Getting Started in APPS

Step 1 - Establishing an Individual or Organization in APPS

- If you have never done business directly with HUD which required access to HUD's secure systems (TRACS, Inspection retrieval, Financial Reporting) you should first register your company, or if you are doing business as an individual, register yourself by clicking on the Business Partner MultiFamily Link on the APPS Home Page at the following URL- http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm.
- After completing this screen, the system takes approximately 24 hours to access the data. Wait at least 24 hours after registering the Participant before applying for a Coordinator or User ID.

☺ ***Note: A good rule of thumb is if your company has filed a financial statement or has retrieved HUD related property inspection reports on-line, then your company is probably registered in HUD systems and all that is needed is a Coordinator or User ID.***

Step 2 - Applying for a Coordinator/User ID for a Company or Individual

Types of Users in Secure Systems:

Coordinator: Controls access to the system and performs system administration functions, such as retrieving IDs, and assigning rights to users. For more information please refer to Chapter 3 of the Online User Guide. The system generally limits each Business Partner to two Coordinators. It is recommended that the Management Staff of the Business Partner designate two Coordinators to accommodate the business needs of the organization as they pertain to the APPS system.

User: An authorized user can be an employee of the Business Partner or a third party (e.g., CPA) authorized by the Business Partner's Coordinator to submit data on behalf of the Business Partner.

- Register for Coordinator/User ID at https://hudapps.hud.gov/public/wass/public/participant/partreg_page.jsp
- Allow two weeks to process the Coordinator ID request. A User registration application is processed nightly and can be retrieved by the Coordinator.

☺ ***Notes: If you do not have a Participant Record in APPS, you must first establish your identity within APPS by registering yourself before the system will allow you to apply for a coordinator/user ID. Please refer to Step 1. Use your parent company Tax ID when registering to become a Coordinator or User. Lastly, to request a Coordinator role for multiple companies/individuals, you must have first completed Steps 2 through 5 for your first (initial) Coordinator role. You may then go directly to Step 6 to request additional Coordinator roles.***

Step 3 - Assigning yourself as a Coordinator (You must complete both steps 3 and 4 before your ID will be useful)

Once you have registered and have received your Coordinator ID, you will need to assign yourself as a Coordinator for the company/individual

- On the APPS Web Page http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm
- Click Secure Systems
- Enter User name (which is your M ID) and Password (The password you selected during registration.)
- Click "OK"
- On the User Login Legal prompt screen, Click "Continue"
- Select "User Maintenance"
- Enter your Coordinator ID (M ID)
- Click on "Search for User"
- Select "Maintain User Profile – Actions" from the "Choose a Function" drop down menu
- Click "Submit"
- Check "COR – Coordinator" checkbox and "UPD- Update" checkbox
- Click "Assign/Unassign Actions"
- Select "OK". You have now assigned yourself as a Coordinator

Step 4 - Assigning Users

- For the Coordinator to retrieve the User ID:
  - From the Secure Systems Main Menu page, select "User Maintenance"
  - Enter "First Name" and "Last Name" of the User
  - Select "Search Users"
  - Retrieve User ID
- To assign the User System Roles:
  - From the Secure Systems Main Menu, select "Participant Assignment Maintenance"
  - Enter the retrieved User ID (M ID), select Assign Participant from the "Choose a Function" drop down menu
  - Select "AUP/APPS Update"
  - Select the company/individual you want to assign user roles to (You can select multiple companies/individuals by using the Control key on your keyboard)
  - Click "Submit"
- To Assign Coordinator/User roles
  - On the "Secure Systems Main Menu", select "User Maintenance"
  - Enter your "Coordinator ID" or "User ID" (M ID)
  - Select "Maintain User Roles" from the " Choose a Function" drop down menu
  - Click "Submit"
  - Check "AUP– APPS Update" checkbox
  - DO NOT SELECT READ ONLY IF YOU OR YOUR USER WILL ENTER DATA
  - Click "Assign/Unassigned Action"
  - Select "OK". You have now assigned yourself roles

☺ ***Note: Please reboot your system at this point for your new assignments and roles to be activated.***

Step 5 – Requesting Key Codes

- From The "Secure Systems Main Menu", select "Business Partners Maintenance"
- Enter your User ID
- Select "Request New/Delete Existing Relationships" from the "Please enter a Function" drop down menu
- Enter the Taxpayer Identification Number (TIN)/Social Security Number (SSN) for the companies/individuals you requested access to.
- Click "Submit"
- **Verify names and addresses (To ensure activation keys are mailed to the proper address)**
- Click "Confirm"
- Click "OK"

- **To activate your relationships:**
  - From the Secure Systems Main Menu page, select "Business Partners Maintenance"
  - Select "Activate Relationships" from the "Please enter a Function" drop down menu.
  - Enter Activation Keys
  - Click "Submit"
  - Verify information
  - Click "Confirm"
  - Click "OK"

Step 6 - Assigning yourself rights to (a) Company/Companies/Individuals

- From the Secure Systems Main Menu page, select "Participant Assignment Maintenance"
- Enter your User ID (M ID)
- Select "Assign Participant" from the "Choose a Function" drop down menu
- Select "AUP - APPS Update" from the Choose a Role section
- Select the company/companies/individuals you want to assign rights to from the Participant section (You can select multiple participants by using the Control key on your keyboard)
- Click "Submit"
- Verify the list of company/companies/individuals you are requesting relationships for
- Click "Confirm"
- Click "OK"

Step 7 – Getting started in APPS ☺

- From the Secure System, select "Active Partners Performance System (APPS)"
- Select "Create Submission" from the "Submission Processing" drop down menu.
- Click "Go"
- Enter "TIN"
- Click on Submit

☺ ***Note: The baseline submission is a wizard process that takes you through each step in establishing a baseline. Please refer to Chapter 5 of the Online User Guide for detailed instructions on baseline submissions.***

APPS Wizard Process

Step 1 - Enter Contact information

- Select "Create Submission" from the *Submission Processing* drop-down list. Click Go.
- Enter the applicant's TIN. Click Submit. The 2530 Step.1 Edit Contact Information page will display. (Upper portion of screen information is auto populated by APPS)
- Enter/edit the Contact Information. (Note that the Fields marked with an asterisk are mandatory.) Click on Next Step.

