



## iMAX Quick Start REVISED

revision date 2/25/2009

Ross Business Development, Inc.  
www.rbdnow.com

The multi-family industry is experiencing exciting changes to the certification process and how we transmit TRACS information to the Contract Administrators and HUD. The first two steps in this process are to establish a new connection to the TRACS database using iMAX and to update your software to support TRACS version 202C.

We have received several calls from people who are confused about the setup of the Secure Systems iMAX role. This document was created to give you some tips about establishing a new connection to the TRACS database. This is done by converting from TRACSMail to iMAX. While many of you are already submitting TRACS files using iMAX, there are others who are just beginning or just finalizing the process.

I hope this helps explain what to do to prepare for and implement the change.

**The deadline to switch from TRACSMail to iMAX is February 28, 2009.** This means that, starting with the March voucher (RAP/Rent Supp) or April vouchers (all other multi-family programs), all vouchers must be transmitted using iMAX or HUD will not receive them and they will not be processed.

### To Establish iMAX Access

TRACS files are sent by owner/agent staff using their own WASS/Secure Systems M-ID. This is the same M-ID used for other Secure Systems databases such as FASSUB, APPS, EIV or REAC. **Sharing of passwords is strictly prohibited and can result in permanent termination of access to Secure Systems.**

There are two types of M-IDs; M-IDs for the WASS/Secure Systems Coordinator and M-IDs for the WASS/Secure Systems Users. (M-ID, WASS ID, Secure Systems ID and REAC ID are all the same thing) Each property must set up at least one WASS/Secure Systems Coordinator before WASS/Secure Systems Users can be set up. iMAX files can be sent by either the Coordinator or the User.

**WASS/Secure Systems Coordinators:** The WASS/Secure Systems Coordinator must be set up in Secure Systems first. In general, management companies should not need more than two WASS/Secure Systems Coordinators. However, owner/agents can establish up to 5 WASS/Secure Systems Coordinators. Each WASS/Secure Systems Coordinator must have his/her own user name (M-ID) and password.

**WASS/Secure Systems Users:** WASS/Secure Systems Users are set up by the WASS/Secure Systems Coordinator. Each WASS/Secure Systems User must have his/her own user name (M-ID) and password.

**Obtaining a WASS/Secure System M-ID and password:** If you do not have a WASS/Secure Systems M-ID or password you must register with HUD.

To register for a WASS/Secure Systems Coordinator ID and password or WASS/Secure Systems User ID and password, complete the form on the following HUD web site.

[https://hudapps.hud.gov/public/wass/public/participant/partreg\\_page.jsp](https://hudapps.hud.gov/public/wass/public/participant/partreg_page.jsp)

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Coordinators must be aware that the address in the confirmation screen indicates where the activation key will be mailed. This should be the current address for the owner. If this is not correct, DO NOT PROCEED. If the address is incorrect, it should be corrected in APPS before the WASS/Secure Systems Coordinator can request a WASS/Secure Systems Coordinator M-ID and password. (APPS is the system used to record 2530 Past Performance information.)

**TRACSMail ID and TRACSMail Passwords:** Each property also has a TRACSMail ID and TRACSMail password to identify the address to send and receive TRACS Files. **If you previously sent TRACS files through TRACSMail, your property already has a TRACSMail ID and TRACSMail password.** Generally, your software vendor will convert this when you make the switch from TRACSMail to iMAX. HUD strongly suggests that each property has its own TRACSMail ID and TRACSMail password but properties can share a TRACSMail ID and TRACSMail password.

### Instructions for Establishing iMAX Access - Coordinator

If you are a WASS Coordinator and want to assign the iMAX role to yourself or to a user, complete the following steps.

**Step 1** - Obtain a WASS/Secure Systems Coordinator M-ID (an ID must be obtained by both the WASS/Secure Systems Coordinator and WASS/Secure Systems Users) and activate the business partner relationship for all properties. If you already have a coordinator M-ID, move on to Step 2.

If you have a WASS/Secure Systems M-ID and not a WASS/Secure Systems Coordinator M-ID, and you are going to be the coordinator, you must upgrade the user ID to a coordinator ID. You do not have to be a coordinator to send TRACS files only to grant access rights to other users. To upgrade your M-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 property 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/TAC team are NOT the same people who make up the Multi-family help desk team.)**

Once the WASS/Secure Systems coordinator and WASS/Secure Systems users are established, the coordinator must set up the iMAX coordinator action and iMAX role for himself/herself and then the coordinator must set up the iMAX role for each user. Previously, some coordinators were unable to see the iMAX role. Adding the iMAX Coordinator Action "step" seems to have alleviated this problem.

