

TRACS Recertification Internet User's Guide

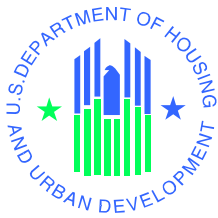
Tenant Rental Assistance Certification System (TRACS)

U.S. Department of Housing and Urban Development

July 2017

Revision Sheet

Release No.	Date	Revision Description
Rev. 1	February 2017	Draft User Guide
Rev. 2	July 2017	Update based on UAT feedback



TRACS Recertification Internet User's Guide Authorization Memorandum

I have carefully assessed the User's Manual for TRACS Re-certification. This document has been completed in accordance with the requirements of the HUD System Development Methodology.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

TRACS RECERTIFICATION INTERNET USER'S GUIDE

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1.0 TRACS RE-CERTIFICATION

With the implementation of the TRACS Recertification functionality, authorized users can maintain and run a report of all users for which they are responsible, request user access removal, submit recertification request, as well as manage and unlock these user IDs.

The following access roles are required:

Role Code	Role Description	CA RFP Code
TCC	TRACS Coordinator	B
TCR	TRACS Coordinator Re-cert	B

When users access the ROB, iMAX, iMAX Admin, TRACS Main Menu, or iMAX Web services, the system will check for the last time they logged in. If it has been more than 90 days since their last activity, the user will be locked out (unless the account has been unlocked). Authorized users will now have more control of access.

From the TRACS menu, select the “TRACS Recertification” link under TRACS Subsystem, which will appear if you have the appropriate role. The Re-certification options will vary based on the user role.

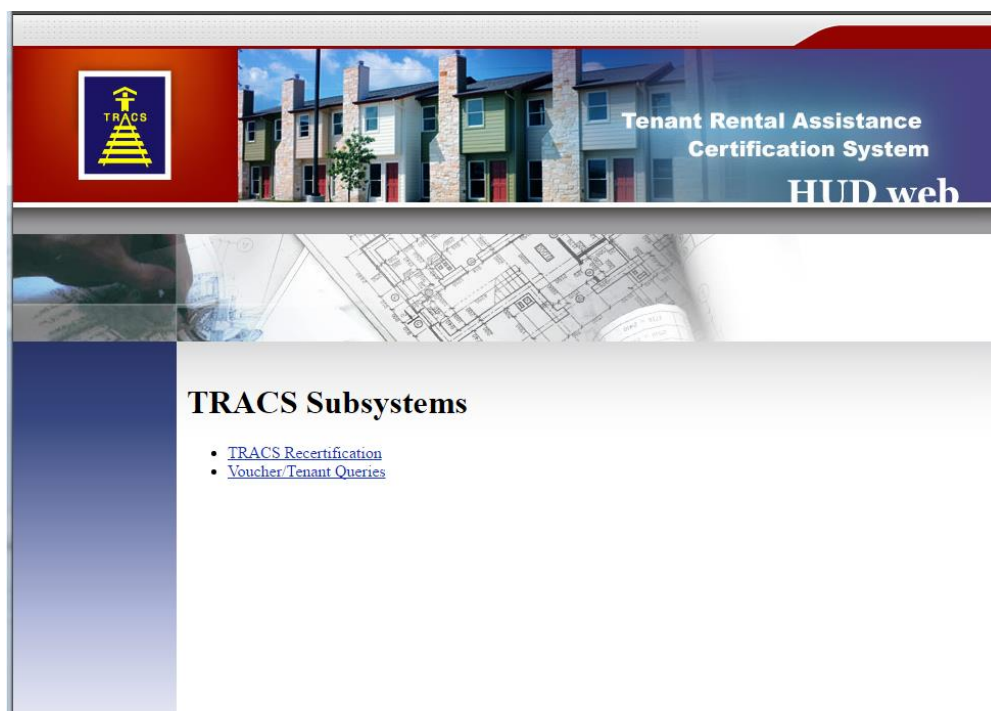


Figure 1-1: TRACS Main Menu

1.1 GENERATE REPORT AND UNLOCK

TRACS coordinators with the TCC role are able to generate a report listing the last logins for all users assigned to them and unlock their accounts, if needed. Click the “User Last Login Report and Unlock Users” link to access the report.

User Last Login Report and Unlock Users

☐ Show locked users only [Unlock Users](#)

Filter by User Id or Name
Search:

	User Id ▲	Name	Email	Last Login	Unlocked Date	Unlocked By	Account Locked
<input type="checkbox"/>	M22D24	TEST, TEST		2017-01-30			No
<input type="checkbox"/>	M22D35	TEST, TEST		2017-01-30			Yes

Showing 1 to 2 of 2 entries Previous **1** Next

Figure 1-2: User Last Login Report and Unlock Users Screen

To unlock user accounts, select the check box next to the appropriate user ID(s) and select the “Unlock Users” button at the top of the report.

