

## EIV Setup Instructions

### A Step By Step Approach for EIV Coordinators

#1 - Obtain a coordinator M-ID (an ID must be obtained for each coordinator and each user), activate the business partner relationship for all properties and set up roles, actions and property assignments. At this point, you cannot set up any of the EIV Roles yourself and cannot assign EIV functions to any users. Additional EIV setup requirements are described below. For additional information about obtaining access to Secure Systems, which includes TRACS, APPS, REMS, REAC and EIV (as well as other HUD databases), you can refer to HUD's Secure Connection and Secure Systems User Manual at <http://www.hud.gov/offices/reac/products/wass/files/000reference.pdf>.

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 user's name, 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 REAC TAC (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 [www.rbdnow.com](http://www.rbdnow.com)

#3 – Review the appropriate training materials and be prepared to complete the Security Awareness Questionnaire for EIV Coordinators.

#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](mailto:Mf_Eiv@HUD.gov) or
- Fax it to Multifamily Helpdesk via fax at: 202-401-7984

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**Be sure the form is filled out completely and correctly**, if it isn't complete or correct, you will be contacted via email or 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/coordinatoraccess.pdf>

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 Authorization Forms (UAAF). All of these documents 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. (HSC) **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. [Mf\\_Eiv@HUD.gov](mailto:Mf_Eiv@HUD.gov) They are open from 9:00 AM until 8:00 PM EST. *Be sure to get a copy of the signed, executed CAAF from HUD. You will be required to present this document to your reviewer at the next MOR. The document must be included in an EIV file for all properties if you act as the EIV Coordinator for that property.*

#6 – While the Help Desk staff is processing the coordinator request, you should make sure that all staff who will access EIV participates in some form of training. EIV Training delivered in December of 2009 is available on HUD's web site at <http://portal.hud.gov/portal/page/portal/HUD/webcasts/archives>. In addition, two EIV Question and Answer webcasts are also available from the same site. Document training annually. After training is complete, 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/useraccess.pdf>

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.

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If an employee reviews or sees EIV reports, but does not have access to the EIV system, that employee must sign the Rules of Behavior and this must be presented to reviewers at the MOR. The Rules of Behavior document can be found on HUD's web site at <http://www.hud.gov/offices/hsg/mfh/rhiip/eiv/rulesofbehavior.pdf>

# 7 – You must also ensure that all users have reviewed the EIV documentation and that each user is prepared to completed the User Security Awareness Questionnaire for EIV Users. You must keep a copy of the User Access Authorization Request. In addition, all Users should review the property's/company's EIV Security Policy and EIV Use Policy.

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> and Housing Notice 10-10 at [http://portal.hud.gov/portal/page/portal/HUD/program\\_offices/administration/hudclips/notices/hsg](http://portal.hud.gov/portal/page/portal/HUD/program_offices/administration/hudclips/notices/hsg)

#8 – The Multi-family Help Desk staff will contact you via email or fax 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 access request. This signed form, along with the owner letters, must be kept on file for review during your next MOR. *Be sure to get a copy of the signed, executed CAAF from HUD. You will be required to present this document to your reviewer at the next MOR. The document must be included in an EIV file for all properties if you act as the EIV Coordinator for that property.*

#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

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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. Complete the Security Awareness Training Questionnaire
- J. Click on the Authorization Request
- K. Complete the appropriate fields
- L. Submit the Request

This will prompt the HUD staff to certify you for the properties indicated. Coordinator certification generally takes two to three business days. Check the EIV Coordinator Certification Report to see your coordinator certification status.

***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. 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

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- M. 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. Each User must Complete the Security Awareness Training Questionnaire
- O. The User must click on the Authorization Request
- P. The User must click on Create New Request
- Q. The User must provide information in the appropriate fields
- R. The User must submit the Request
- S. Now, the Coordinator must go to EIV
- T. Click on the User Requests option on the left
- U. View All Requests
- V. Approve or Deny Requests as appropriate
- W. Click on the User Certification option on the left
- X. Choose to Show New, ALL or Pending Users
- Y. Place Checks in the boxes next to the Users/Properties you wish to certify
- Z. Click on the “certify” button

Users must be certified on a semi-annual basis. Users that have not been certified by the certification deadlines will be denied access. You can check each user’s certification deadline by clicking on the EIV User Certification Report.

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

- All coordinator authorization letters from the property owners (see a sample at [www.rbdnow.com](http://www.rbdnow.com))
- The original **and** current Coordinator Access Authorization Forms(CAAF) The current CAAF can be printed from EIV for one year.
- The original **and** current User Access Authorization Forms for all Users with access to EIV for this property. The current UAAF can be printed from EIV for one year.

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- The Security Awareness Questionnaire for all Users and Coordinators (EIV will prompt coordinators and users to complete the Security Awareness Training Questionnaire when access is assigned and each year thereafter. Print the Questionnaire Results and make them available to reviewers at your MOR)
- A copy your Security/Privacy Policy as it relates to resident data including EIV data
- A copy of your EIV Use Policy (see HUD Notice 08-03  
<http://www.hud.gov/offices/adm/hudclips/notices/hsg/files/08-03HSGN.doc> and HUD Notice 10-10  
[http://portal.hud.gov/portal/page/portal/HUD/program\\_offices/administration/hudclips/notices/hsg](http://portal.hud.gov/portal/page/portal/HUD/program_offices/administration/hudclips/notices/hsg))
- A copy of your EIV Master File which includes:
  - Existing Tenant Report – Before move in
  - Failed Pre-Screening/Failed Verification – Monthly
  - Deceased Tenant – At least quarterly and as indicated in the property’s EIV policies
  - New Hires Report – At least quarterly and as indicated in the property’s EIV policies
  - Multiple Occupancy Report – At least quarterly and as indicated in the property’s EIV policies
  - Income Report – 90 days after move-in
  - Income Report/Income Discrepancy Report - At annual and interim and as indicated in the property’s EIV policies
  - No Income Report – As indicated in the property’s EIV policies

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

***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.***

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