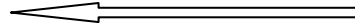
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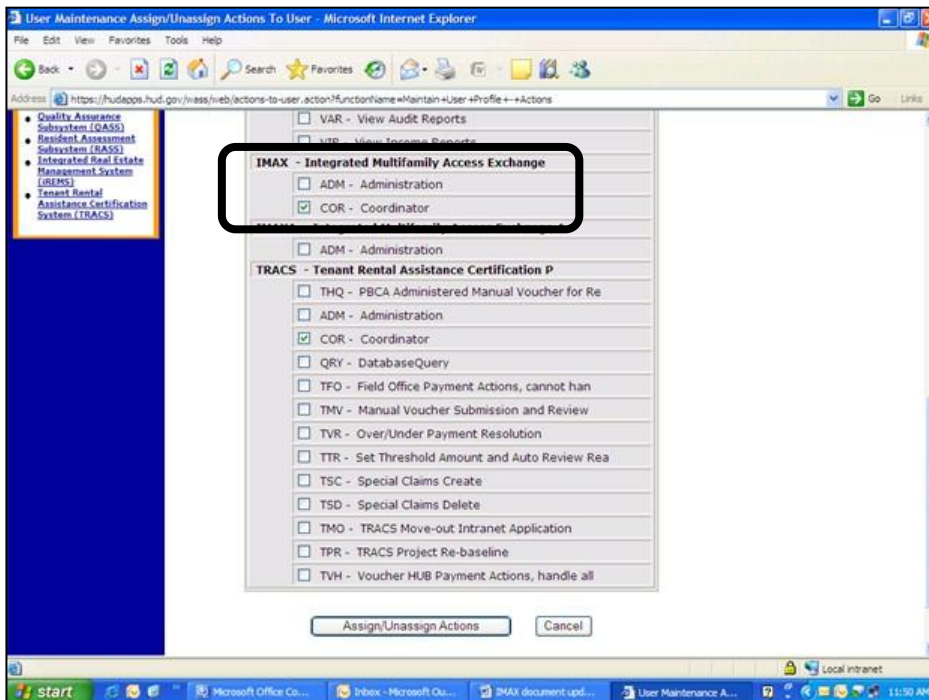
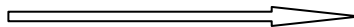


**Step 2** - From the WASS main menu, under **System Administration**, click **User Maintenance**. The **User Maintenance** page displays.

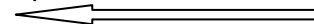
**Step 3** - On the **User Maintenance** page, in the **User ID** field, enter your coordinator M ID. Click the **Search for User** button.



**Step 4** - If you entered the correct MI ID, the Maintain User page displays. Open the drop down menu and choose the option to **Maintain User Profile - Actions**



**Step 5** - Click in the box to add a check next to the iMAX Coordinator option. Then click Submit.



You will be asked to confirm your addition. Once that is done, you will get a message saying that the action was assigned successfully. This must be done for each coordinator who will set up users or who will send and receive TRACS transmissions.

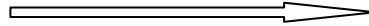


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**Step 6** – Once you have completed setup of the iMAX Coordinator Action, you will be returned to the **Maintain User** page. Open the drop down menu and choose the option to **Maintain User Profile – Roles**.



When you choose this option, you will be taken to the screen that allows you to activate new roles for this coordinator. Please keep in mind that the iMAX role must be set up for the coordinator before the role can be set up for users.

**Maintain User MXXXX**

User Information	
User ID	MXXXX
First Name	JOHN
Middle Initial	J
Last Name	DOE
User Status	Active
Coordinator	Yes
User Type	Business Partner
Choose a Function	
Business Partners Maintenance	▼
Business Partners Maintenance	
Maintain User Information	
Maintain User Profile - Actions	
<b>Maintain User Profile - Roles</b>	
Property Assignment Maintenance	
Resend Letter	

**User Information**

User ID	MXXXX
First Name	JOHN
Middle Initial	J
Last Name	DOE
User Status	Active
Coordinator	Yes
User Type	Business Partner

Please check/uncheck boxes to assign/unassign roles to the user  
Disabled roles cannot be unassigned until they are removed in the appropriate Assignment Maintenance screens

