

TRACS Access Quick Start



Ross Business Development, Inc.
3134 Shumard Way
Marietta, GA 30064
770-424-1806
www.rbdnow.com
info@rbdnow.com

Types of Users

There are two types of WASS users: **Coordinators** and **Users**. The Coordinator serves as the property's Executive Director's representative in controlling access to the system and performing other system administration functions. The Coordinator controls which Users have access to review or submit data. This is true for TRACS, EIV, REAC, APPS, etc.

Each management company must designate a Coordinator (*preferably at least two*), typically an employee, to act as their representative in providing system access to Users. The Coordinator is then responsible for retrieving a user ID for the User, establishing the User's role in the system, assigning the User to the properties, and providing the User with their user ID.

A Coordinator can see data and perform any functions that a User can perform. Therefore, if an individual will be responsible for system administration and will also view data, the individual should register as a Coordinator.

Although a User can review data (e.g., financial or management), they cannot control access to the system. A User depends on the Coordinator to provide or terminate the necessary system rights to prepare, review, or submit data.

As noted in the Rules of Behavior, it is a crime, punishable by law, to share MID/password combinations. People who need access to WASS, should use their own ID and password. Never share passwords.

TRACS data is available to those Coordinators and Users who have responsibility related to the certification of residents or the submission and monitoring of property vouchers. In order to effectively manage the TRACS submission process, PHA/OAs are required to monitor activity recorded in the TRACS database.

This document provides "quick" step-by-step instruction explaining how to set up TRACS access.

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.

TRACS Access Quick Start

Obtaining Access to TRACS & iMAX Through WASS

#1 - Request a Coordinator M-ID (an ID must be obtained for **each** coordinator and **each** user). Each User must request their own ID. <https://www.hud.gov/reac/registration>.

If you are a Coordinator, you will be required to provide a Tax ID that will be used to associate your you must activate the Business Partner Relationship for all properties and set up roles, actions and property assignments. For additional information about obtaining access to Secure Systems, which includes 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 <https://www.hud.gov/reac/wass-user-manual>.

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 Multifamily Help Desk team.)** The best way to reach the Multifamily Help Desk is tracs@hud.gov or Multifamily Housing Phone: (888) 297-8689.

If you already have a coordinator M-ID, and are assigned to the properties for which you want to act as the TRACS 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 TRACS coordinator, you must upgrade the user ID to a coordinator ID before you can become the TRACS Coordinator (you do not have to be a coordinator to access TRACS data only to grant access rights to other users). Customers may call the Technical Assistance Center Monday through Friday, 7:00am - 8:30pm EST. **(Please note that their phone options changed as of February 2024. Click [here](#) to see options.)**

PIH-REAC Technical Assistance Center
Phone: 1-888-245-4860
Fax: 202-485-0280

You may also reach us through email at REAC_TAC@hud.gov. You will receive a response by return email or telephone.

#2 The Coordinator must complete the setup for his/her ID before the Coordinator can begin setting up users. Follow the steps below to obtain TRACS and iMAX access for the coordinator.

For the Coordinator:

- A. Log in to Secure Systems
- B. Go to User Maintenance

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.

TRACS Access Quick Start

- C. Enter your MID
- D. Click Find User. Your information will appear.
- E. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- F. Choose the option “Maintain User Actions”
- G. See if the TRACS Actions are checked. If not, go ahead and check them
- H. Click Submit
- I. Confirm your choices
- J. You should return to your User Maintenance screen
- K. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- L. Choose the option “Maintain User Roles”
- M. **DO NOT MODIFY ANY EIV SETTINGS Unless you are moving from PIH to MFH. Refer to the EIV Quick Start for additional information about this process.**
- N. Check the iMAX option
- O. Click on the checkbox next to the iMAX option so that there is a check in the box
- P. Click on the checkbox next to the TRACS Voucher and Certifications options so that there is a check in the box
- Q. Click Submit
- R. Confirm your choices
- S. You should return to your user information
- T. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- U. Choose the option “Property Assignment Maintenance”
- V. Your MID should default in the proper field at the top of the screen (if not, enter your MID)
- W. Click submit
- X. A list of roles should appear at the top of the screen
- Y. Highlight all roles as appropriate
- Z. A list of properties should appear at the bottom of the screen
- AA. Highlight all properties as appropriate
- BB. Click submit
- CC. Confirm your choices
- DD. Return to the Secure Systems Main Menu
- EE. You should see a TRACS Option and an iMAX option
- FF. Click on the integrated Multi-family Access Exchange System (iMAX) link **or** the Tenant Rental Assistance Certification Link the Rules of Behavior (ROB) page should appear automatically. (both of these systems share the same ROB so it only has to be completed once per year)
- GG. Review the Rules of Behavior
- HH. Accept or Return to the Secure Systems Main Menu
- II. If you accepted the TRACS Rules of Behavior, print the ROB
- JJ. Sign and date the ROB
- KK. Maintain the ROB in a file to be available to HUD or HUD’s reviewers upon request (usually during the Management & Occupancy Review)

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.