Step 2 - Create Organizational Structure

- The Edit Organization Structure screen will display. This is where you build the organizational structure of the entity
- To add Principals from the Step 2 Organization Structure screen select the Add Principal button.
- Enter the principals TIN or SSN. Select Search.
- Enter the principal's information. (Fields marked with an asterisk are required).
- Click Save. The screen refreshes with the message, "Principal has been added successfully."
- You will be back at the Edit Organization Structure screen (step 2)
- To add another principal repeat this process.
- Select Next Step.
- To edit principals, select Edit Principal, edit and save.
- To remove principals, select Remove Principal, remove and save.

☺ ***Notes: You must add at least one individual principal to the Organization Structure in order to create a Baseline. Organizations added as principals must have previously submitted a Baseline Submission in APPS.***

Step 3 - Add Previous Participation

- To add Previous Participation from the 2530 Submission, Step 3 Edit Previous Participation screen select Previous Participation. The screen should show you the applicant, (the organization), and the principals you just added in Step 2. Now you will begin to enter all the previous participation for the organization.
- Select Applicant
- Select Previous Participation
- Select Add Participation

- Select a Property Role – Enter the applicants' role in the property you are adding. (note the fields marked with an asterisk are mandatory.) Fill required information and click Search.
- Select the HUD property for which you want to establish Previous Participation if you have more than one property displayed and Click Add Previous Participation.
- The Previous Participation Detail screen will display. When all information is filled out click on Save. The Screen refreshes with the message, "Save was successful."
- Click Previous Participation List button to go back to the Previous Participation List screen. The property you added should be listed under Direct Participation
- Repeat this process to add addition previous participation.
- To edit Previous Participation select the Previous Participation to be edited and Click Edit Participation. The Edit Previous Participation option is also accessible via the APPS Home page under the Participant Processing drop down.
- Edit the appropriate fields. Click Save. Screen displays with the message, "Save was successful."
- Click Previous Participation List button. The Previous Participation List screen displays with your new information. Click next step.

☺ ***Notes: Previous Participation is accessible from the APPS Home Page in the Participant Processing drop-down list, the 2530 Submission Step 3. Edit Previous Participation screen, Previous Participation List screen, and the Edit Previous Participation screen from the Select participant processing drop-down list. New participation is not automatically added to the Previous Participation listing in APPS. After final approval of a submission the coordinator must edit Previous Participation to add the new business. APPS now allows for previous participation to roll down to all tiers when added at the applicant level.***

Step 4 - Add Comments

- From the 2530 Submission Step 4, Edit Applicant Comments screen add comments. Adding comments here are optional.
- Click on Finish. The APPS Home Page will display with comment "Baseline Submission complete".

Step 5 – Editing Baseline

✓ If you have to stop data input prior to finishing your baseline
  Select Edit Submission from the first drop down list OR
  Enter one of the search criteria
  Click Search

- Click 2530 Submission
  - Step 1 Edit Contact Information screen will display
  - Click Next Step until you get to where you left off
  - Follow the detail above for details on each step
- Select View My Submission in Process from the first drop down list
  - Submission List screen will display
  - Select the applicant
  - Click 2530 Submission
    - Step 1 Edit Contact Information screen will display
    - Click Next Step until you get to where you left off
    - Follow the detail above for details on each step

Once you have established all Principals and Previous Participation, you have now completed the Baseline Submission Process. You will now be redirected back to the APPS Home page.

Step 6 – Editing Certification

From within the 2530 submission:

- From the 2530 Submission page, select Certification from the Select participant processing dropdown list and click the Go button.
- The 2530 Submission Certify Submission page will display.
- Select the radio button for participant you would like to edit certification for and click on the certify button.
- The Participant Certification page will display.
- Click on the Add Certification button.
- The Participant Certification page will display. (At this point you may edit the certification information.)
- Click on the Save button.
- The 2530 Submission Certify Submission page will display with the message…..**Certification has been saved successfully.**

From the APPS 2530 Homepage:

- From the APPS Homepage, select Edit Certification from the Participant Processing drop down and click on the Go button.
- The Participant Search screen will display, Enter the SSN or TAX ID you wish to edit certifications for and click on the search button.
- The Participant Certification page will display.
- From the Participant Certification page enter the submission ID in the top right of the corner and edit the certifications.
- Click on the Save button.
- The 2530 Submission Participant Certification page will display with the message…..**Certification has been saved successfully.**

☺ ***Notes: A submission cannot be sent to HUD unless the certification for the submission is complete. If there is a participant within your organization structure that you do not have access to you have to do one of the following:***

- ***Obtain Access for that participant.***
- ***Have the coordinator for that participant complete the certifications for the submission.***

Please refer to the steps above to complete the certifications for your 2530 submission.