



# **Multifamily TransAccess Records Management User Manual**

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## 1 INTRODUCTION

### Multifamily TransAccess Records Management

TransAccess Records Management (RM) offers an array of features that allows specific users to create inventory, request items, and manage user activity. TransAccess RM affords users ease of use as it pertains to the new user interface and shortcut navigation, making requested items easy to manage.

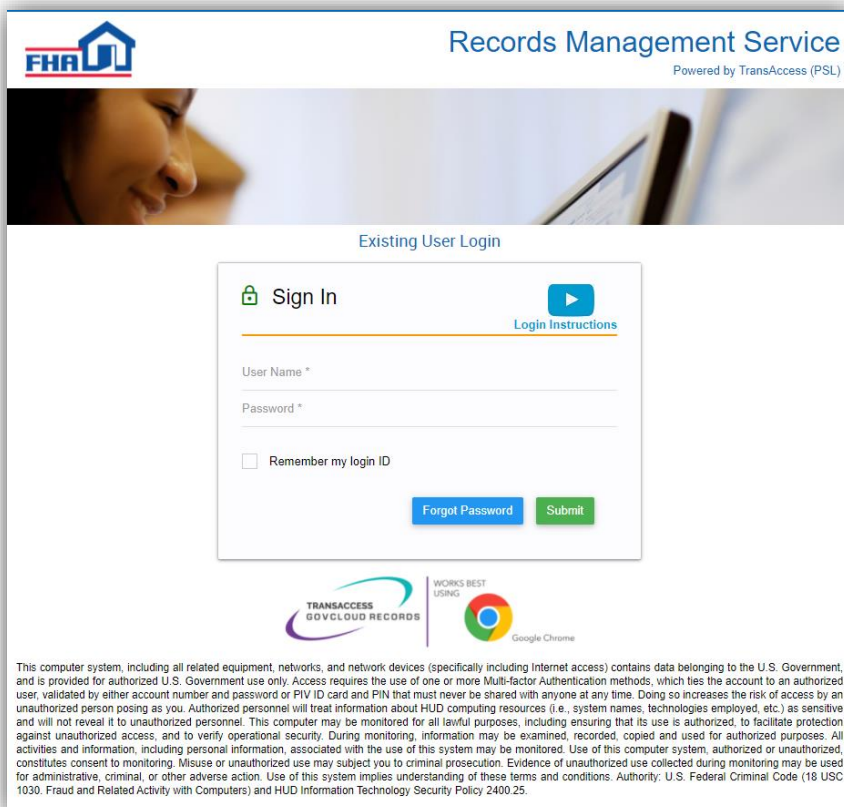
TransAccess RM streamlines the workflow process and converges paper to an efficient process that is easy to use and scalable across Organizational Departments. Peniel Solutions offers a solution that integrates TransAccess RM with the Record Center's Archives and Records Center Information System (ARCIS), which allows feedback between TransAccess RM and ARCIS to occur real-time.

## 2 GETTING STARTED

### 2.1 New User Registration

To gain access to TransAccess Records Management, registration must occur, which is initiated by a designated System Administrator.

#### Existing/New User Login Page



**FHA** **Records Management Service**  
Powered by TransAccess (PSL)

Existing User Login

**Sign In** [Login Instructions](#)

User Name \*

Password \*

☐ Remember my login ID

[Forgot Password](#) [Submit](#)

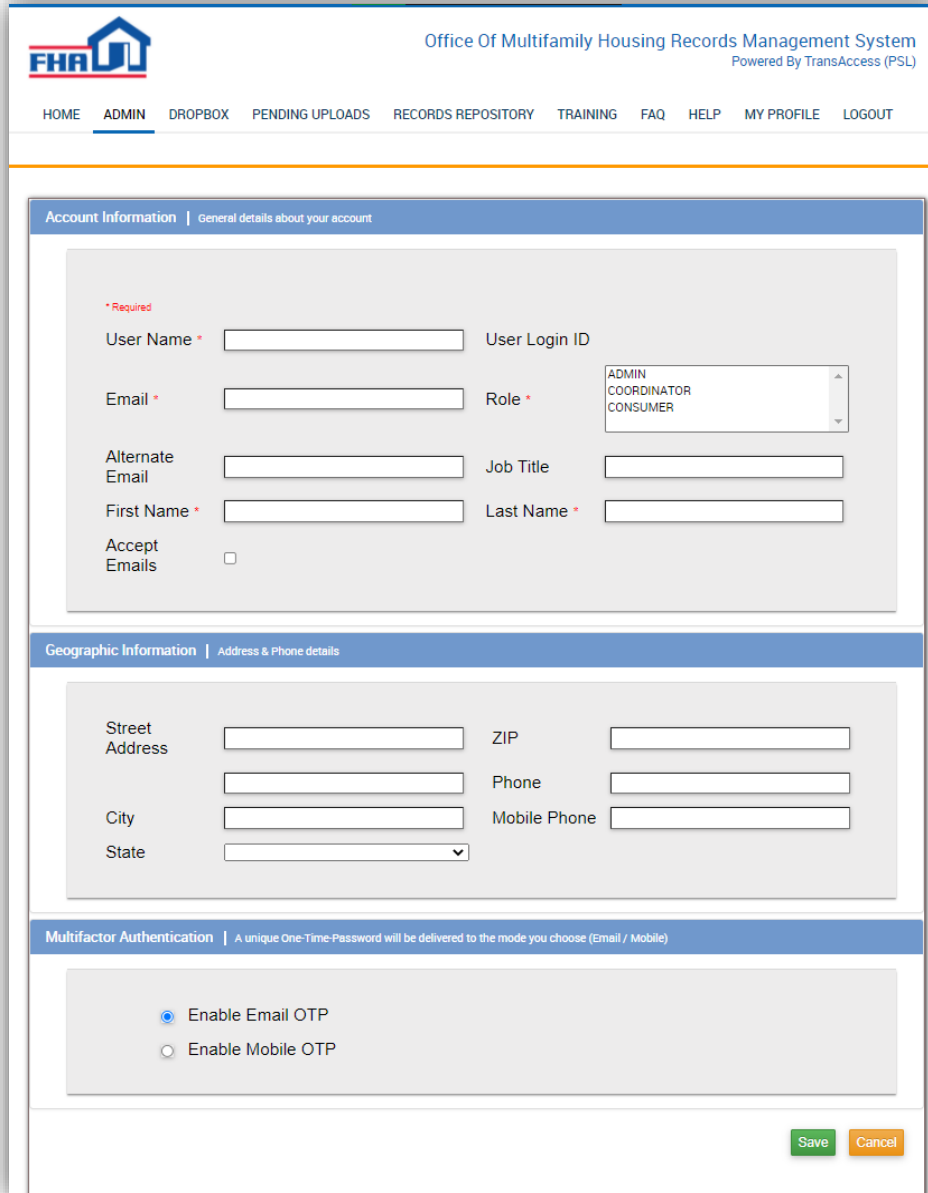
TRANSACCESS GOVCLOUD RECORDS WORKS BEST USING Google Chrome

This computer system, including all related equipment, networks, and network devices (specifically including Internet access) contains data belonging to the U.S. Government, and is provided for authorized U.S. Government use only. Access requires the use of one or more Multi-factor Authentication methods, which ties the account to an authorized user, validated by either account number and password or PIV ID card and PIN that must never be shared with anyone at any time. Doing so increases the risk of access by an unauthorized person posing as you. Authorized personnel will treat information about HUD computing resources (i.e., system names, technologies employed, etc.) as sensitive and will not reveal it to unauthorized personnel. This computer may be monitored for all lawful purposes, including ensuring that its use is authorized, to facilitate protection against unauthorized access, and to verify operational security. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All activities and information, including personal information, associated with the use of this system may be monitored. Use of this computer system, authorized or unauthorized, constitutes consent to monitoring. Misuse or unauthorized use may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal, or other adverse action. Use of this system implies understanding of these terms and conditions. Authority: U.S. Federal Criminal Code (18 USC 1030. Fraud and Related Activity with Computers) and HUD Information Technology Security Policy 2400.25.

## 2.1.1 New User Registration: System Administrator Initiated

The System Administrator has the ability to initiate the registration process; however, the user's account is not activated until the User completes the registration process, which is initiated via email.

### New User Registration Page



**Office Of Multifamily Housing Records Management System**  
Powered By TransAccess (PSL)

HOME ADMIN DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

---

**Account Information** | General details about your account

\* Required

User Name \*  User Login ID

Email \*  Role \* 

ADMIN  
COORDINATOR  
CONSUMER

Alternate Email  Job Title

First Name \*  Last Name \*

Accept Emails ☐

---

**Geographic Information** | Address & Phone details

Street Address  ZIP

Phone

City  Mobile Phone

State

---

**Multifactor Authentication** | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

☒ Enable Email OTP

☐ Enable Mobile OTP

Save Cancel

After the Administrator submits the “New User Registration”, an email is forwarded to the new user to alert him/her of the request.

## Email Request

Greetings,

Your administrator for the Transaccess Imaging System has granted you access. Please take the time to sign in to the application via the link provided below. The link will be valid for 4 days. If you have not activated during this time, your login credentials must be reset. Also included is your permanent user name.

Once you click on the link below you will be prompted to enter in a new password. Please make sure that you keep this information confidential and in a safe place.


User Log In ID: MFHD/H1F5T7

[TransAccess Imaging](#)

## STEPS:

**Step 1.** Access the Email account associated to ‘My User Profile.’ The New User Registration request must be completed within 4 days of System Administration initiation by clicking on the [TransAccess Imaging](#) link found within the Email.

- **Result.** Upon clicking the email link, the User Registration page is presented.



MFHD/H1F5T7

Either this is your first time signing in, or your password has been reset by the Administrator. You must set a new password. Please remember your user sign in ID and new password as you will need both to access the system in the future.

**Your new password must conform to the following password policy:**

- Be different from your user sign in ID and email address.
- Have minimum length of 8 characters and maximum of 32 characters.
- Contain characters from all of the following three categories:
  - English uppercase characters(A...Z)
  - English lowercase characters(a...z)
  - Numeric characters(0,1,2...9) or Non-alphanumeric(For Example,!,\$,#,%)
  - Non-alphanumeric(For Example,!,\$,#,%)

User Sign In ID

MFHD/H1F5T7

New Password \*

Verify New Password \*

Go

**\*=Required Field**

- **User Registration Page**

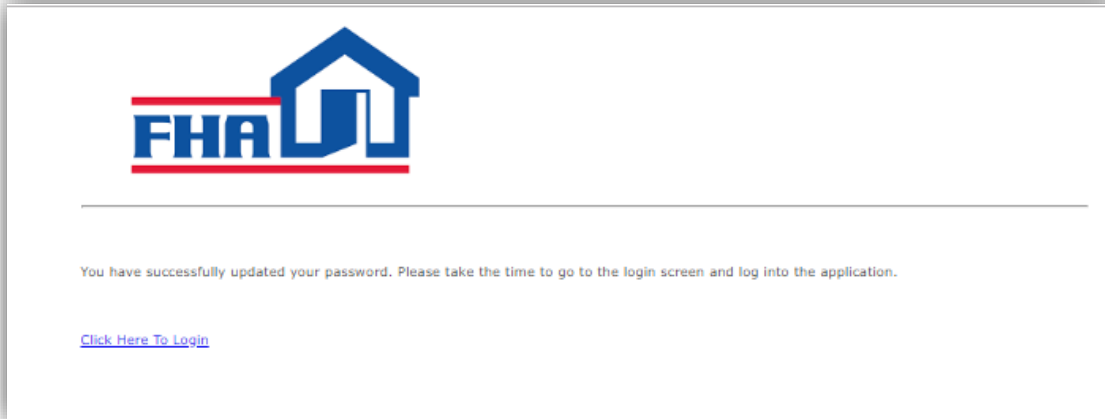
The User Sign In ID field is populated with the registering User's ID. The Password requirements are mentioned on the page to provide guidance to the User.