TRACS Access Quick Start

#3 Once Coordinator setup is complete, the Coordinator can establish access for individual Users. Follow the steps below to establish TRACS and iMAX access for individual users.

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.

TRACS Access Quick Start

For the User:

- A. Log in to Secure Systems
- B. Go to User Maintenance
- C. Enter the User's MID
- D. Click Find User
- E. The User's information will appear
- F. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- G. Choose the option "Maintain User Actions"
- H. See if the TRACS Action is checked. If not, go ahead and check it
- I. Click Submit
- J. Confirm your choices
- K. You should return to your User Maintenance screen
- L. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- M. Choose the option "Maintain User Roles"
- N. Click on the checkbox next to the iMAX option so that there is a check in the box
- O. Click on the checkbox next to the TRACS Voucher and Certifications options so that there is a check in the box
- P. Click Submit & Confirm your choices
- Q. You should return to the user's information
- R. Click on the arrow next to the drop-down menu at the bottom of the dialogue box
- S. Choose the option "Property Assignment Maintenance"
- T. The user's MID should default in the proper field at the top of the screen (if not, enter the user's MID)
- U. Click submit
- V. A list of roles should appear at the top of the screen
- W. Highlight roles as appropriate
- X. A list of properties should appear at the bottom of the screen
- Y. Highlight properties as appropriate
- Z. Click submit and Confirm your choices
- AA. Return to the Secure Systems Main Menu

At this point, TRACS setup for this User is complete. The final steps must be performed by the user.

- BB. When the User logs on to Secure Systems (he/she) should see a TRACS Option and an iMAX option
- CC. The User must click on the integrated Multi-family Access Exchange System (iMAX) link **or** the Tenant Rental Assistance Certification Link (both of these systems share the same ROB so it only has to be completed once per year)
- DD. The user must review the Rules of Behavior
- EE. The user must Accept or Return to the Secure Systems Main Menu
- FF. If the user accepted the TRACS Rules of Behavior, the user must print the ROB

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.

TRACS Access Quick Start

GG. The user must sign and date the ROB and maintain the ROB in a file to be available to HUD or HUD's agents upon request (usually during the Management & Occupancy Review)

Management and Occupancy Review (MOR) Reviewers may ask you for copies executed Rules of Behavior for anyone who transmits TRACS files using iMAX or who access TRACS Queries in HUD's Secure Systems.

TRACS and iMAX will prompt Coordinators and Users to accept the TRACS ROB every year.

NOTE: You are an External User. Signed TRACS Rules of Behavior and Security Awareness Training Certificates are subject to review and audit at any time by HUD staff and/or HUD's representatives with oversight and monitoring responsibilities, and must be available upon request. Do not send the ROB to HUD.

If you did not print or retain the ROB, you can obtain a new TRACS Rules of Behavior form from HUD's TRACS web site at <https://www.hud.gov/sites/documents/TRACSR0B.PDF>. If you did not print a copy of the ROB when you accessed the TRACS system:

- 1) Print a new copy
- 2) Sign it and
- 3) Keep it on file so that you can provide it to HUD or your CA upon request

#4 All Coordinators and Users must complete the TRACS Security Awareness Training. If you send TRACS files you are required to take Security Awareness Training (Cyber Awareness Challenge) annually as mandated by the Federal Information Security Management Act (FISMA) and Office of Management and Budget (OMB) Circular A-130.

To complete the Cyber Awareness Challenge for Federal Employees which is the required online Security Awareness training (this is an annual requirement for coordinators, users and staff who have access to EIV reports):

- Open your web browser
- Go to <https://www.cyber.mil/cyber-awareness-challenge>
- Upon course completion, you will be prompted to save a PDF version of your certificate and print a certificate confirming you completed the course. If you are unable to save or print the certificate, press Alt + Print Screen, open a word document, right click, paste, print, sign and file the certificate.
- You must file the certificate each year and make it available for your next MOR

RBD does not act as a legal advisor nor as a regulatory governing agency. The recipient should understand that any materials or comments contained herein are not designed for, nor should be relied upon as a source of legal guidance or as a final authority with respect to any particular circumstance. Ross Business Development, Inc. makes no warranty of merchantability or fitness for a particular purpose or any other warranty of any type. Owners and management should seek competent legal advice in developing and carrying out policies and procedures. While we have been diligent in our efforts to provide comprehensive and accurate regulatory information, Ross Business Development, Inc. shall not be responsible for errors or inaccuracies.