submit the Request
- R. Now, the Coordinator must go to EIV

AHTCS, LLC does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Affordable Housing Training & Consulting Services. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Affordable Housing Training & Consulting Services. shall not be responsible for errors or inaccuracies.

EIV Setup Instructions

A Step By Step Approach for EIV Coordinators

- S. Click on the User Requests option on the left
- T. View All Requests
- U. Approve or Deny Requests as appropriate
- V. Click on the User Certification option on the left
- W. Choose to Show New, ALL or Pending Users
- X. Place Checks in the boxes next to the Users/Properties you wish to certify
- Y. Click on the “certify” button

Users must be certified on a quarterly basis. Users that have not been certified by the certification deadlines will be denied access. The certification cycle for 2008 is:

July 1, 2008 through July 30, 2008 (July, August, September)

October 1, 2008 through October 30, 2008 (October, November, December)

For compliance monitoring purposes, be sure to have the following available upon request from HUD or HUD’s agents:

- All owner authorization letters
- All Coordinator Access Authorization Forms signed by HUD
- All User Access Authorization Forms signed by the user
- The Security Awareness Questionnaire for all Users and Coordinators
- A copy your Security/Privacy Policy as it relates to resident data including EIV data

If you have further questions, please [contact](#) the Multi-family Help Desk at Mf_Eiv@HUD.gov.

AHTCS, LLC does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Affordable Housing Training & Consulting Services. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Affordable Housing Training & Consulting Services. shall not be responsible for errors or inaccuracies.