**Step 2.** Enter new password

**Step 3.** Re-Enter New Password

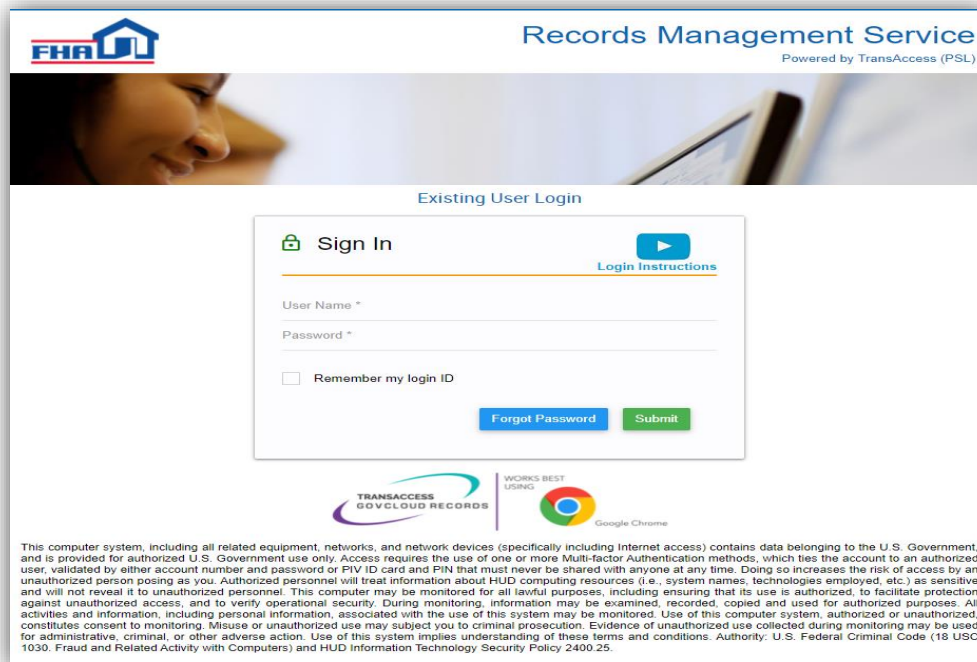
**Step 4.** Click Go

**Result :** Upon click the 'Go' button, User is redirected to Sign In Page



**Step 5.** Click the 'Click Here to Login' link.

**Result.** The TransAccess Records Management Login Page is presented.

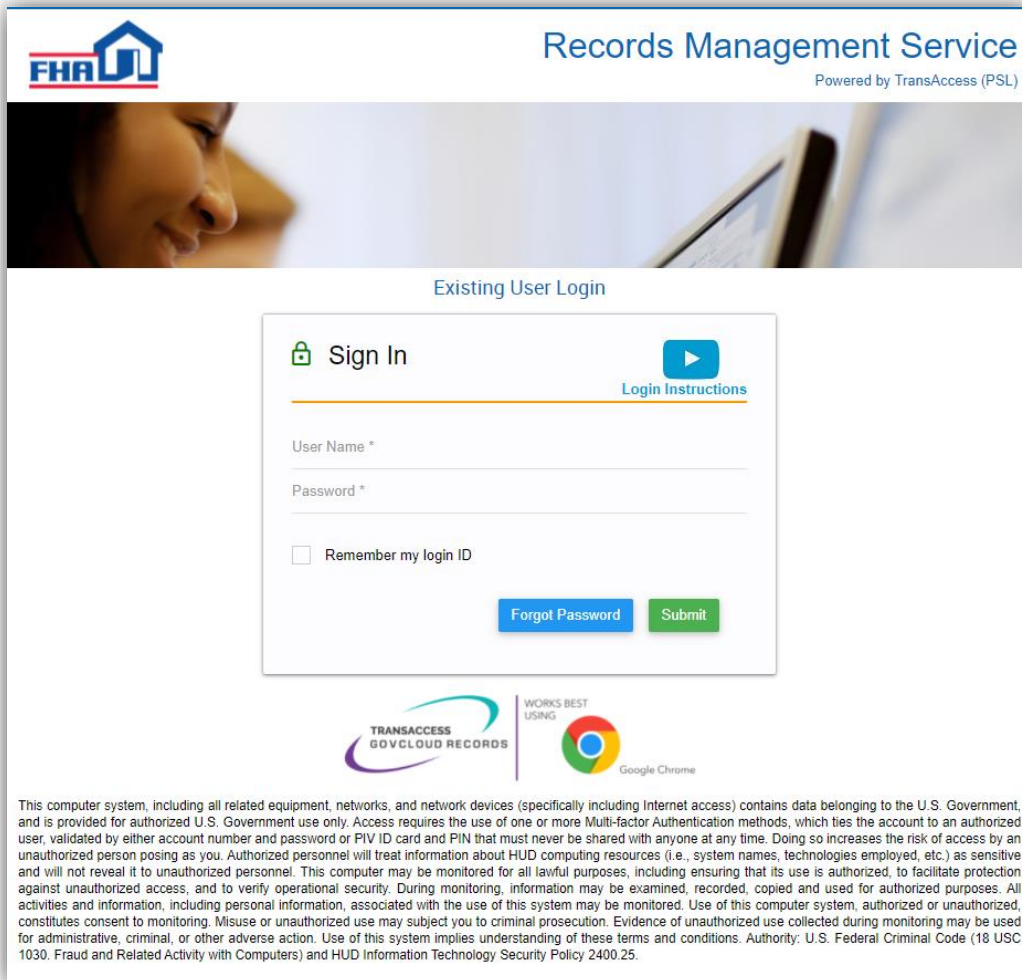


## 2.2 Existing User Login

Logging into TransAccess Records Management provide users secure access to data and processes associated with each privileged User.

After the user has obtained a User Login ID and Password, the process of logging in to TransAccess RM is quite simple and does not involve a System Administrator.

### Existing / New User Login Page



**Sign In**

User Name \*

Password \*

☐ Remember my login ID

[Forgot Password](#) [Submit](#)

[Login Instructions](#)

TRANSACCESS GOVCLOUD RECORDS

WORKS BEST USING Google Chrome

This computer system, including all related equipment, networks, and network devices (specifically including Internet access) contains data belonging to the U.S. Government, and is provided for authorized U.S. Government use only. Access requires the use of one or more Multi-factor Authentication methods, which ties the account to an authorized user, validated by either account number and password or PIV ID card and PIN that must never be shared with anyone at any time. Doing so increases the risk of access by an unauthorized person posing as you. Authorized personnel will treat information about HUD computing resources (i.e., system names, technologies employed, etc.) as sensitive and will not reveal it to unauthorized personnel. This computer may be monitored for all lawful purposes, including ensuring that its use is authorized, to facilitate protection against unauthorized access, and to verify operational security. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All activities and information, including personal information, associated with the use of this system may be monitored. Use of this computer system, authorized or unauthorized, constitutes consent to monitoring. Misuse or unauthorized use may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal, or other adverse action. Use of this system implies understanding of these terms and conditions. Authority: U.S. Federal Criminal Code (18 USC 1030. Fraud and Related Activity with Computers) and HUD Information Technology Security Policy 2400.25.

#### STEPS:

**Step 1.** Enter User Login ID and Password in the appropriate fields.

**Step 2.** Select the 'Remember My User Login ID' checkbox to save your User Login ID on the computer being used to avoid entering the User Login ID upon your next visit to TransAccess RM.

**Step 3.** Click the 'Submit' push button.

**Result:** The Home (Portal) page presented.

## 2.3 Reset Your Password

For Existing Users who forgot their password, the 'Forgot Password' option allows the User to reset/change the password.

### STEPS:

#### Step 1. 'Forgot Password?'

- The 'Forgot Password?' push button navigates the user to the reset page.



Sign In

[Login Instructions](#)

User Name \*

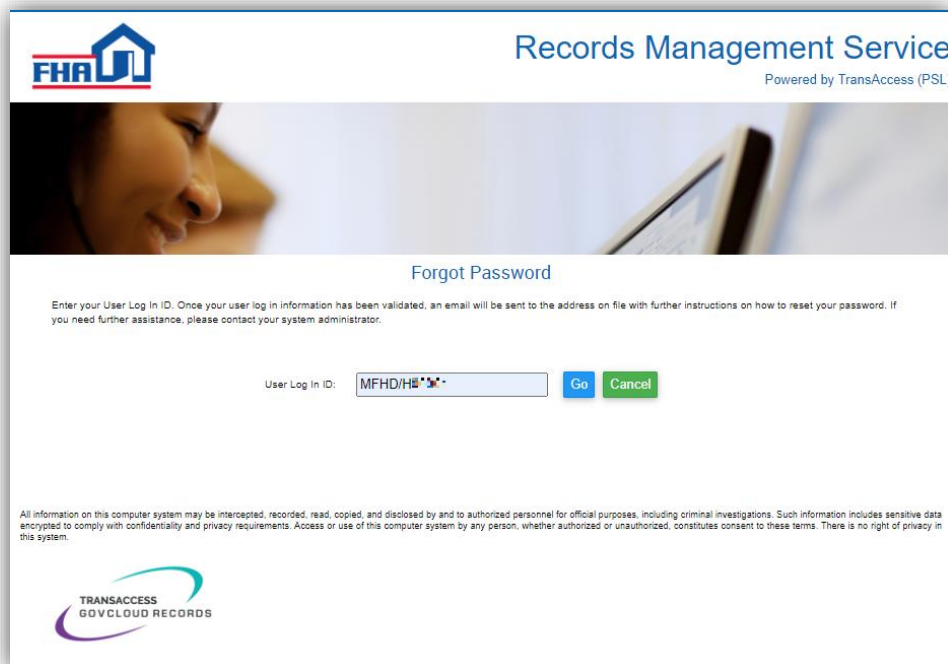
Password \*

☐ Remember my login ID

[Forgot Password](#) [Submit](#)

**Step 2.** Enter your User Login ID in the appropriate field.

**Step 3.** Click the 'Go' button.



**FHA**

**Records Management Service**  
Powered by TransAccess (PSL)

**Forgot Password**

Enter your User Log In ID. Once your user log in information has been validated, an email will be sent to the address on file with further instructions on how to reset your password. If you need further assistance, please contact your system administrator.

User Log In ID:  [Go](#) [Cancel](#)

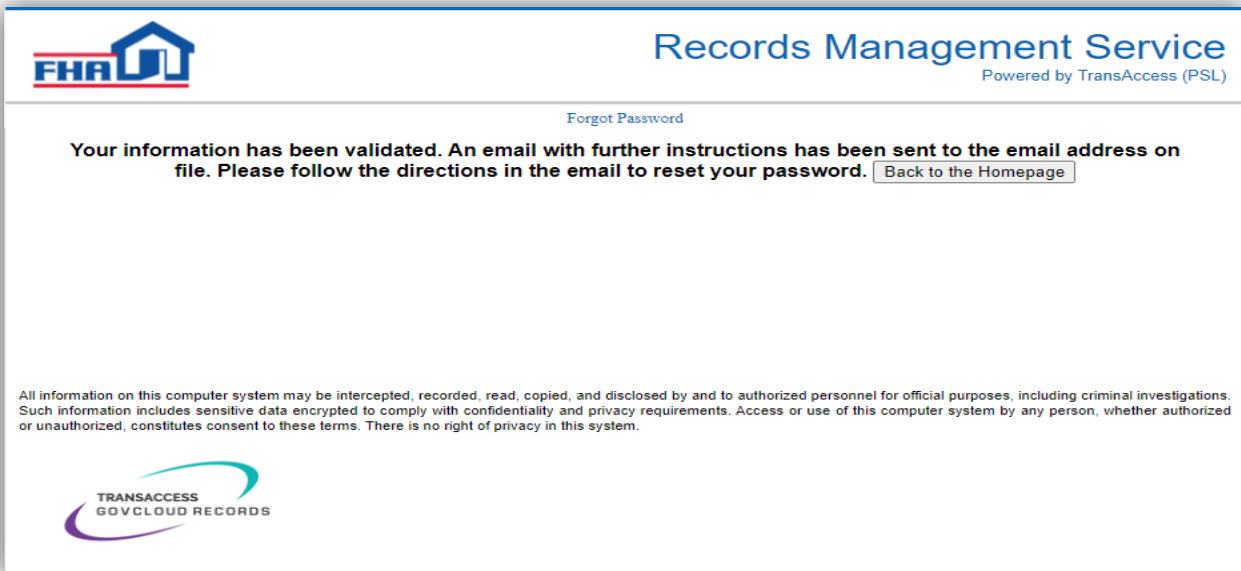
All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

**TRANSACCESS**  
GOVCLOUD RECORDS

**Result.** A Confirmation Message is presented indicating information has been validated, and an email is forwarded instantly to the User's email address to complete the password-reset process.



## Forgot Password Confirmation message




## Forgot Password Email Notification

Greetings,

Your account has been disabled. Please take the time to click the link provided below within 4 days.

Once you click on the link below you will be prompted to enter in a new password. Please make sure that you have this information in a safe place.

User Log In ID: MFHD/H

[TransAccess Imaging](#)

**Step 4 .** Click the [TransAccess Imaging](#) link within the email.

**Result.** The 'Forgot Password' page is presented. (Same as create password)



MFHD/H

Either this is your first time signing in, or your password has been reset by the Administrator. You must set a new password. Please remember your user sign in ID and new password as you will need both to access the system in the future.

**Your new password must conform to the following password policy:**

- Be different from your user sign in ID and email address.
- Have minimum length of 8 characters and maximum of 32 characters.
- Contain characters from all of the following three categories:
  - English uppercase characters(A...Z)
  - English lowercase characters(a...z)
  - Numeric characters(0,1,2...9) or Non-alphanumeric(For Example,!,\$,#,%)
  - Non-alphanumeric(For Example,!,\$,#,%)

User Sign In ID

MFHD/H

New Password \*

Verify New Password \*


Go

*\*=Required Field*

**Step 5.** Enter your new Password and Verify New Password.

**Step 6.** Click GO.

**Result.** Reset Password Confirmation Message is presented.



You have successfully updated your password. Please take the time to go to the login screen and log into the application.

