

CNA e-Tool, Version 3.0: Assigning Roles As a Coordinator Transcript

A company coordinator's role is to set up and assign users access to the CNA e-Tool. Multifamily Company coordinators will be responsible for granting and revoking co-worker's CNA e-Tool access and roles. Please note, this tutorial is not applicable to FHA Lender Coordinators, as they follow a different process.

Coordinators can access the CNA e-Tool application through the Secure Systems website. After you have received your M-ID and logged into your Secure Systems account, your first action as a coordinator is to complete your coordinator set-up within the site. This will give you the ability to set up and assign other users roles within the system. Coordinator set-up is a 3-step process.

The first step is to assign yourself a Coordinator profile within the system.

- 1) First, go to the User Maintenance page from the Main Menu.
- 2) On the User Maintenance screen, enter your M-ID number and click on the "Search for User" button. You can also search for your account by entering your Full Name and the identification number associated with your organization.
- 3) After a successful search, your user information will appear on the page.
- 4) Next, on the "Choose a Function" drop-down menu that appears below your user information, select "Maintain User Profile – Actions" and "Submit".

This will direct you to the assignment page to assign yourself the role of Coordinator.

- 1) Check the "COR – Coordinator" box under the CNA e-tool heading and any other subsystems to which you require access.
- 2) Once all the appropriate boxes for items to which you require access are checked, Select "Assign/Unassign Actions".
- 3) A screen will appear that states that you have successfully assigned or unassigned actions to the user. Select "OK" and the system will take you back to the Maintain User page.

In step two of coordinator set up, you will assign yourself roles in the CNA e-tool. There are two roles that a user can be assigned in the CNA e-tool, an "external submitter" or an "external reviewer". An external submitter is able to submit a CNA. An external reviewer is only able to review a CNA.

- 1) On the "Choose a Function" drop-down menu, select "Maintain User Profile – Roles" and "Submit".
- 2) Check the boxes for both "External Submitter" and "External Reviewer".
- 3) Once all the boxes are checked, Select "Assign/Unassign Roles" and then select "Confirm" to verify the roles selected for the user.
- 4) Another screen will appear that states that you have successfully assigned or unassigned actions to the user. Select "OK" and the system will take you back to the Maintain User page.

CNA e-Tool, Version 3.0: Assigning Roles As a Coordinator Transcript

As a final step to coordinator set-up, adjust your participant assignment. In this step, you are associating your account with your organization.

- 1) On the “Choose a Function” drop-down menu, select “Participant Assignment Maintenance”. Press “Submit”. If you work for a PHA, you will need to visit the System Administration menu on the left and select “PHA Assignment Maintenance” to complete this task.
- 2) On the “Assignment Maintenance” page, enter your M-ID in the User ID field. Under “Choose a Function” Select the “Assign” option and “Submit”.
- 3) On the next screen, Highlight your roles at the top of the page and highlight the entities in the lower half. Select “Submit”.
- 4) This will take you to a confirmation screen. Select “Confirm”. A screen will appear that states that you have successfully assigned the participant to the user. Select “OK” and the system will take you back to the Assignment Maintenance page.

Congratulations, you are now setup as Coordinator in Secure Systems! You will see the subsystems that were setup under the “Systems” menu on the left side of the screen.

Coordinators have the important job of granting users access to the CNA e-tool and assigning users roles for the site.

Complete the following two steps for each user that will be working on your Capital Needs Assessments.

The first step is to assign the user roles within the CNA e-tool.

1. First, go to the User Maintenance page from the Main Menu.
2. On the User Maintenance screen, enter the user’s M-ID number and click on the “Search for User” button. You should contact the user to confirm their M-ID. You can also search for a user by entering the user’s Full Name and the identification number associated with their organization.
3. After a successful search, the user’s information will appear on the page.
4. Next, on the “Choose a Function” drop-down menu that appears below the user’s information, select “Maintain User Profile – Roles” and “Submit”.
5. If the user should only have the ability to review a CNA, check the “External reviewer” box. Check both the “External Submitter” and “External reviewer” boxes if you would like the user to have the ability to submit and review a CNA.
6. Once all the boxes are checked, select “Assign/Unassign Roles” and then select “Confirm” to verify the roles selected for the user.
7. Another screen will appear that states that you have successfully assigned or unassigned actions to the user. Select “OK” and the system will take you back to the Maintain User page.

CNA e-Tool, Version 3.0: Assigning Roles As a Coordinator Transcript

The second step is to adjust the user's participant assignment and associate the user's account with your organization.

1) On the "Choose a Function" drop-down menu, select "Participant Assignment Maintenance" and press "Submit". If you work for a PHA, you will need to visit the System Administration menu on the left and select "PHA Assignment Maintenance" to complete this task.

2) On the "Assignment Maintenance" page, enter the user's M-ID in the User ID field. Under "Choose a Function" Select the "Assign" option and "Submit".

Repeat this two-step process for each CNA e-tool User at your organization.