**iMAX | LOGCS | TRACS |**

**iMAX - Integrated Multifamily Access Exchange**

IME - iMAX (TRACSMail replacement) for external users

ADM - Administration

QRY - Query

REQ - Requisition

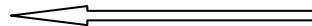
YES - Year End Settlement

**TRACS - Tenant Rental Assistance Certification P**

TTQ - TRACS Tenant Query

TVQ - TRACS Voucher Query

**Step 7** - Click in the box to add a check next to the iMAX option. Then click Submit.



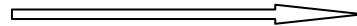
You will be asked to confirm your addition. Once that is done, you will get a message saying that the role was assigned successfully. Now your iMAX setup is complete. If your software uses the system to system interface, you will need to wait 24 to 48 hours before you will be added to the iMAX working group (this is done by HUD).

## Instructions for Establishing iMAX Access - Users

To set up the iMAX role for a WASS/Secure Systems User, the WASS/Secure Systems Coordinator must follow the steps below.

**Step 1** – Each user must obtain a WASS/Secure Systems User M-ID. If the user already has an M-ID, move on to Step 2. If not, go to the following web site to apply.  
[https://hudapps.hud.gov/public/wass/public/participant/partreq\\_page.jsp](https://hudapps.hud.gov/public/wass/public/participant/partreq_page.jsp)

**Step 2** - From the WASS main menu, under **System Administration**, click **User Maintenance**. The **User Maintenance** page displays.



**Step 3** - On the **User Maintenance** page, in the **User ID** field, enter the MID for the user to whom you want to assign the iMAX role. Click the **Search for User** button.

**System Administration** mail | help | search | home | support

**Secure Systems**

Welcome ROSEMARIE

**System Administration**

- Assistance Contract Assignment Maintenance
- Business Partners Maintenance
- Participant Assignment Maintenance
- Planned Change
- Property Assignment Maintenance
- User Maintenance

**System**

- Active Partner Performance System (APPS)
- Financial Assessment Subsystem - Multifamily Housing (FASUB)
- Physical Assessment Subsystem (PASS)
- Physical Inspection
- Resident Assessment Subsystem (RAS)
- Tenant Assessment Subsystem (TAS)
- Tenant Rental Assistance Certification System (TRACS)
- Unique ZPA Identifier (UII) Registration System (QAS)

**User Maintenance**

On this form, you can either search for a User by User ID, or search for Users by entering your search criteria.

**Search by User ID**

To search for a User by User ID, enter a User ID and then click the "Search for User" button.

User ID

Search for User

**Search Users**

To search for a User, enter a search criteria (optional) and then click the "Search Users" button.

First Name

Last Name

Check here to limit search to Independent Users

Search Users Cancel

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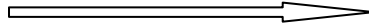


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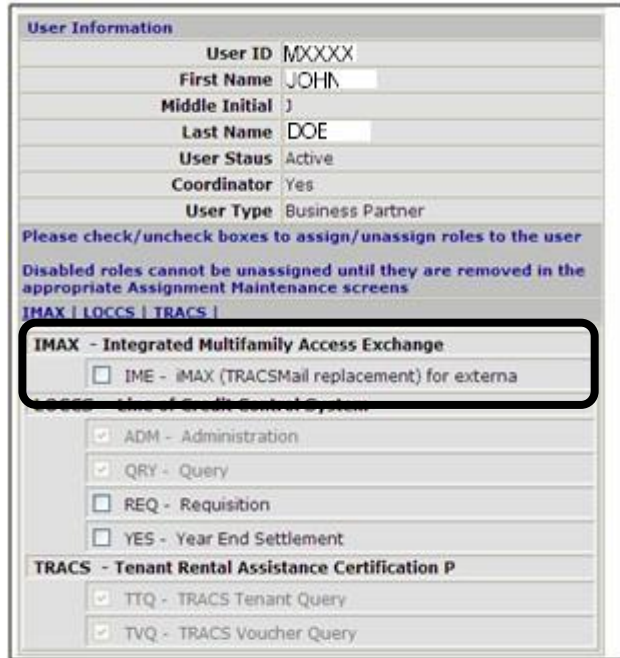
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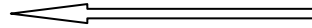
## Step 4 –Open the drop down menu and choose the option to **Maintain User Profile – Roles**.



When you choose this option, you will be taken to the screen that allows you to activate new roles for this user. Please keep in mind that the iMAX role must be set up for the coordinator before the role can be set up for users.