[Click Here To Login](#)

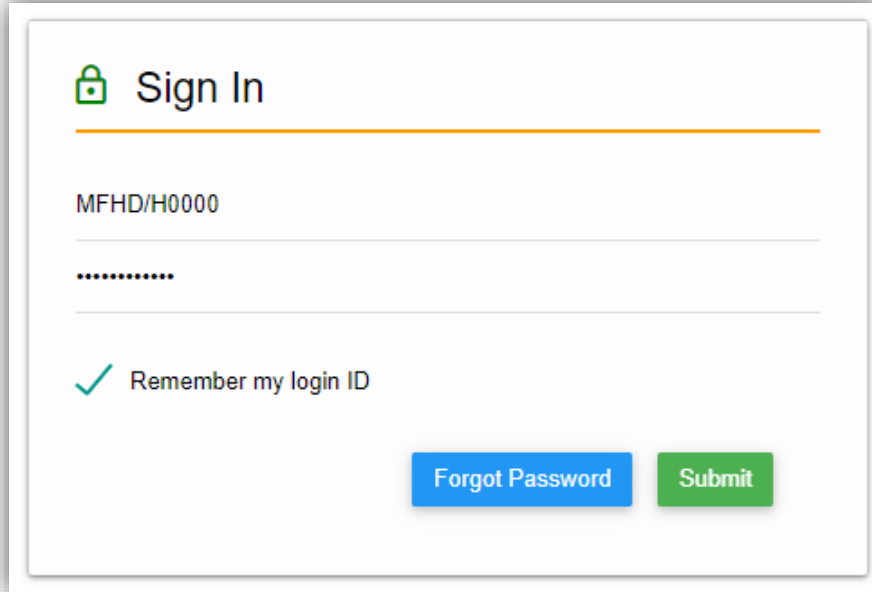
**Step 7.** Upon selecting the '[Click Here To Login](#)' link, the TransAccess RM Login Page is presented. The user can now log in with his/her newly established password.

## 2.4 Multifactor Authentication

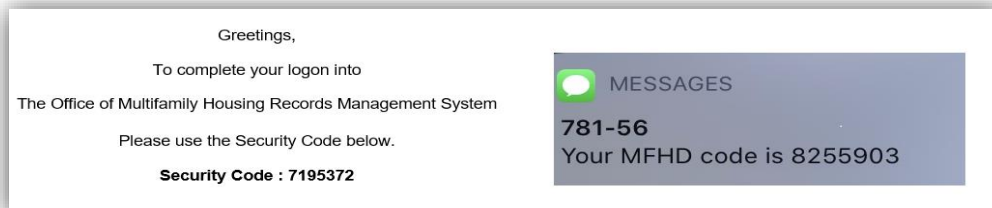
Logging into TransAccess Records Management System will require users to input a unique One-Time-Password. That password will be delivered to the User's HUD Email, or a HUD approved mobile number.

**STEPS:****Step 1. 'Enter User ID & Password'**

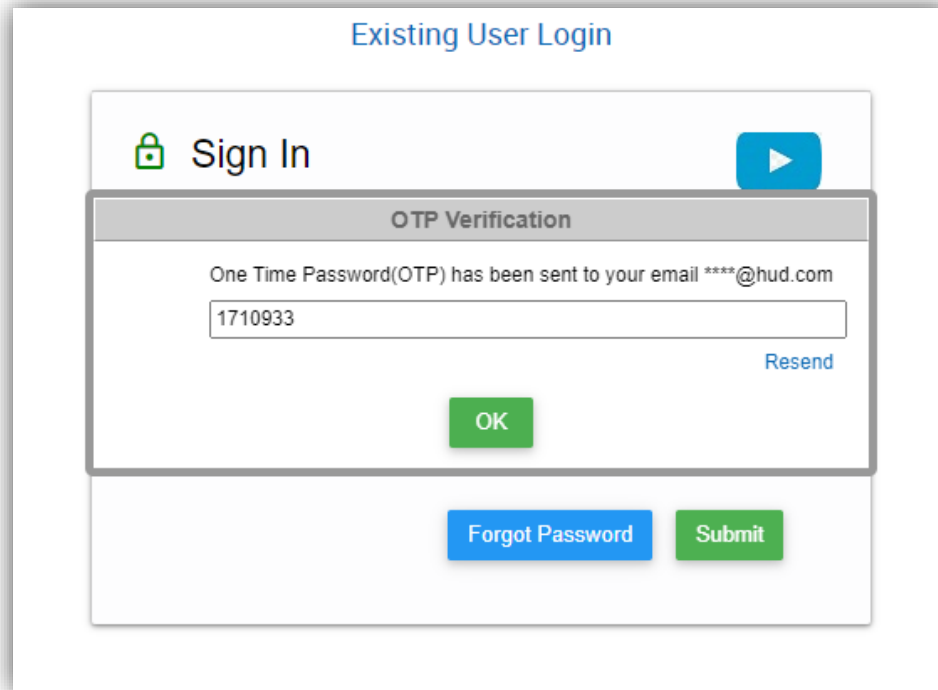
1. You will enter your User ID and Password and click 'Submit'.

A screenshot of a web form titled "Sign In" with a lock icon. It contains two input fields: the first is labeled "MFHD/H0000" and the second is a password field with masked characters. Below the password field is a checkbox with a checkmark icon and the text "Remember my login ID". At the bottom right are two buttons: "Forgot Password" (blue) and "Submit" (green).**Step 2. 'Email OTP & Mobile OTP'**

- Remember, or copy the unique One-Time-Password that was delivered to your Email or Mobile phone.

A screenshot of an email message. The text on the left reads: "Greetings, To complete your logon into The Office of Multifamily Housing Records Management System Please use the Security Code below. Security Code : 7195372". On the right is a grey box with a green speech bubble icon, the word "MESSAGES", the number "781-56", and the text "Your MFHD code is 8255903".**Step 3. 'Sign In'**

- Type or paste the One-Time-Password that was sent to you, in the box labeled '**OTP Verification**' and click OK.



Existing User Login

Sign In

OTP Verification

One Time Password(OTP) has been sent to your email \*\*\*\*@hud.com

1710933

Resend

OK

Forgot Password Submit

## 2.4.1 Setting Multifactor Authentication preference

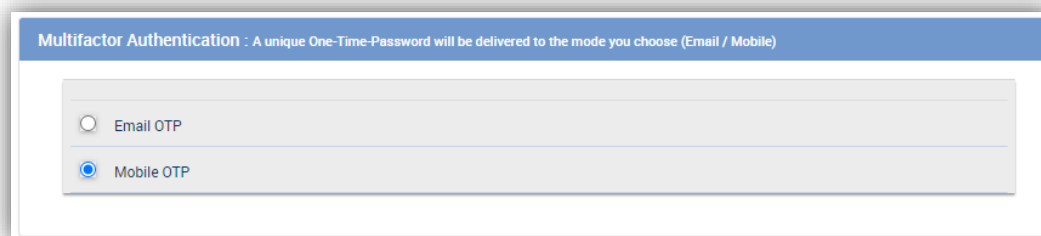
### STEPS:

#### Step 1. 'Visit the (My Profile) Tab'

- After logging in, click on the tab **'My Profile'** on your quick navigation toolbar.

#### Step 2. 'Geographic Information & Multifactor Authentication.'

- If you would like to use your Email as the mode to receive your One-Time-Password, no additional steps are needed. Email is the default choice. To choose Mobile OTP, first input your Mobile number in the section 'Geographic Information'. Then, go to the section 'Multifactor Authentication' and choose **Mobile OTP** and save.



Multifactor Authentication : A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

☐ Email OTP

☒ Mobile OTP

### 3 HOME PAGE

The Home page offers convenience to the User by providing shortcut links to navigate to commonly used and critical areas within the application. Learn about the different types of Records by a downloadable link, upload any new Records and also see the list of pending Records associated with the user account.

#### Home Page



#### 3.1 Link to Download Latest Record Types

A Link is provided to download the list of Records that are allowed to be uploaded into the RMS. This is provided for the convenience of the user.


Upon clicking the link, the system will download a Microsoft Excel spreadsheet with all the different types of Records. Below you can find a screenshot depicting the same.

	A	B
1	Document Type ID	Document Type
2	1	1044 D Payment Information Treasury Financial
3	718	1199A Direct Deposit
4	424	214 Transfer Approvals
5	2	2205 A Mortgagors Cost Certification
6	3	2283 Financial Requirements for Closing
7	4	2328 Contractors and Mortgagors Cost Breakdown
8	5	2400 Certificate of Closing Attorney Legal Requirements
9	7	2415 Request for Permission to Commence Construction
10	8	2449 Final Inspection Report
11	9	2456 Escrow Deposit Agreement
12	10	2500 Reservation of Rent Supplement Contract
13	11	2530 Previous Participation
14	12	2537 Mortgagees Application for Partial Settlement
15	13	2576 HF Certificate of Need or Market Study for 232 242
16	786	27038 Official Receipt of FHA Initial Premium
17	14	2742 Fiscal Data in Support of Claim for Insurance Benefits
18	15	2744 A Allocation of Mortgage Receipts and Disbursements
19	16	2744 C Mortgagees Report of Project Disbursements
20	17	2744 D Other Disbursements by Mortgagee
21	18	2744 E Mortgagees Report of Special Escrow
22	19	2747 Mortgagees Application for Insurance Benefits
23	457	2771 Statement of Multifamily Mortgage
24	787	27927 Final Settlement Statement
25	593	2880 Applicant/Recipient Disclosure/Update Report
26	20	290 Final MF Closing Memorandum
27	21	3107 Effective Date of Interest Reduction Payment Contract
28	22	3126 Preliminary Reservation of Contract Authority
29	23	3232 Model Form of Subscription Agreement
30	24	3234B or 3235 Model Form of Certificate of Incorporation
31	25	3237 or 3237B Model Form of Occupancy Agreement
32	26	3245 Model Form of Bylaws
33	27	3259 Surety Bond Against Defects

< >
DocumentTypeList\_082021
Retired Document Types
+

### 3.2 Shortcut: Pending Records

**Number of Files Pending** - Upon clicking the icon, the pending uploads Records page is presented, providing the User the ability to view the Records that are still pending to be uploaded because of missing information. Upon correcting or providing the missing information, the user can then upload the files.



**Office Of Multifamily Housing Records Management System**  
Powered By TransAccess (PSL)

HOME ADMIN DROPBOX **PENDING UPLOADS** RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT
MFHD

PPT Any Records found in Pending Uploads did not successfully upload.  
 Review the information & try again.

Show 50 entries

Search:

Update all
Delete all

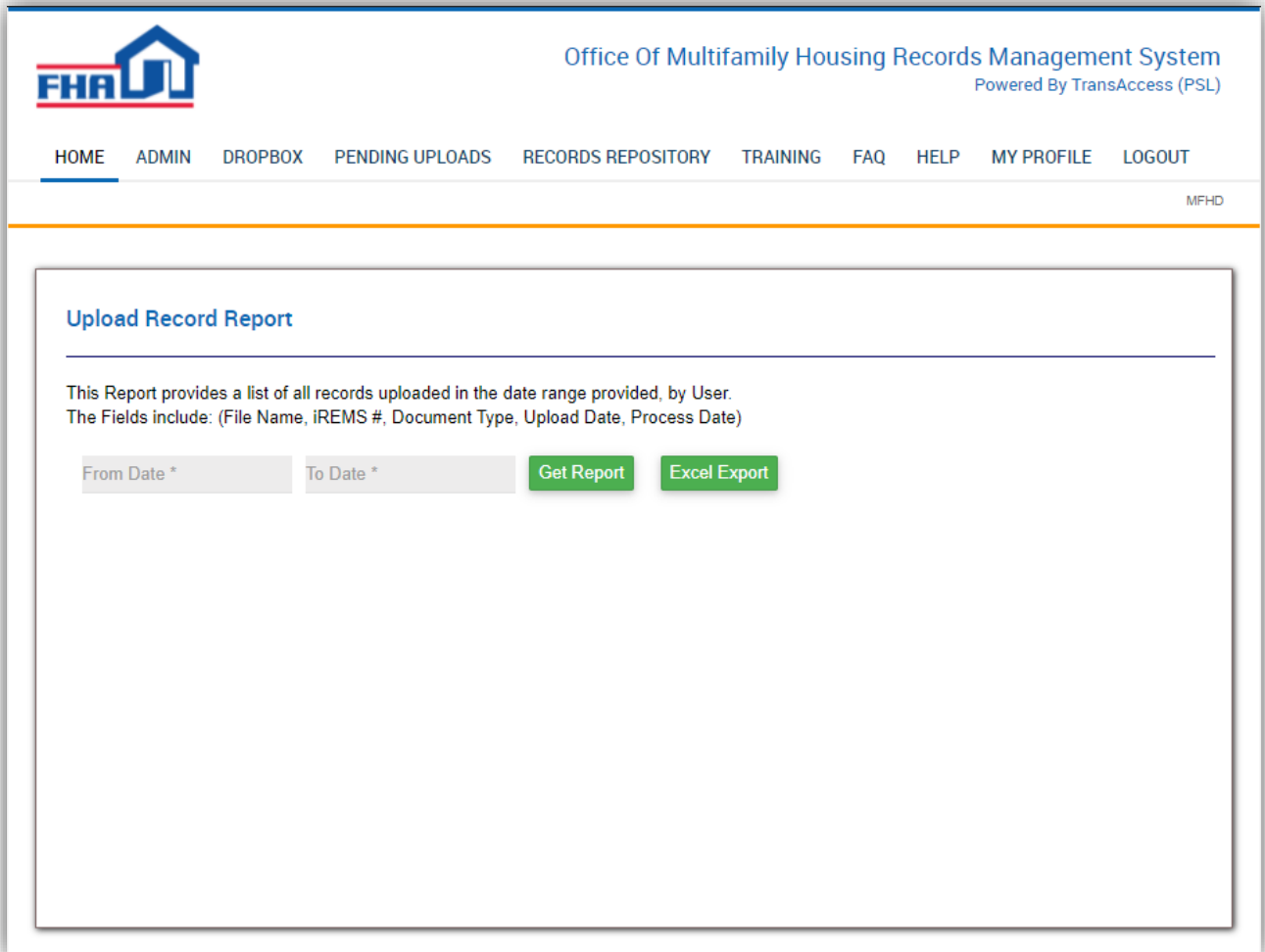
	File Name	Size	IREMS #	Document Type	Status	Delete	Actions
	800000021_214 Transfer Approvals (3).pdf	39KB	<input style="width: 100px;" type="text" value="800000321"/>	Select Docum ▼	Pending		<span style="background-color: #28a745; color: white; padding: 5px 10px; border-radius: 3px;">Update</span>
	800000021_Closing Attendance List (7).pdf	37KB	<input style="width: 100px;" type="text" value="800000689"/>	Select Docum ▼	Pending		<span style="background-color: #28a745; color: white; padding: 5px 10px; border-radius: 3px;">Update</span>
	800000021_214-Transfer-Approvals (4).pdf	37KB	<input style="width: 100px;" type="text" value="800000445"/>	Select Docum ▼	Pending		<span style="background-color: #28a745; color: white; padding: 5px 10px; border-radius: 3px;">Update</span>
	800000021_Closing Attendance List (8).pdf	37KB	<input style="width: 100px;" type="text" value="800000489"/>	Select Docum ▼	Pending		<span style="background-color: #28a745; color: white; padding: 5px 10px; border-radius: 3px;">Update</span>
	800000021_Closing Attendance List (6).pdf	37KB	<input style="width: 100px;" type="text" value="800000665"/>	Select Docum ▼	Pending		<span style="background-color: #28a745; color: white; padding: 5px 10px; border-radius: 3px;">Update</span>


Showing 1 to 5 of 5 entries

First
Previous
1
Next
Last

### 3.3 Shortcut: Upload Records Report

Upon clicking the icon, the ‘Upload Records report’ page is presented, providing the User the ability to select a date range and get a report of all the Records that have been uploaded by that user. It also has the facility to download the report in an excel format.





