

Coordinator: Assigning roles staff members, fee accountants, and independent auditors.

To assign Users and Fee Accountants to your Public Housing Authority, please complete the following steps listed below. You will need their User ID to complete the process of assigning roles. Where it asks for a User ID, please input the User or the Fee Accountant's ID. **Hint: Most fee accountants already have a role assigned in Maintain User Information. The role will be under the Deleted Role Column. You do not need to go to Maintain User Profile for a User.**

- 1) Go to **User ID Maintenance**; enter the user or fee accountant's User ID, click on the circle that is next to **Maintain User Information**, and then click on **Submit**.
- 2) The User's name and ID will appear again. Scroll down to where it is titled **Assign Roles** and click on the white box next to it so that a checkmark appears. There will be 4 roles under **Assign Roles** for FASPHA. The user only needs one of these roles. Here is the definition for each:
 - **FASPHA-PHA Analyst**- This role enables the individual to input information into the Financial Assessment Subsystem and save it. The role does not entitle the user to validate data or submit the information to REAC. The code for this role is (FIA).
 - **FASPHA-PHA Director**- This role is reserved for the Executive Director of the PHA only. This notifies REAC who the Executive Director is. The role enables the individual to input the data, save it, validate it, and submit it to REAC. The code for this role is (PID).
 - **FASPHA-PHA Submitter**- This role enables the individual to input the data, save it, validate it, and submit it to REAC. This role is often given to fee accountants. The code for this role is (SMT).
 - **FASPHA-CPA Verification**- This role is reserved for the **Independent Auditor only**. This role enables the auditor to complete the Auditor Verification Statement. This role does not entitle the auditor to create an audited draft or submit the information to REAC. The code for this role is (CPV).
- 3) Click on the role that would best suit the user's needs so that it is highlighted. Scroll to the bottom of the page and click on **Update**. You will receive a message that says, "**All updates have been completed successfully**". Click on **Review Update** so that you can review your changes.
- 4) The **Maintain User Information Screen** will appear again. The role that you had highlighted will now appear under the **Delete Roll** column. This now shows that the role is active. Scroll to the bottom of the page and click on **Main Menu**.

- 5) The **Secure Connection Menu** will appear. Scroll down to where it is titled **System Administration Guide** and click on **PHA Assignment Maintenance**.
- 6) The **PHA Assignment Maintenance Screen** will now appear. Enter the user or fee accountant's User ID and be sure that there is a black dot next to **Assign PHA**. Scroll down to **PHA ID** and enter your PHA code (ex. NY005). Scroll down to the **View Selection** button and click on it with your mouse.
- 7) The next screen will appear and will be labeled **Assign roles for PHA**. There will be two columns listed: **Roles** and **PHAs**. Choose the role that you assigned the user in **Maintain User Information**. One of the four listed below will appear under **Roles**.
 - **PHA Analyst (FIA)**
 - **PHA Director (PID)**
 - **PHA Submitter (SMT)**
 - **CPA Verification (CPV)**
- 8) Click on the role and then click on the your PHA so that they are both highlighted. Click **Update**. **Hint: If there is only one role listed, you do not have to click on it. Just click on the PHA and then click Update.**
- 9) The next screen will appear with a message, "**All updates have been completed successfully**".
- 10) Click on **Secure Systems Menu**. The **Secure Systems Menu** will appear. Your user, fee accountant, or auditor is now ready to enter the **Financial Assessment Subsystem PHA**.