☐ Show locked users only [Unlock Users](#)

	User Id ▲	Name
<input type="checkbox"/>	M22D24	TEST, TEST
<input type="checkbox"/>	M22D35	TEST, TEST

Showing 1 to 2 of 2 entries

Figure 1-3: Unlock Users

Users can also filter the list to display only accounts that are currently locked by checking the box at the top left of the report labeled “Show locked users only”.

☐ Show locked users only [Unlock Users](#)

Figure 1-4: Show locked users only

The search function allows users to find specific accounts by entering the full/partial M-ID into the search box at the top right of the report to narrow the results.

Filter by User Id or Name

Search:

Unlocked By Account Locked

Figure 1-5: Search for specific accounts

1.2 ADD, VIEW, DELETE ASSIGNED STAFF

Users with the TCR role will have access to the Add/View/Delete Assigned Staff functionality to manage account relationships.

1.2.1 View Assigned Staff

Staff assigned to the active user will be viewable in the list on the Add/View/Delete Assigned Staff screen.

Add/View/Delete Assigned Staff

Staff ID: Coordinator ID: M00000

Filter by User Id or Name

Relationship of assigned staff reporting to Coordinator created by you

Search:

User Id	Name	Reports To
M22D24	TEST, TEST	M00000 (ANONYMOUS, ANON)
M22D35	TEST, TEST	M00000 (ANONYMOUS, ANON)

Showing 1 to 2 of 2 entries

Previous Next

Figure 1-6: Add/View/Delete Assigned Staff Screen

1.2.2 Add Assigned Staff

To add an assigned staff member, the user must enter the user ID of the staff in the “Staff ID” field at the top of the report and add the Coordinator’s user ID.

Add/View/Delete Assigned Staff

Staff ID: Coordinator ID: M00000

Figure 1-7: Add assigned staff

The staff member will be assigned if the IDs are correct and the user clicks the “Assign Staff to Coordinator” button to initiate the process.

1.2.3 Delete Assigned Staff

Each entry in the report has a button to initiate the process of removing assigned staff from the coordinator. Users must find the account to remove and click the “Delete Relationship” button in the corresponding row.

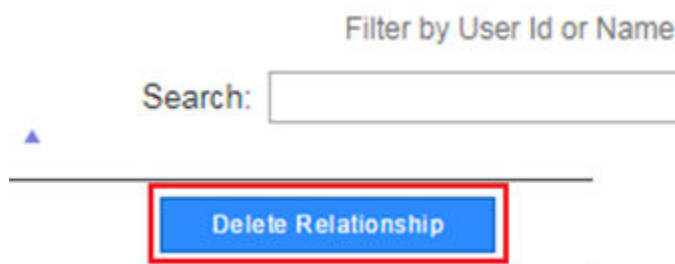


Figure 1-8: Delete assigned staff

1.3 FLAG ACTIONS / ROLES AND REQUEST RECERTIFICATION

Users with any of the roles described above (TCC, and/or TCR) will have access to the “Flag Actions/Roles and Request Recertification” functionality to better manage the users assigned to their account. Click the link to view the report.

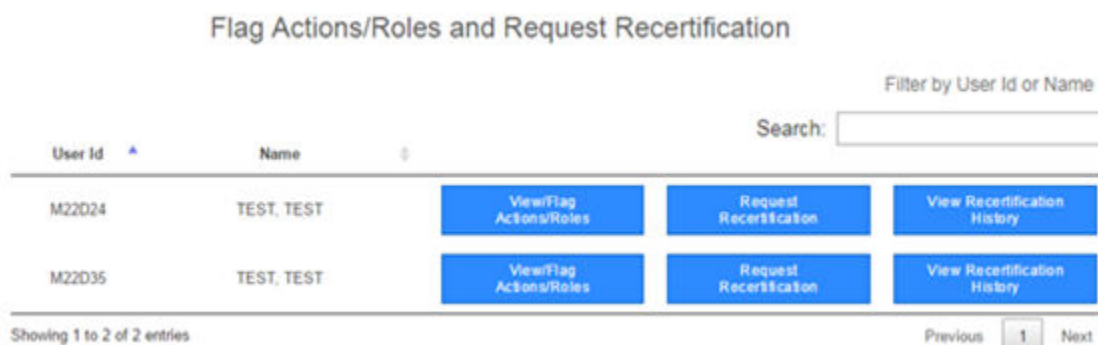


Figure 1-9: Flag Actions/Roles and Request Recertification Screen

1.3.1 View or Flag Actions and Roles

To display which actions and roles are assigned to the users on the report, click on the “View/Flag Actions/Roles” button in the corresponding row.

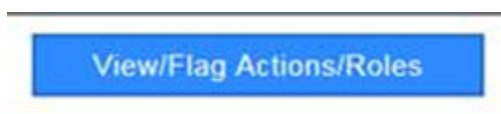


Figure 1-10: View/Flag Action/Roles Button

The Flag Actions and Roles for Removal screen will overlay on the report to display the Actions and Roles assigned to the selected user. It also denotes which Roles have Property Assignment and/or Contract Assignment rights.