Office Of Multifamily Housing Records Management System  
Powered By TransAccess (PSL)

[HOME](#)
[ADMIN](#)
[DROPBOX](#)
[PENDING UPLOADS](#)
[RECORDS REPOSITORY](#)
[TRAINING](#)
[FAQ](#)
[HELP](#)
[MY PROFILE](#)
[LOGOUT](#)

MFHD

#### Upload Record Report


---

This Report provides a list of all records uploaded in the date range provided, by User.  
The Fields include: (File Name, iREMS #, Document Type, Upload Date, Process Date)



### 3.4 Shortcut: Errant Record Removal

Upon clicking the icon, the Errant Record Removal Help-Page is presented. This provides the User the ability to populate & submit the form for a problematic Record to be reviewed and removed.




Office Of Multifamily Housing Records Management System  
Powered By TransAccess (PSL)

[HOME](#)
[ADMIN](#)
[DROPBOX](#)
[PENDING UPLOADS](#)
[RECORDS REPOSITORY](#)
[TRAINING](#)
[FAQ](#)
[HELP](#)
[MY PROFILE](#)
[LOGOUT](#)

General/Technical Support

Errant Record Removal Assistance

### Need Assistance Removing Errant Records ?

Property	8*****	<a href="#">Version History</a> <hr/> View Version No.      0 
Document Type	1199A Direct Deposit	
Document Status	Active	

If you notice a mistake after uploading and need the Record removed, don't worry.. Just provide us with the necessary information below and your request will be reviewed at the end of the Week.

**\*The Details link will provide the required information.\***

Once you confirm all your information is correct, submit this form and you will receive a group automated follow-up email for your Manager to confirm the removal is necessary.

IREMS/Property Number \*


Document Type: \*

Select Type of Search

Version Number: \*

Managers Email: \*

Brief Description of Problem: \*

[Demonstration](#)  


Submit

Reset

### 3.5 Menu Options

The menu bar option was designed to allow system navigation function with ease. The menu options and sub-menu tasks have been defined by the flow and the use of the application. Based on the user's defined role, only those menu options are presented, which are applicable to the logged in User. Below illustrates the menu option, and its associated sub-menu tasks along with its definition and its assigned role(s).

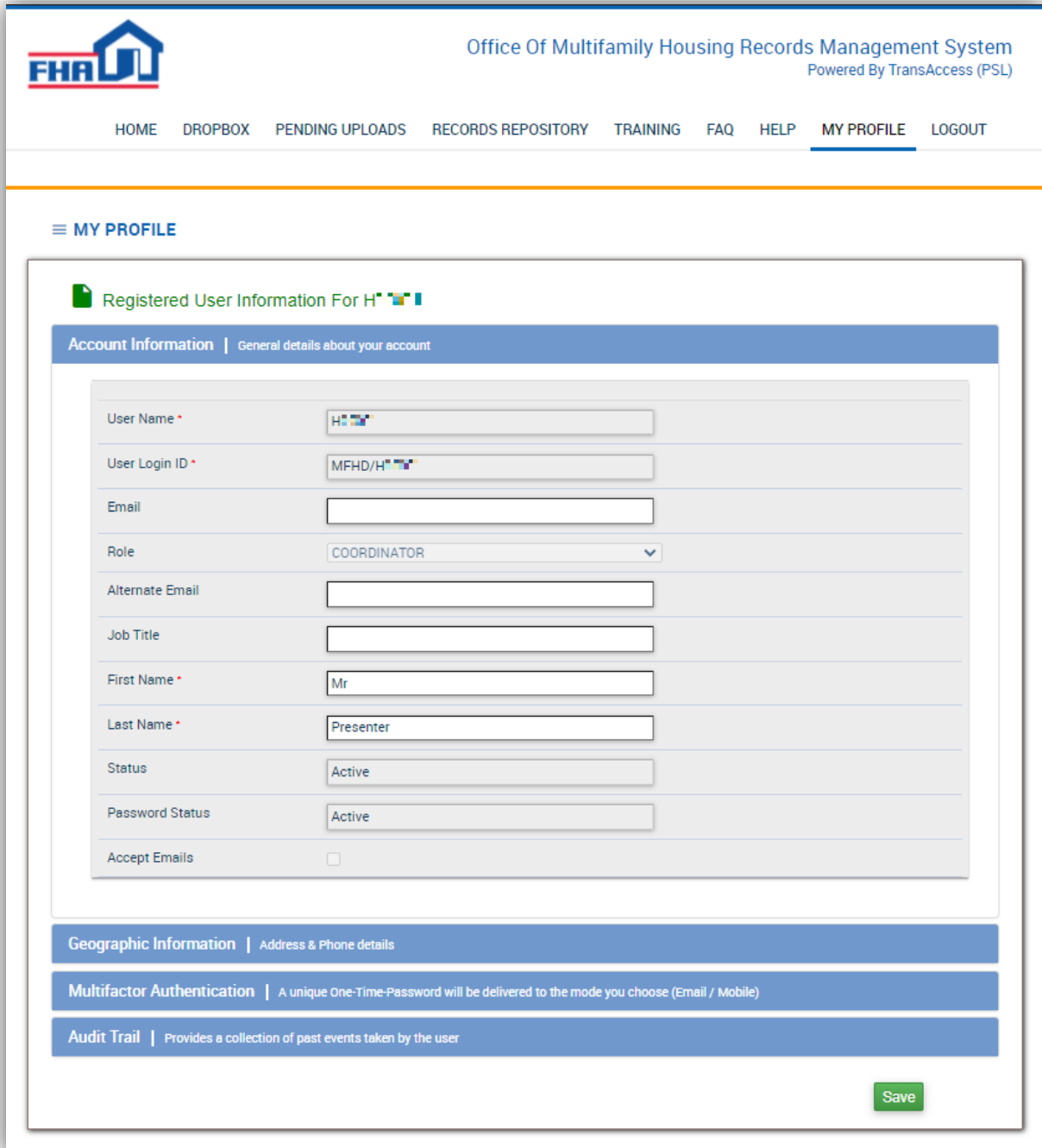
Menu Option	Sub Menu Task	Definition	Role
Home	None	Provides navigational shortcuts	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
My Profile	None	The personal profile page of the authenticated user	
Admin	User Management & Access Control	Presents a list of options to manage users and their permissions	<ul style="list-style-type: none"> <li>▪ Administrator</li> </ul>
	Configuration	System configuration page allows flexibility to how TransAccess presents information and how it is used	
	User Creation	Allows the Administrator to initiate the New User Registration process	
Dropbox	None	Presents a location to drag & drop files that are needed to be uploaded. The user can also choose for the files to be uploaded from the file browser option. Once selected all are listed below to perform necessary operations.	<ul style="list-style-type: none"> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
Pending Uploads	None	Presents the list of all files selected for upload and are waiting for some missing information or corrections needed to complete the upload process.	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
Records Repository	Search by IREMS#	Presents the ability to search for all Records associated with a particular IREMS#	<ul style="list-style-type: none"> <li>▪ Manager</li> <li>▪ Administrator</li> </ul>
	Full Text Search in all IREMS Records	Presents the ability to search for a specific keyword or test in all IREMS Records	
	Full Text Search limited to IREMS#	Presents the ability to search for keywords/text for a particular IREMS number	
	IREMS Records Search	Presents the ability to search for all the Records associated with IREMS	

<b>Training</b>	Helpful Document(s)	Presents the MFHD User Manual for download.	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
	Helpful Video(s)	Presents a list of training videos specific to using TransAccess RMS	
<b>Help</b>	General/Technical Support	Presents with the information on whom to contact in case of any help needed	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
	Errant Record Removal Assistance	This tool was added to make it easier for Users to request a document be removed from the current record	
<b>My Profile</b>	Account Information	Presents with the information of the users account details	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>
	Geographic Information	Presents with the information of the user's geographic location details	
	Multifactor Authentication	Allows the user to choose their preferred OTP [Mail, Mobile]	
	Audit Trail	Presents with the information of the user's activity in the system	
<b>Logout</b>	None	Allows the user to logout of the TransAccess Records Management system	<ul style="list-style-type: none"> <li>▪ Consumer</li> <li>▪ Coordinator</li> <li>▪ Administrator</li> </ul>

## 4 MY PROFILE

Each TransAccess Records Management User has a personal User Profile that was created during the registration process. If the System Administrator initiated the registration, the information provided is limited only to the required information, thus requiring the profile owner to update his/her profile to expand upon the information presented.

### 4.1 Updating 'My Profile'





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**MY PROFILE**


**Registered User Information For H\***

**Account Information** | General details about your account

User Name *	H*
User Login ID *	MFHD/H*
Email	
Role	COORDINATOR
Alternate Email	
Job Title	
First Name *	Mr
Last Name *	Presenter
Status	Active
Password Status	Active
Accept Emails	<input type="checkbox"/>

**Geographic Information** | Address & Phone details

**Multifactor Authentication** | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

**Audit Trail** | Provides a collection of past events taken by the user

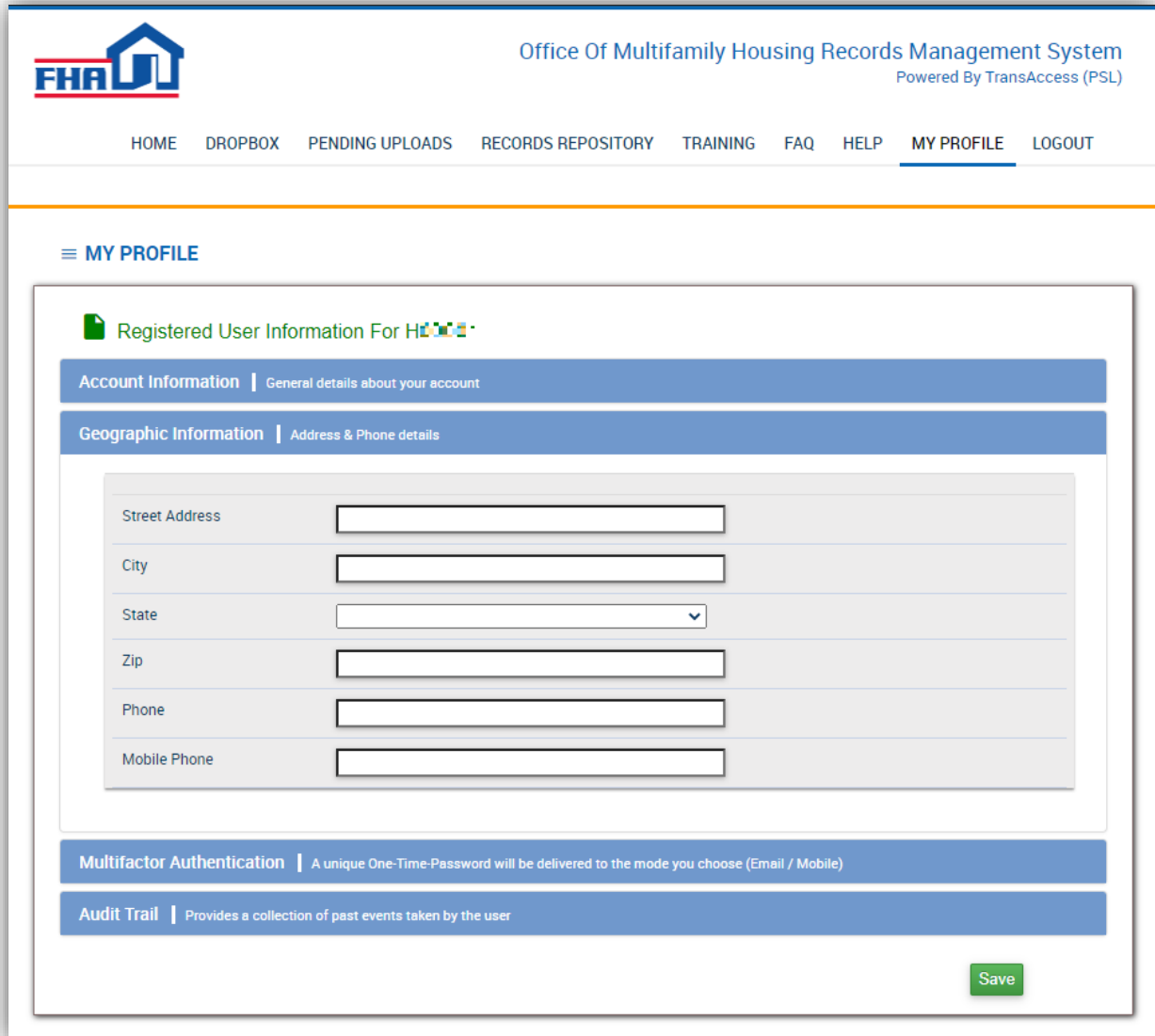
Save

### 4.1.1 Account Information

The 'Account Information' section consists of pertinent registration information pertaining to the authenticated user. Fields denoted with an asterisk (\*) are required upon registration initiated by either the user or System Administrator. The 'Account Information' fields are defined as follow:

Account Information	Description
<b>User Name *</b>	The 'H' or 'C' number assigned to HUD personnel (not editable).
<b>User Login ID *</b>	The authenticated user's Login ID.
<b>Email *</b>	HUD's internal email address. Used for email distribution executing from within TransAccess RM.
<b>Role</b>	The System Administrator upon activating the account assigns the authenticated user's role. The role determines TransAccess RM access level. See defined roles below. The option is NOT selectable to non-System Administrators.
<b>Alternate Email</b>	An alternative email address used by the user.
<b>Job Title</b>	HUD's job definition determines how the user defines his/her Job Title.
<b>First Name *</b>	The authenticated user's first name.
<b>Last Name *</b>	The authenticated user's last name.
<b>Status</b>	The authenticated user's login status
<b>Password Status</b>	TransAccess RM 'Active' Password Status indicates the user's password is functioning.
<b>Accept Email *</b>	The authenticated users' preference to accept email.


## 4.1.2 Geographic Information



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HOME DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP **MY PROFILE** LOGOUT

≡ MY PROFILE

 Registered User Information For HUD

**Account Information** | General details about your account

**Geographic Information** | Address & Phone details

Street Address

City

State

Zip

Phone

Mobile Phone

**Multifactor Authentication** | A unique One-Time-Passsword will be delivered to the mode you choose (Email / Mobile)

**Audit Trail** | Provides a collection of past events taken by the user

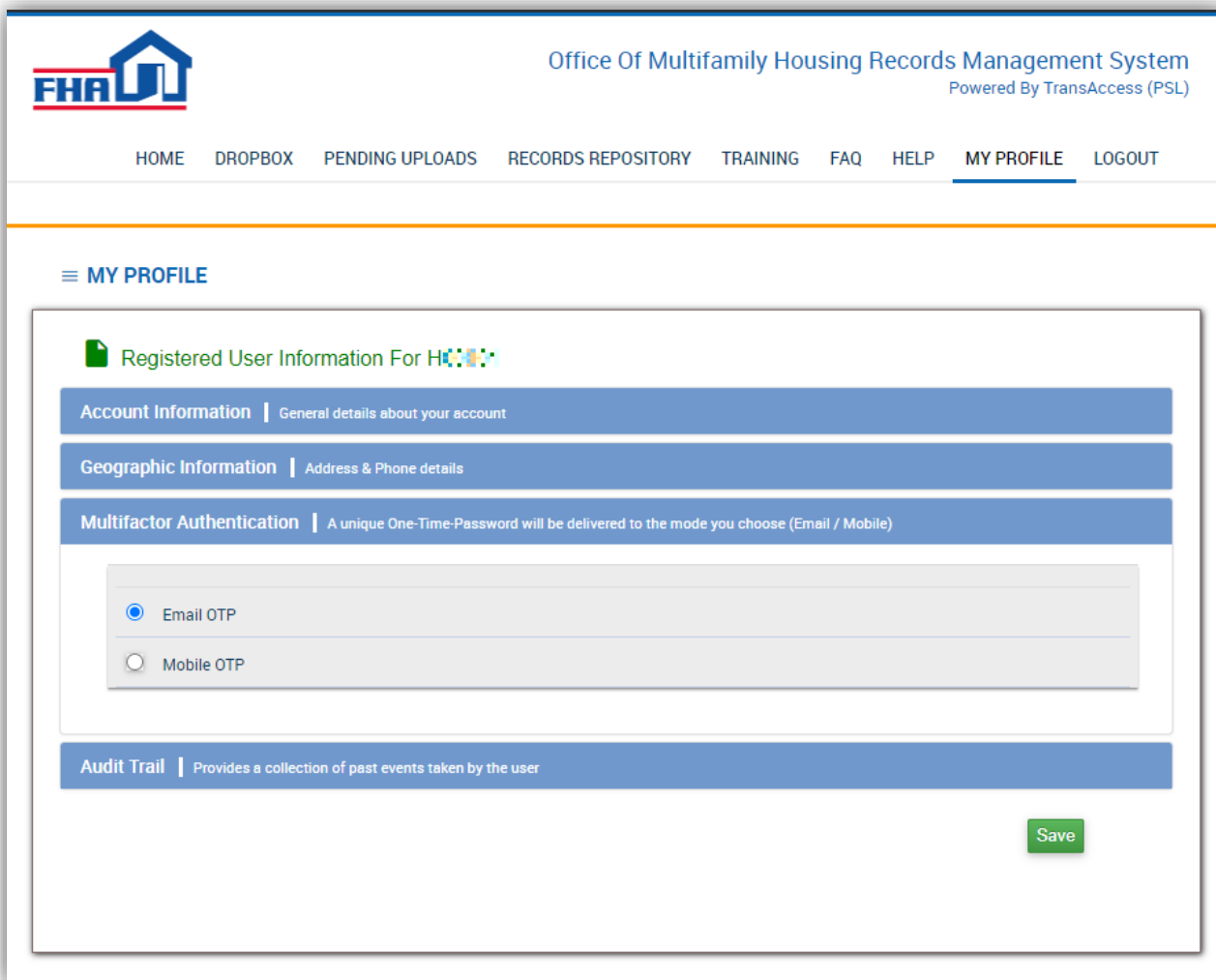
**Save**

The ‘Geographic Information’ section consists of secondary information pertaining to the authenticated user’s location and means of contact. These fields are optional. The ‘Geographic Information’ fields are defined as follow:

Geographic Information	Description
<b>Street Address</b>	The Street Address of the HUD office in which the authenticated user is employed.
<b>Street Address 2</b>	Street Address line 2 of the HUD office in which the authenticated user is employed.
<b>City</b>	The City associated to authenticated user’s location.
<b>State</b>	The State associated to authenticated user’s location, which is selected from within a dropdown list.

<b>ZIP</b>	The ZIP Code associated to the authenticated user's location.
<b>Phone</b>	The Office Phone Number of the authenticated user.
<b>Mobile Phone</b>	The Mobile Phone Number of the authenticated user. (Used for Mobile Multifactor Authentication)


### 4.1.3 Multifactor Authentication



**FHA** Office Of Multifamily Housing Records Management System  
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HOME DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

≡ MY PROFILE

 Registered User Information For H

**Account Information** | General details about your account

**Geographic Information** | Address & Phone details

**Multifactor Authentication** | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

☒ Email OTP

☐ Mobile OTP

**Audit Trail** | Provides a collection of past events taken by the user

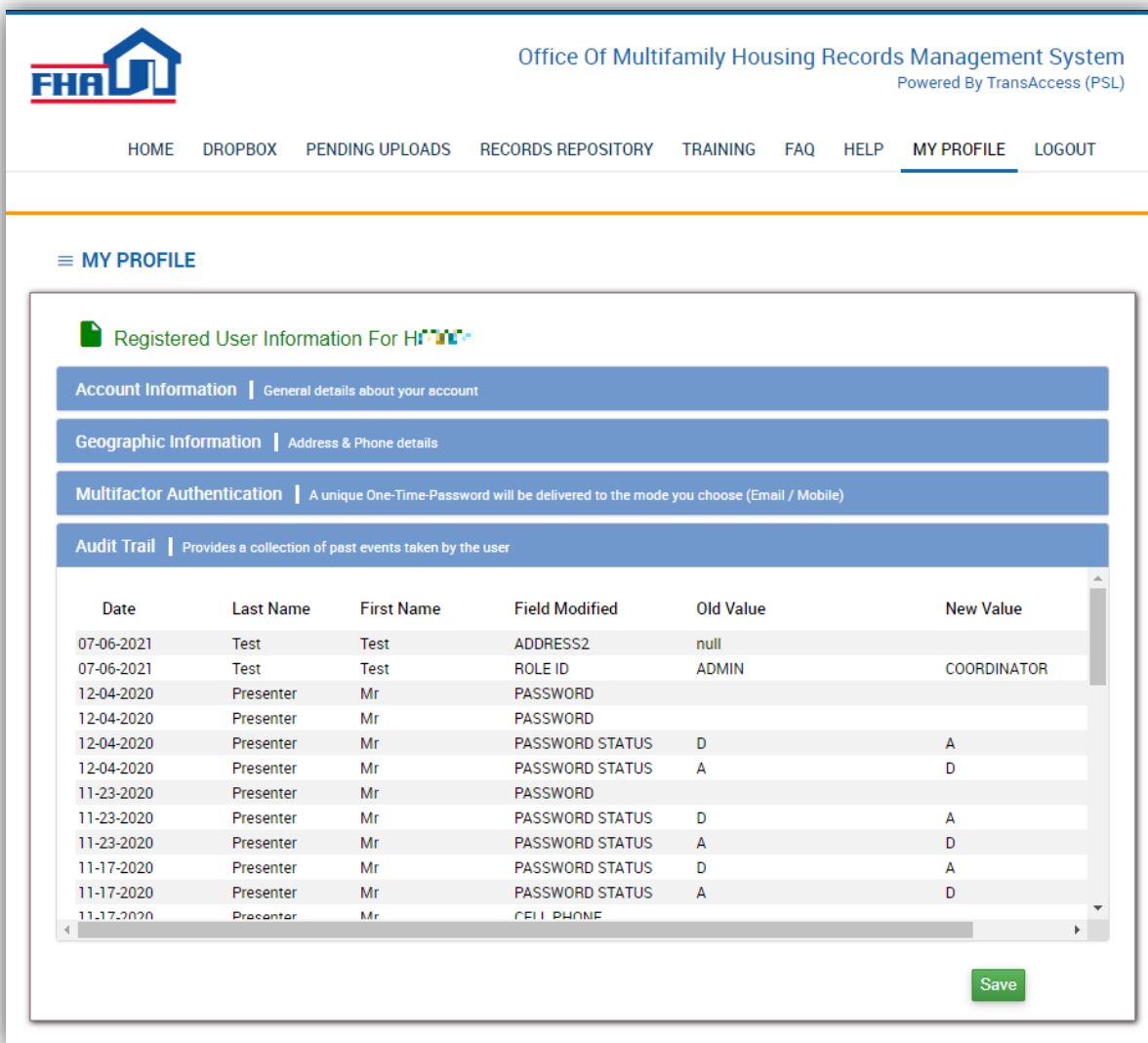
Save

The 'Multifactor Authentication' section consists of pertinent information pertaining to the authenticated User's Sign in preferences. Email OTP is chosen by default, but if Mobile OTP is requested the user will have to manually update that in this section. The 'Multifactor Authentication' fields are defined as follow:

Geographic Information	Description
Email OTP	A mode for how the User can receive their One-Time-Password during Sign In. (Default)
Mobile OTP	Another mode for how the User can receive their One-Time-Password during Sign In

#### 4.1.4 Audit Trail


The My Profile 'Audit Trail' is a Log that records any event that is saved within the My Profile tab. The event will include the: Date of The Change, Name of The User Making Change, The Field Modified, & Change that Occurred.



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HOME DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP **MY PROFILE** LOGOUT

≡ MY PROFILE

 Registered User Information For H...

**Account Information** | General details about your account

**Geographic Information** | Address & Phone details

**Multifactor Authentication** | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

**Audit Trail** | Provides a collection of past events taken by the user

Date	Last Name	First Name	Field Modified	Old Value	New Value
07-06-2021	Test	Test	ADDRESS2	null	
07-06-2021	Test	Test	ROLE ID	ADMIN	COORDINATOR
12-04-2020	Presenter	Mr	PASSWORD		
12-04-2020	Presenter	Mr	PASSWORD		
12-04-2020	Presenter	Mr	PASSWORD STATUS	D	A
12-04-2020	Presenter	Mr	PASSWORD STATUS	A	D
11-23-2020	Presenter	Mr	PASSWORD		
11-23-2020	Presenter	Mr	PASSWORD STATUS	D	A
11-23-2020	Presenter	Mr	PASSWORD STATUS	A	D
11-17-2020	Presenter	Mr	PASSWORD STATUS	D	A
11-17-2020	Presenter	Mr	PASSWORD STATUS	A	D
11-17-2020	Presenter	Mr	CELL PHONE		

**Save**

**To update 'My Profile' information, follow the steps below:**

*Paper copies of this document may not be current and should only be used for reference, unless the revision is validated.*



**STEPS:**

**Step 1.** Click the 'My Profile' menu option to access the 'My Profile' page.

**Step 2.** The 'My Profile' fields are populated with the minimum required information entered by the System Administrator; however, information can be updated by positioning the cursor in the editable fields.