## Step 5 - Click in the box to add a check next to the iMAX option. Then click Submit.



You will be asked to confirm your addition. Once that is done, you will get a message saying that the role was assigned successfully. This must be done for each user who will send and receive TRACS transmissions.

If your software uses the system to system interface (explained below), it takes 24 to 48 hours, after the iMAX role is assigned, for the coordinator or user to be able to send TRACS files. This is because the user must be added to the iMAX working group.

## How Information Is Transmitted Using iMAX

iMAX incorporates two different interfaces.

1. Web browser graphical user interface
2. System to system interface using vendor software

**IF YOU DO NOT KNOW WHICH INTERFACE YOUR PRODUCT USES, CONTACT YOUR SOFTWARE VENDOR OR CHECK THE SOFTWARE VENDOR WEB SITE. HUD'S MULTI-FAMILY HELP DESK STAFF DOES NOT NECESSARILY KNOW THIS INFORMATION. ROSS BUSINESS DEVELOPMENT (RBD) STAFF DOES NOT NECESSARILY KNOW THIS INFORMATION EITHER. PLEASE CONTACT THE SOFTWARE VENDOR FOR THIS INFORMATION.**

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**System to System Interface:** In products like, Bostonpost, Classic, Cornerstone, HUDControl, iCAM, Management Plus, OneSite, and Voyager 6008x, you access the TRACS option in the software and create TRACS files and then send the TRACS file. These solutions have an internal option you can choose to “Send TRACS files” and then the software prompts you to enter your MID and password. When using the system-to-system interface, all “send” and “receive” tasks are done for you, in the software. When using the system-to-system interface, **there is no need to access iMAX through Secure Systems** unless you are updating your iMAX profile or changing the password. DO NOT update the iMAX profile or change the iMAX password until all properties in the portfolio have converted to iMAX.

**Web Browser Interface:** In products like CAM II, HUDManager 2000, and Voyager versions prior to 6008, you access the TRACS option in your software to create TRACS files. Once the TRACS file is created, you must log in to Secure Systems with your M-ID and password, click on the iMAX link and provide the property's TRACSMail ID and TRACSMail password (this is **NOT** your MID and password) and then begin the process to send TRACS files to HUD or to your Contract Administrator. This is called the web browser graphical user interface. Instructions to send TRACS files and receive TRACS messages using the web browser graphical user interface should be available from your software vendor or you can access the iMAX User Guide at <http://www.hud.gov/offices/hsg/mfh/trx/pdf/imaxuserguide.pdf>

*NOTE: If you have ever sent TRACS files to HUD or the contract administrator, then your property has a TRACSMail ID and TRACSMail password. If you do not know your TRACSMail ID and TRACSMail password, check the set up information in your current software to see if it is available there.*

IF YOU HAVE FOLLOWED THE SETUP STEPS ABOVE AND ARE USING YOUR SOFTWARE VENDOR'S INSTRUCTIONS, but you are having problems establishing a connection between your software and iMAX, check with your software vendor first and then contact the multi-family help desk at 800-767-7588.

### Other Resources

If you are new to Secure Systems and need information about set up from beginning to end, we suggest you access the Guide to HUD's Online Systems available from the HUD/TRACS/Documents web site at <http://www.hud.gov/offices/hsg/mfh/trx/pdf/securityaccesswass.pdf>

For those of you who wish to contact a consultant to assist you in establishing your Secure Systems access, we can offer two recommendations.

PMCS, Inc.  
829 West Genesee Street  
Syracuse, NY 13204  
Toll Free 1-800-245-PMCS  
Matt Simon @ extension 1535  
Email: [solutions@pmcs-icap.com](mailto:solutions@pmcs-icap.com)

Murphy Consulting Services  
111 Marburth Avenue  
Towson, Maryland 21286  
Denise Murphy

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[www.rbdnow.com](http://www.rbdnow.com)

[www.MurphyConsultingSvs.com](http://www.MurphyConsultingSvs.com)

410-821-6953 office / fax

410-446-3346 cell

### Additional Information

**Special Note for those of you who have contracted with a service bureau to send and receive TRACS information:** If you use a Service Bureau to send and receive TRACS transmissions, the service bureau representative will use his/her own M-ID and password and already has your TRACSMail information.

Please keep in mind that the implementation of iMAX and TRACS 202C is generating high call volume at the Multi-family Help Desk. The Help Desk staff is working diligently to respond to all inquiries.

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