Flag Actions and Roles for Removal

close

ANONYMOUS, ANON (M00D00)

Actions: ☐ COR ☐ TVR

Roles: ☐ IME ☐ TCC ☐ TCR

Roles with Property Assignment: None

Roles with Contract Assignment: None

Flagged Actions: None

Flagged Roles: None

Flagged Roles with Property Assignment: None

Flagged Roles with Contract Assignment: None

Flag Actions/Roles

Figure 1-11: Flag Actions and Roles for Removal screen

To request that roles and/or actions be removed from the user, check the boxes next to the appropriate role(s) and click the “Flag Actions/Roles” button.

Flag Actions and Roles for Removal

close

ANONYMOUS, ANON (M00D00)

Actions: ☐ COR ☐ TVR

Roles: ☒ IME ☒ TCC ☐ TCR

Roles with Property Assignment: None

Roles with Contract Assignment: None

Flagged Actions: None

Flagged Roles: None

Flagged Roles with Property Assignment: None

Flagged Roles with Contract Assignment: None

Flag Actions/Roles

Figure 1-12: Flag roles or actions for removal

The system will display a pop-up warning message to prevent accidentally flagging an item.

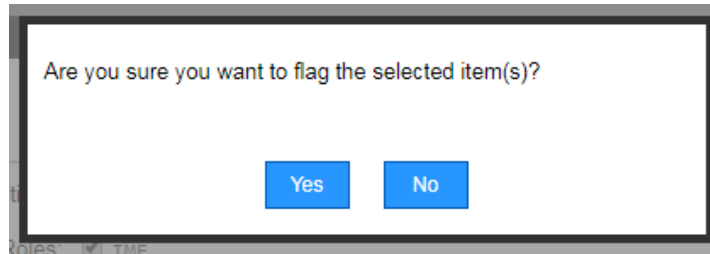


Figure 1-13: Flag warning pop-up

Click “Yes” to process the update(s).

The display will update to reflect the selections and the request will be queued in the system.

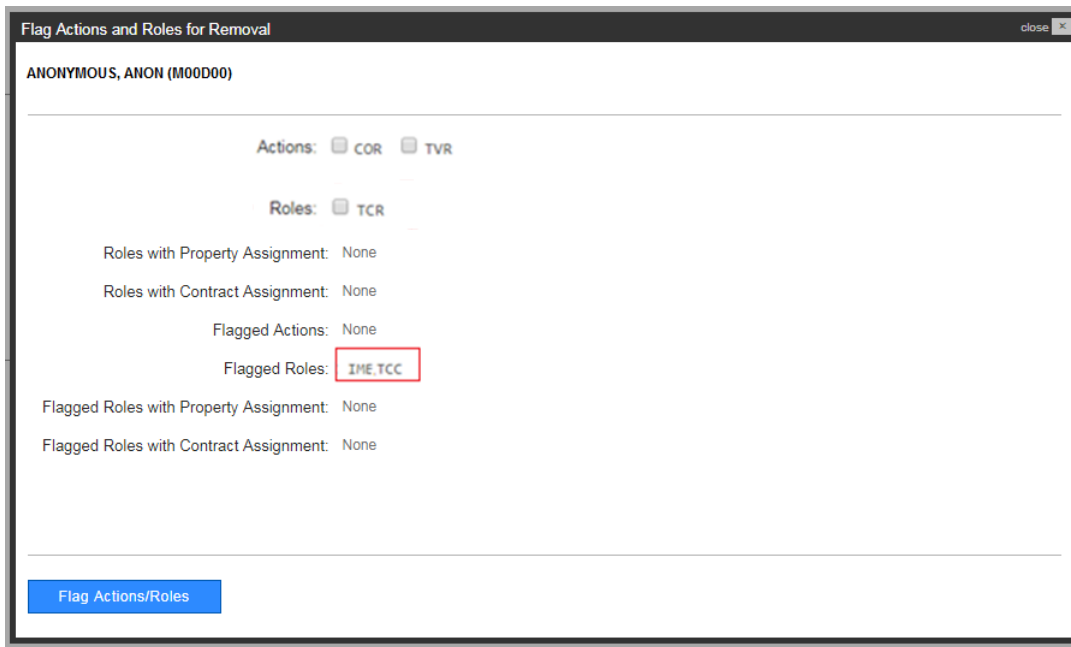


Figure 1-14: Roles and Actions have been flagged for removal

1.3.2 Request Recertification

To request recertification for users on the report, click on the “Request Recertification” button in the corresponding row.

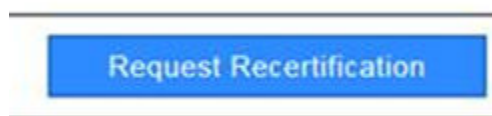


Figure 1-15: Request Recertification Button

1.3.3 View Recertification History

To view a user's recertification history, click on the "View Recertification History" button in the corresponding row.

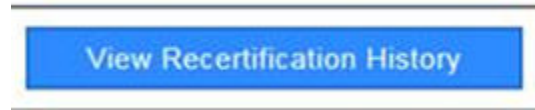


Figure 1-16: View Recertification History