**Step 3.** Click the 'Save' push button to save changes.

**Note:** Fields with a red asterisk (\*) presented next to it are required.

## 5 ADMINISTRATIVE FUNCTIONS

The Administrative menu option is visible only to the System Administrators. The option provides the System Administrator the ability to manage new Users, and to configure the application as desired.

### 5.1 New User Creation


The System Administrator can access the New User Creation page several ways for added flexibility: (1) By selecting the 'User Creation' link from within the Admin page, and (2) by selecting the User Management & Access control and selecting one of the user from the list.

#### 5.1.1 New User Registration (Administrator Initiated)

To gain access to TransAccess RM, registration must occur, which is initiated by a non-registered User or by a designated System Administrator. In this section, we will focus on the New User Registration process initiated by the System Administrator.

**Note:** The System Administrator has the ability to initiate the registration process; however, the user's account is not activated until the User completes the registration process.

## Blank New User Registration Page



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[LOGOUT](#)

MFHD

Account Information | General details about your account

\* Required

User Name \*

User Login ID

Email \*

Role \*

ADMIN

COORDINATOR

CONSUMER

Alternate Email

Job Title

First Name \*

Last Name \*

Accept Emails

☐

Geographic Information | Address & Phone details

Street Address

ZIP

Phone

City

Mobile Phone

State

Multifactor Authentication | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

☒ Enable Email OTP

☐ Enable Mobile OTP

Save

Cancel

### STEPS:

**Step 1.** From the Admin menu option, select the User Creation option.

**Step 2.** Enter at minimum, information in fields indicated by an asterisk (\*).

**Step 3.** Click the ‘Save’ push button.

**Result:** After the Administrator submits the “New User Registration” request; an email is forwarded to the new user to alert him/her of the request. The user must complete the New User Registration request by inputting the remaining required fields information within 4 days to activate the account.

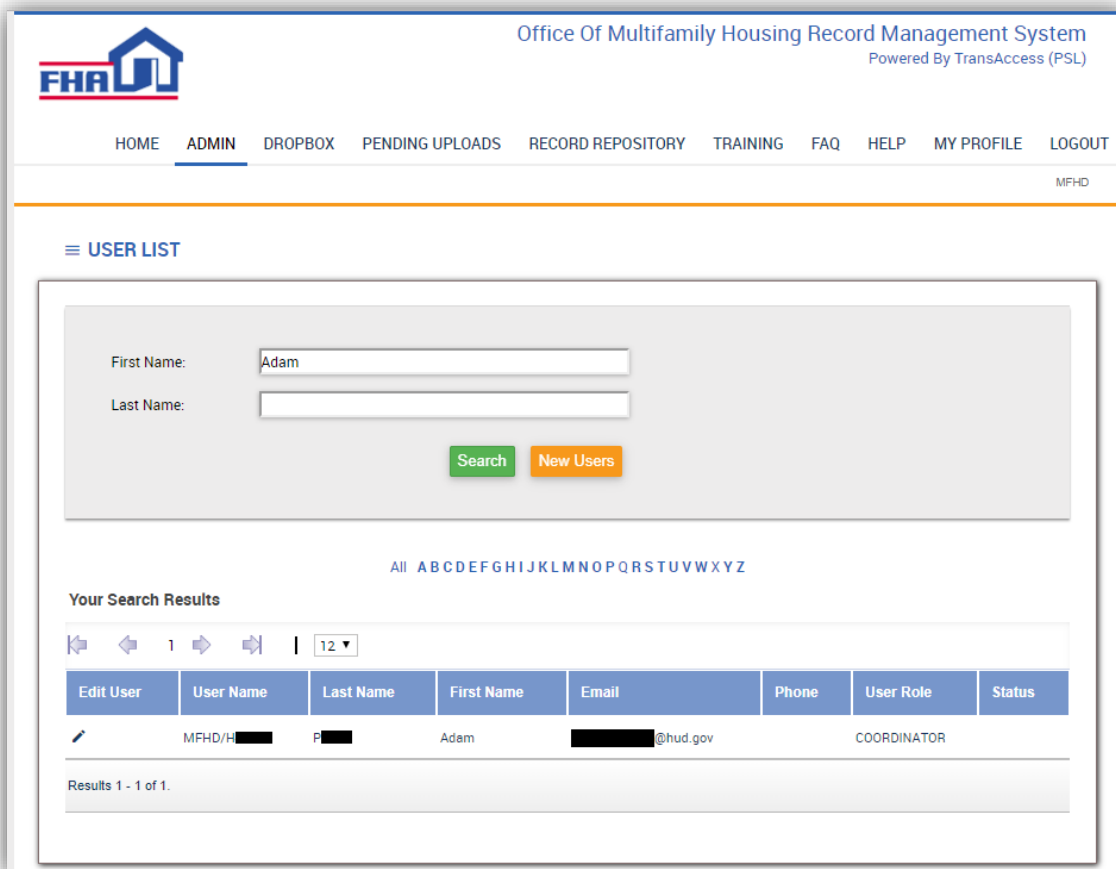
## 5.2 User Management and Access Control

This section allows to manage & configure access to users, by a designated System Administrator. In this section, we will focus on the New User Registration process initiated by the System Administrator and to modify the details of existing users

### 5.2.1 Search for a registered user

The System Administrator has the ability to search for a registered user by entering the first name and last name of any registered user and by clicking the search button.

#### User Search Page



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HOME ADMIN DROPBOX PENDING UPLOADS RECORD REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

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≡ USER LIST

First Name: Adam

Last Name:

Search New Users

All ABCDEFGHIJKLMNOPQRSTUVWXYZ

Your Search Results

1 12

Edit User	User Name	Last Name	First Name	Email	Phone	User Role	Status
	MFHD/H [redacted]	P [redacted]	Adam	[redacted]@hud.gov		COORDINATOR	

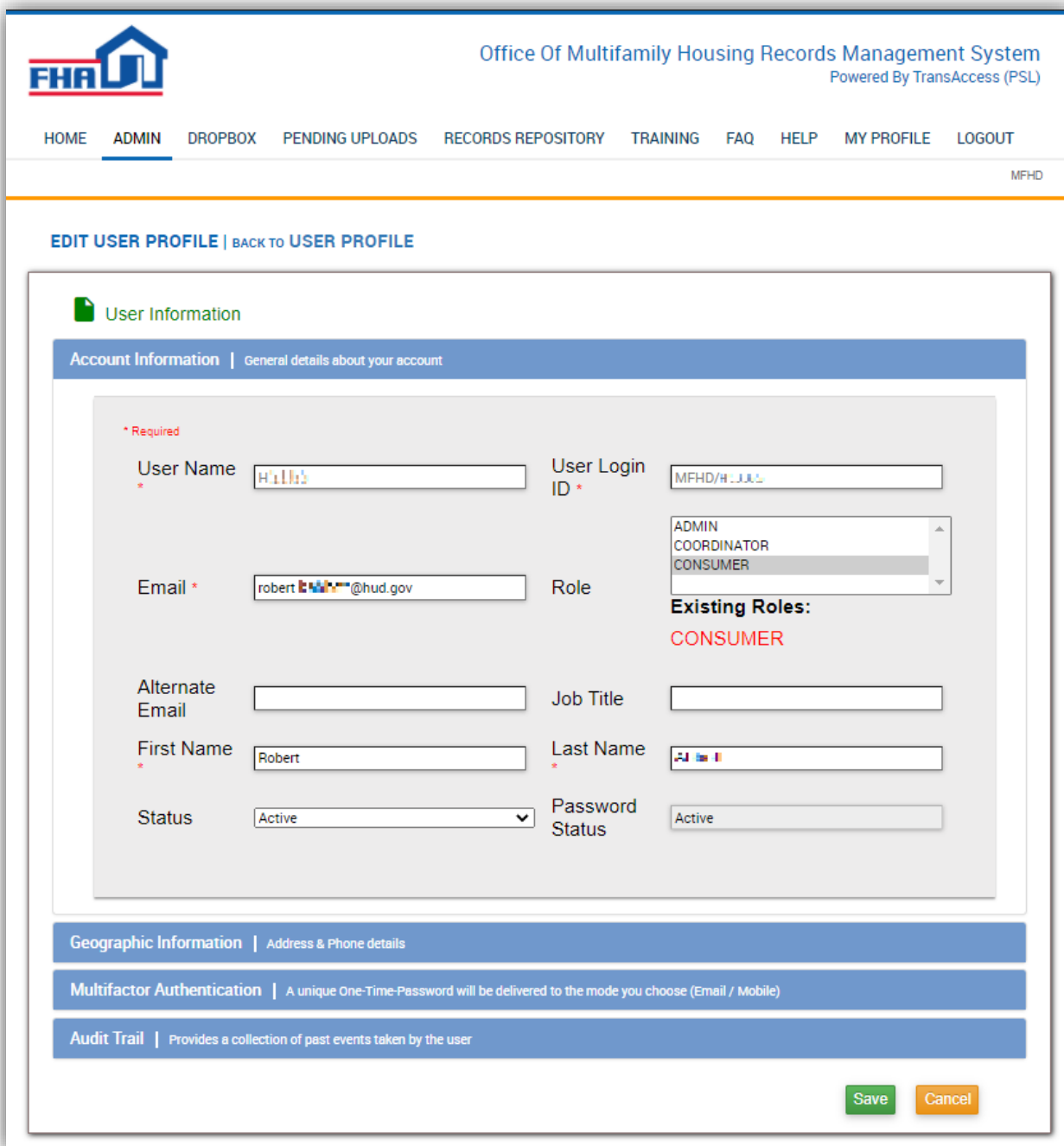
Results 1 - 1 of 1.

### 5.2.1.1 Editing the details of registered users

The System Administrator has the ability to search for a registered user and to edit the user's information in this page by clicking the pen icon in the table against the user.

#### User Selection for editing

After selection the user information is displayed:



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HOME ADMIN DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

MFHD

**EDIT USER PROFILE** | [BACK TO USER PROFILE](#)

**User Information**

**Account Information** | General details about your account

**\* Required**

User Name  User Login ID

Email  Role

Existing Roles:  
CONSUMER

Alternate Email  Job Title

First Name  Last Name

Status  Password Status

**Geographic Information** | Address & Phone details

**Multifactor Authentication** | A unique One-Time-Password will be delivered to the mode you choose (Email / Mobile)

**Audit Trail** | Provides a collection of past events taken by the user

**Save** **Cancel**

The system admin will be able to modify all editable fields. The username field cannot be changed or edited.

### 5.2.2 Creating new users

The system administrator can create new users from this page by clicking on the New Users button and then follow the steps provided under [Section #1 above](#).

## 6 DROPBOX

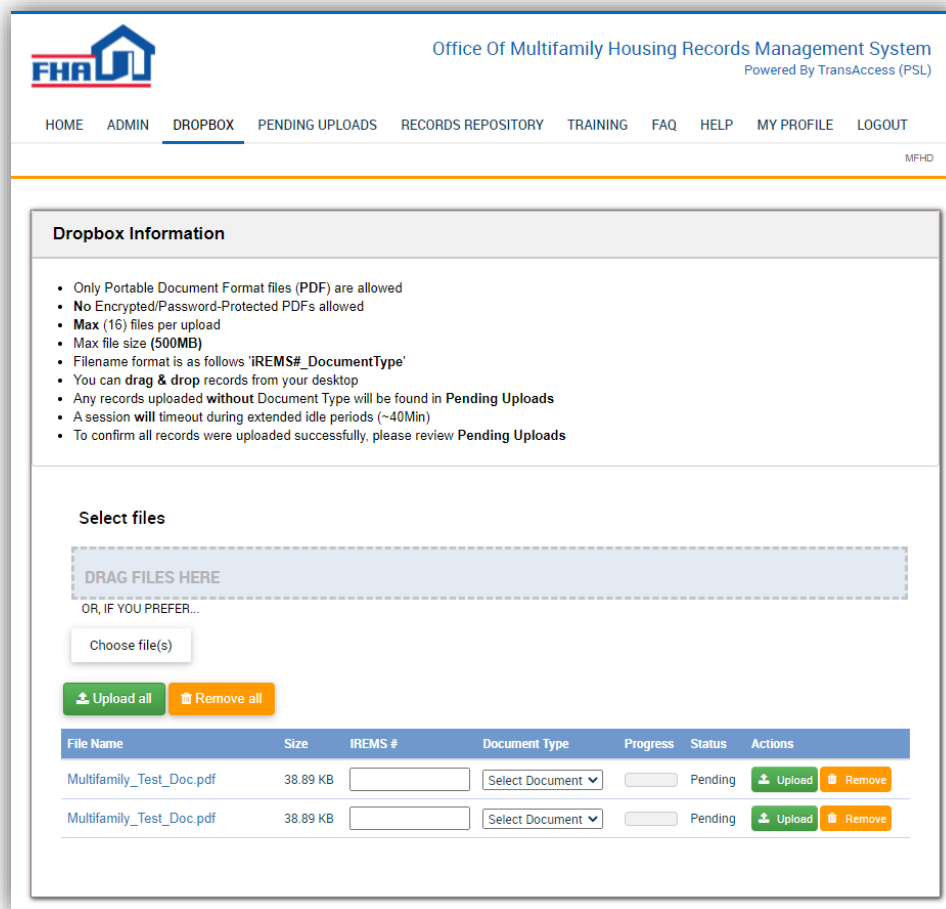
Dropbox page is where a user can upload the required Records and associate them to a specific category within TransAccess Records Management. It is the beginning step of the workflow process for tracking Records.

### 6.1 File Selection

In order to upload files into the TransAccess RMS we have the ability to select one or multiple files either by clicking the Choose Files button or by Dragging & Dropping files into the designation greyed out area.

#### 6.1.1 Choose Files

The 'Choose Files' button gives you the option to either select one or multiple files for the user list allows Users to either scan or manually key Items into TransAccess Records Management.



**Dropbox Information**

- Only Portable Document Format files (PDF) are allowed
- No Encrypted/Password-Protected PDFs allowed
- Max (16) files per upload
- Max file size (500MB)
- Filename format is as follows 'IREMS#\_DocumentType'
- You can **drag & drop** records from your desktop
- Any records uploaded **without** Document Type will be found in **Pending Uploads**
- A session **will** timeout during extended idle periods (~40Min)
- To confirm all records were uploaded successfully, please review **Pending Uploads**

**Select files**

DRAG FILES HERE

OR, IF YOU PREFER...

Choose file(s)

Upload all Remove all

File Name	Size	IREMS #	Document Type	Progress	Status	Actions
Multifamily_Test_Doc.pdf	38.89 KB		Select Document		Pending	Upload Remove
Multifamily_Test_Doc.pdf	38.89 KB		Select Document		Pending	Upload Remove

#### STEPS:

**Step 1.** Click on choose files button

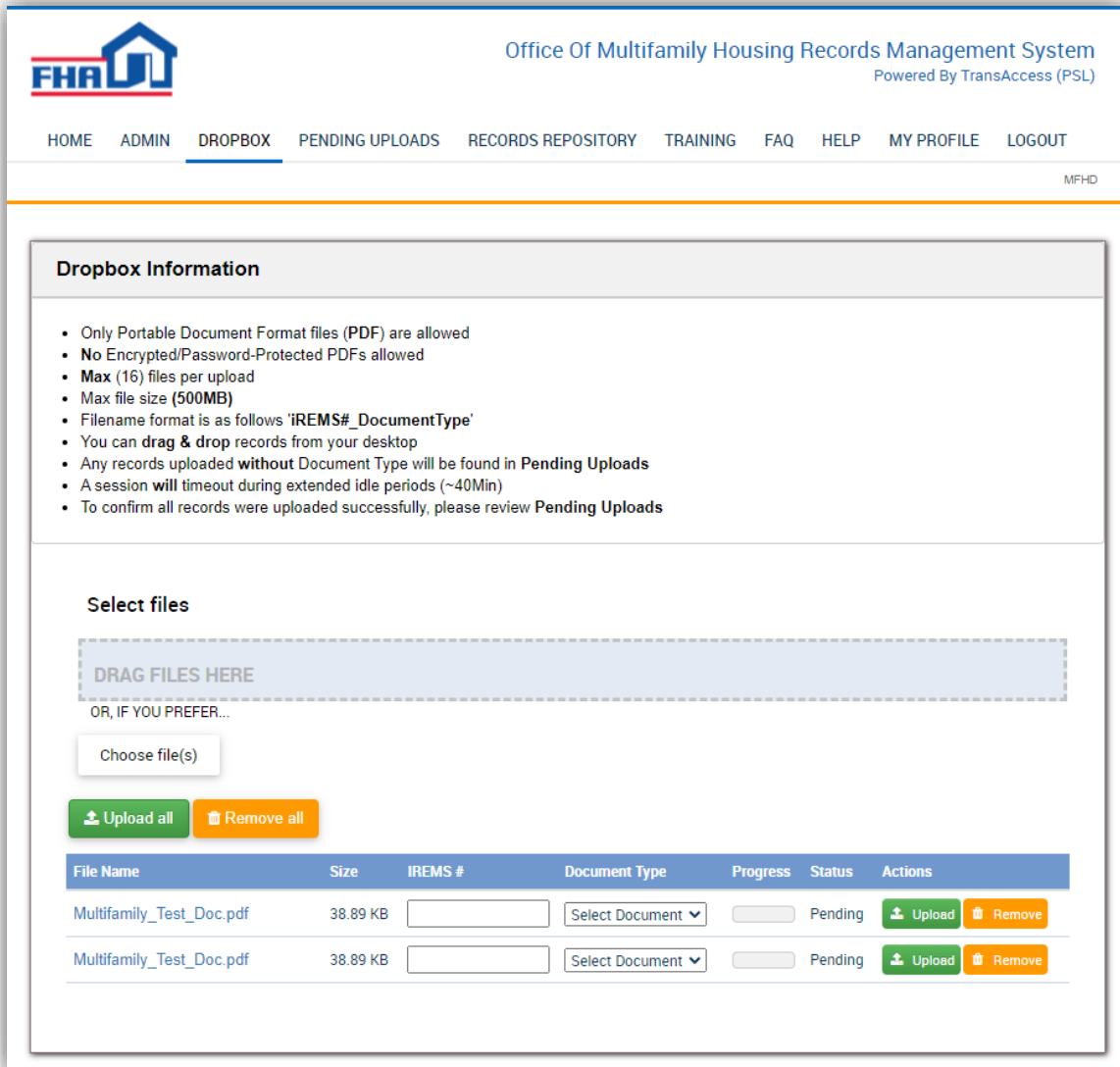
**Note.** Only PDF files are allowed to be selected & uploaded.

**Step 2.** After providing all the required information click on either Upload/Upload all/ Remove or Remove all button.

**Result.** Based on the option either the files will be uploaded or will be moved to pending upload if the provided information is incorrect.

## 6.2 Required Information

After selecting the file for upload the user has to provide the required information choosing the correct Records type and the IREMS number that the Records needs to be associated with.



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HOME ADMIN **DROPBOX** PENDING UPLOADS RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

MFHD

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**Dropbox Information**

- Only Portable Document Format files (PDF) are allowed
- No Encrypted/Password-Protected PDFs allowed
- Max (16) files per upload
- Max file size (500MB)
- Filename format is as follows 'IREMS#\_DocumentType'
- You can **drag & drop** records from your desktop
- Any records uploaded **without** Document Type will be found in **Pending Uploads**
- A session **will** timeout during extended idle periods (~40Min)
- To confirm all records were uploaded successfully, please review **Pending Uploads**

**Select files**

DRAG FILES HERE

OR, IF YOU PREFER...

Choose file(s)

**Upload all** **Remove all**

File Name	Size	IREMS #	Document Type	Progress	Status	Actions
Multifamily_Test_Doc.pdf	38.89 KB	<input type="text"/>	Select Document ▼	<div></div>	Pending	<b>Upload</b> <b>Remove</b>
Multifamily_Test_Doc.pdf	38.89 KB	<input type="text"/>	Select Document ▼	<div></div>	Pending	<b>Upload</b> <b>Remove</b>

### STEPS:

**Step 1.** In the list of selected files, the user can update the IREMS number that these files are associated with

**Note.** The restrictions and instruction listed on this page are to be followed to successfully upload the files.

**Step 2.** The user can either click on upload or remove, by clicking upload the user can see that the file gets uploaded and the progress can be seen for individual files.



**Step 3.** If the upload is not successful, then the progress bar will display a red color bar and these files can be viewed under Pending Uploads section.

**Result.** Based on the option either the files will be uploaded or will be moved to pending upload if the provided information is incorrect.

## 7 PENDING UPLOADS

This section will display a list of files that are not upload due to missing or incomplete associated repository information. (pending to be uploaded).

If the user has not provided the required information, (i.e. Records type or the IREMS number) that the Record needs to be associated with at the time of uploading file @ Dropbox, the file is moved to Pending Uploads section, as shown below:

Dropbox Information

- Only Portable Document Format files (PDF) are allowed
- Max** (16) files per upload
- Max file size (500MB)
- Filename format is as follows 'IREMS#\_DocumentType'
- You can **drag & drop** records from your desktop
- Any records uploaded **without** IREMS # OR Document Type will be found in **Pending Uploads**
- A session **will** timeout during extended idle periods (~20Min)
- To confirm all records were uploaded successfully, please review **Pending Uploads**

Select files

DRAG FILES HERE


OR, IF YOU PREFER...

Choose file(s)

Name	Size	IREMS	Doc Type	Progress	Status	Actions
Multifamily_Test_Doc.pdf	33.97 KB		Select Document		Pending	<div>Upload</div> <div>Remove</div>

All files that were not uploaded will be visible in a table format, with all available details. The uploaded File name, Size of the file missing or incorrect values in IREM / Doc Type

User can choose to (1) update the information and complete upload or (2) delete the file.



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HOME ADMIN DROPBOX **PENDING UPLOADS** RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

**PPT** Any Records found in Pending Uploads did not successfully upload.  
Review the information & try again.

Show  entries

Search:


Update all Delete all

	File Name	Size	IREMS #	Document Type	Status	Delete	Actions
	800000021_214 Transfer Approvals (3).pdf	39KB	<input type="text" value="800000321"/>	Select Docum	Pending		Update
	800000021_Closing Attendance List (7).pdf	37KB	<input type="text" value="800000689"/>	Select Docum	Pending		Update
	800000021_214-Transfer-Approvals (4).pdf	37KB	<input type="text" value="800000445"/>	Select Docum	Pending		Update
	800000021_Closing Attendance List (8).pdf	37KB	<input type="text" value="800000489"/>	Select Docum	Pending		Update
	800000021_Closing Attendance List (6).pdf	37KB	<input type="text" value="800000665"/>	Select Docum	Pending		Update

Showing 1 to 5 of 5 entries

First Previous **1** Next Last

To complete the upload, the user needs to update the IREMS number and select the associated Records type for file to be associated with. Once the appropriate information is provided, the files are uploaded successfully.



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HOME ADMIN DROPBOX **PENDING UPLOADS** RECORDS REPOSITORY TRAINING FAQ HELP MY PROFILE LOGOUT

**PPT** Any Records found in Pending Uploads did not successfully upload.  
Review the information & try again.

Show  entries

Search:

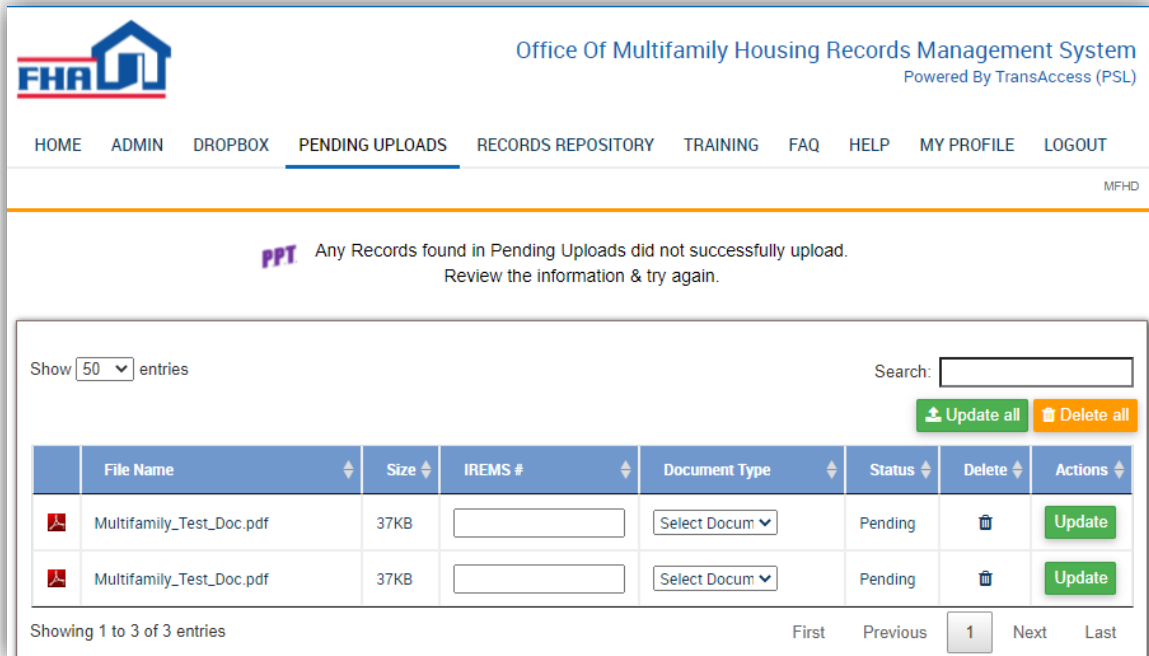
Update all Delete all

	File Name	Size	IREMS #	Document Type	Status	Delete	Actions
	Multifamily_Test_Doc.pdf	37KB	<input type="text" value="800004445"/>	1199A Direct	Pending		Update
	Multifamily_Test_Doc.pdf	37KB	<input type="text"/>	Select Docum	Pending		Update
	Multifamily_Test_Doc.pdf	37KB	<input type="text"/>	Select Docum	Pending		Update

Showing 1 to 3 of 3 entries

First Previous **1** Next Last

Once the File is uploaded successfully, the item is removed from queue and the queue is cleared.



The screenshot shows the 'Office Of Multifamily Housing Records Management System' interface, powered by TransAccess (PSL). The navigation bar includes links for HOME, ADMIN, DROPBOX, PENDING UPLOADS (selected), RECORDS REPOSITORY, TRAINING, FAQ, HELP, MY PROFILE, and LOGOUT. A message indicates that any records found in Pending Uploads did not successfully upload and should be reviewed. Below this, a table displays pending uploads with columns for File Name, Size, IREMS #, Document Type, Status, Delete, and Actions. Two entries for 'Multifamily\_Test\_Doc.pdf' (37KB) are shown, both with a status of 'Pending'. Each entry has a 'Delete' icon and an 'Update' button. The interface also includes a search bar, 'Update all' and 'Delete all' buttons, and pagination controls showing 'Showing 1 to 3 of 3 entries'.

File Name	Size	IREMS #	Document Type	Status	Delete	Actions
Multifamily_Test_Doc.pdf	37KB		Select Docum ▼	Pending		Update
Multifamily_Test_Doc.pdf	37KB		Select Docum ▼	Pending		Update

### STEPS:

**Step 1.** Enter valid IREM number that the file is to associated with in column 4 “IREM”

**Step 2.** Select Records Type from dropdown, to associate the uploaded file to in column 5 “Doc Type”

**Step 3.** Click on update to complete the upload. User can see that the file gets uploaded, and the progress can be seen for individual files.

## 8 RECORDS REPOSITORY

This section provides the user the ability to Search for a File or Records by Text name, file reference number (IREM #), and also helps locate specific text across multiple files / Records. Users can search, download and view the results.

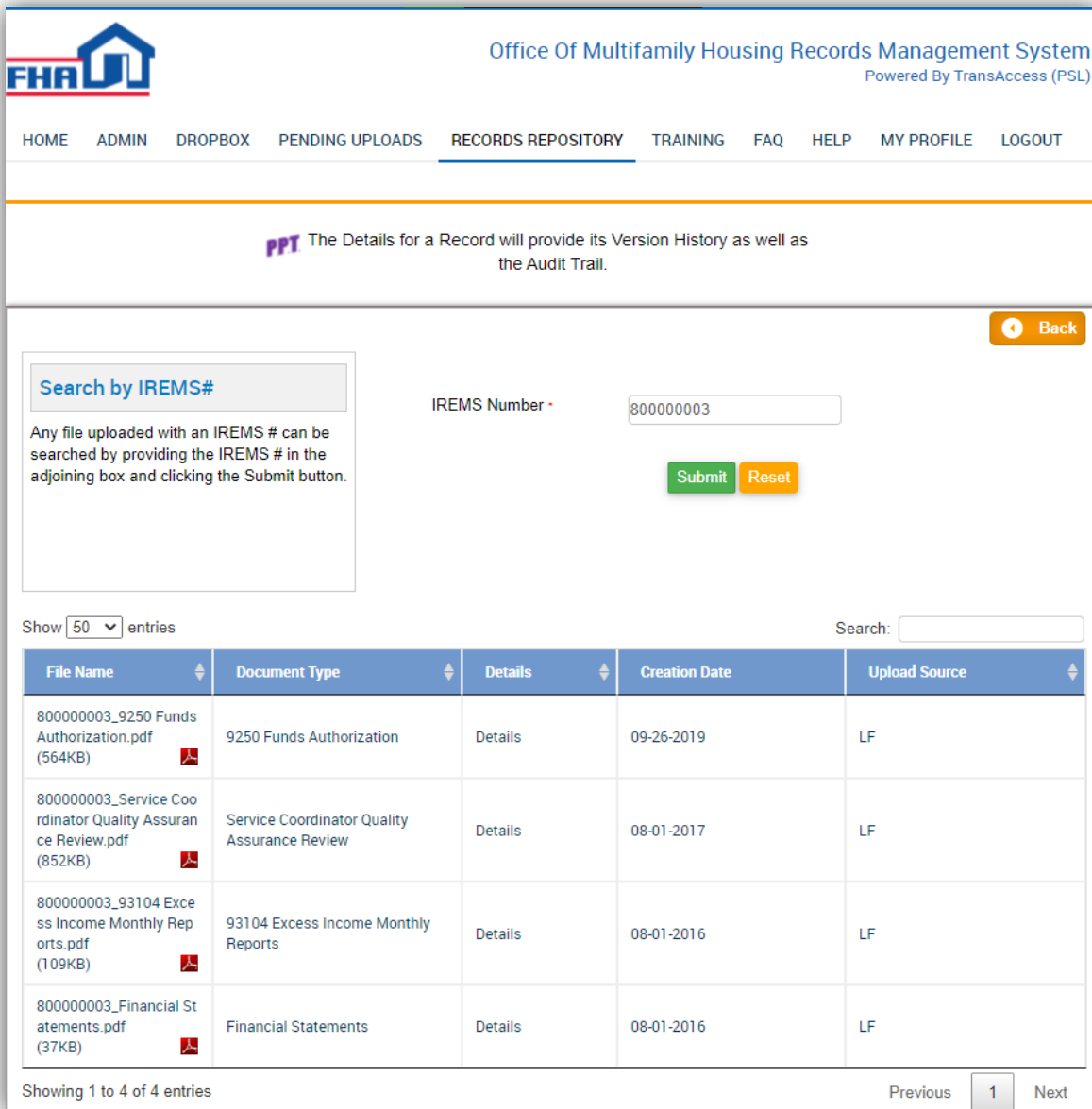
**This section covers the following types of search:**

- Search by IREMS#
- Full Text Search in all IREMS Records
- Full Text Search limited to IREMS#
- IREMS Records Search



## 8.1 Search by IREMS#

Users may use this option to search for an uploaded file from the repository by IREMS number.



The screenshot shows the 'Office Of Multifamily Housing Records Management System' interface, powered by TransAccess (PSL). The navigation bar includes links for HOME, ADMIN, DROPBOX, PENDING UPLOADS, RECORDS REPOSITORY (selected), TRAINING, FAQ, HELP, MY PROFILE, and LOGOUT. A message states: 'PPT The Details for a Record will provide its Version History as well as the Audit Trail.' Below this, there is a 'Back' button. The main search area is titled 'Search by IREMS#' and includes a text box for 'IREMS Number' with the value '800000003'. Below the text box are 'Submit' and 'Reset' buttons. A note states: 'Any file uploaded with an IREMS # can be searched by providing the IREMS # in the adjoining box and clicking the Submit button.' Below the search area, there is a 'Show 50 entries' dropdown and a 'Search:' input field. A table displays the search results with columns: File Name, Document Type, Details, Creation Date, and Upload Source. The table contains four entries. At the bottom, it says 'Showing 1 to 4 of 4 entries' and has 'Previous', '1', and 'Next' navigation buttons.

File Name	Document Type	Details	Creation Date	Upload Source
800000003_9250 Funds Authorization.pdf (564KB)	9250 Funds Authorization	Details	09-26-2019	LF
800000003_Service Coordinator Quality Assurance Review.pdf (852KB)	Service Coordinator Quality Assurance Review	Details	08-01-2017	LF
800000003_93104 Excess Income Monthly Reports.pdf (109KB)	93104 Excess Income Monthly Reports	Details	08-01-2016	LF
800000003_Financial Statements.pdf (37KB)	Financial Statements	Details	08-01-2016	LF

### Steps:

**Step 1 :** Click the hyper link for **Search by IREMS #**

**Step 2 :** Enter valid IREMS number (9 digit numeric value) and click Submit

**Note:** The list of all file associated with the IREMS number will be populated in table view

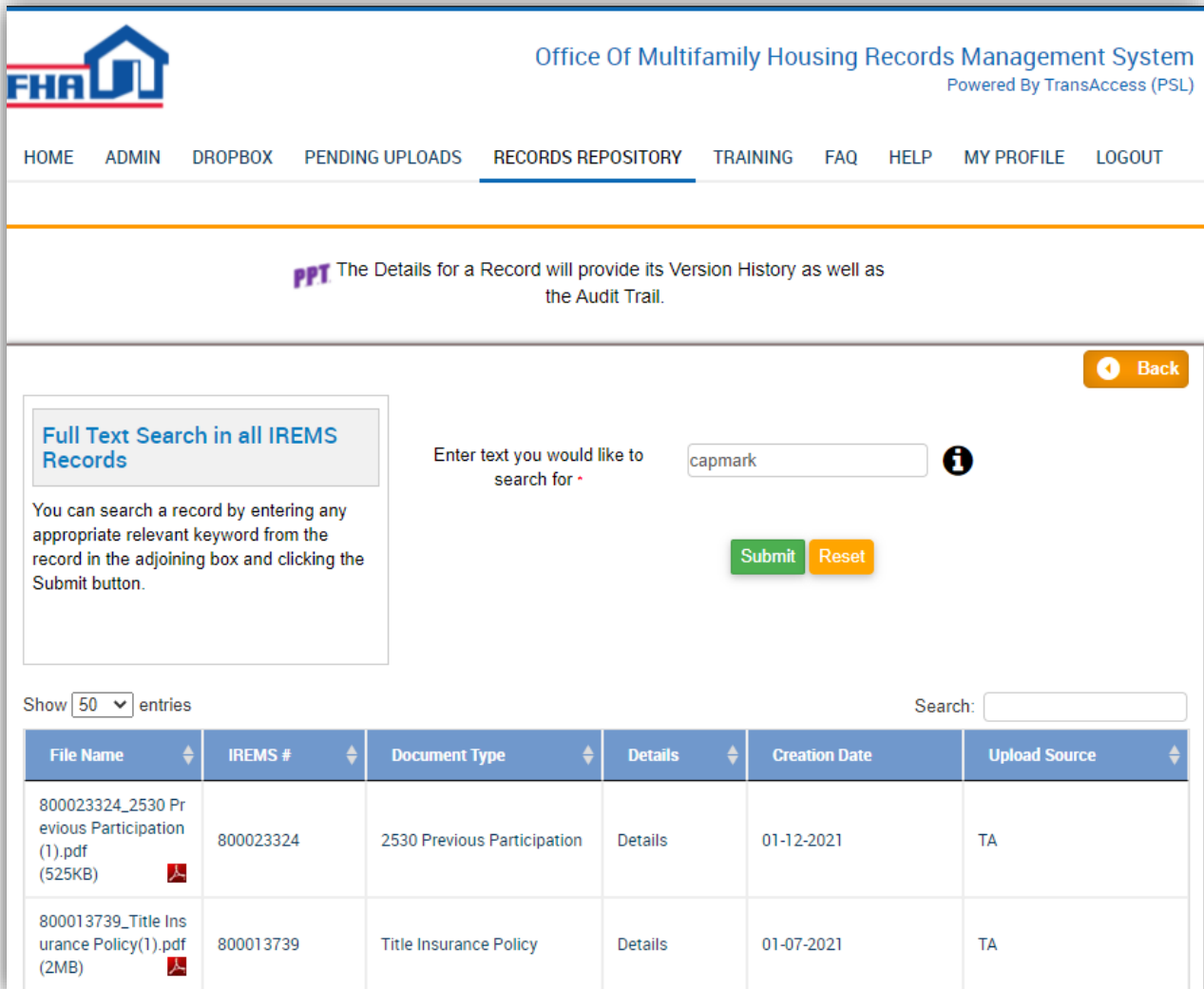
**Step 3:** Click on required filename to download and view details. The pdf file will open in new window

**Step 4 :** Reset value and search for another IREMS as required. Only 1 IREMS can be searched at a time.

## 8.2 Full Text Search in all IREMS Records

In this section is for Keyword search. User can enter a keyword in search window, and the list of all Records with matching keyword in the Records repository will be populated.

**Note:** This will be exhaustive since it will populate all Records that match the keyword searched from the repository



The screenshot shows the 'Office Of Multifamily Housing Records Management System' interface. The top navigation bar includes links for HOME, ADMIN, DROPBOX, PENDING UPLOADS, RECORDS REPOSITORY (highlighted), TRAINING, FAQ, HELP, MY PROFILE, and LOGOUT. Below the navigation bar, a message states: 'PPT The Details for a Record will provide its Version History as well as the Audit Trail.' The main content area features a 'Full Text Search in all IREMS Records' section. This section includes a text input field with the placeholder 'Enter text you would like to search for' and a 'capmark' button. Below the input field are 'Submit' and 'Reset' buttons. To the right of the input field is an information icon. A 'Back' button is located in the top right corner of the main content area. Below the search section, there is a 'Show 50 entries' dropdown and a 'Search:' input field. The search results are displayed in a table with the following columns: File Name, IREMS #, Document Type, Details, Creation Date, and Upload Source.

File Name	IREMS #	Document Type	Details	Creation Date	Upload Source
800023324_2530 Previous Participation (1).pdf (525KB)	800023324	2530 Previous Participation	Details	01-12-2021	TA
800013739_Title Insurance Policy(1).pdf (2MB)	800013739	Title Insurance Policy	Details	01-07-2021	TA

### Steps:

**Step 1 :** Click the hyper link for **Full Text Search in all IREMS Records**

**Step 2 :** Enter required Text in the search box and click Submit


**Note:** The list of all file with the searched Text will be populated in table view

**Step 3:** Click on required filename to download and view details. The pdf file will open in a new window

**Step 4 :** User can click reset and search for any other Text value as required.

### 8.3 Full Text Search Limited to IREMS#

This option can be used to search for keywords in specific IREMS file or folder. User should specify the key word they want to search and also mention the IREMS Records in which they want to search. Results will fetch the specific Records. User can download and view Records wherein the searched keyword would be highlighted in the entire Records wherever it appears.



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**PPT** The Details for a Record will provide its Version History as well as the Audit Trail.

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**Full Text Search limited to IREMS#**

You can search a record by providing the IREMS# and any appropriate relevant keyword from the record in the adjoining box and clicking the Submit button.

IREMS Number \*

Enter text you would like to search for \*  i

Submit
Reset

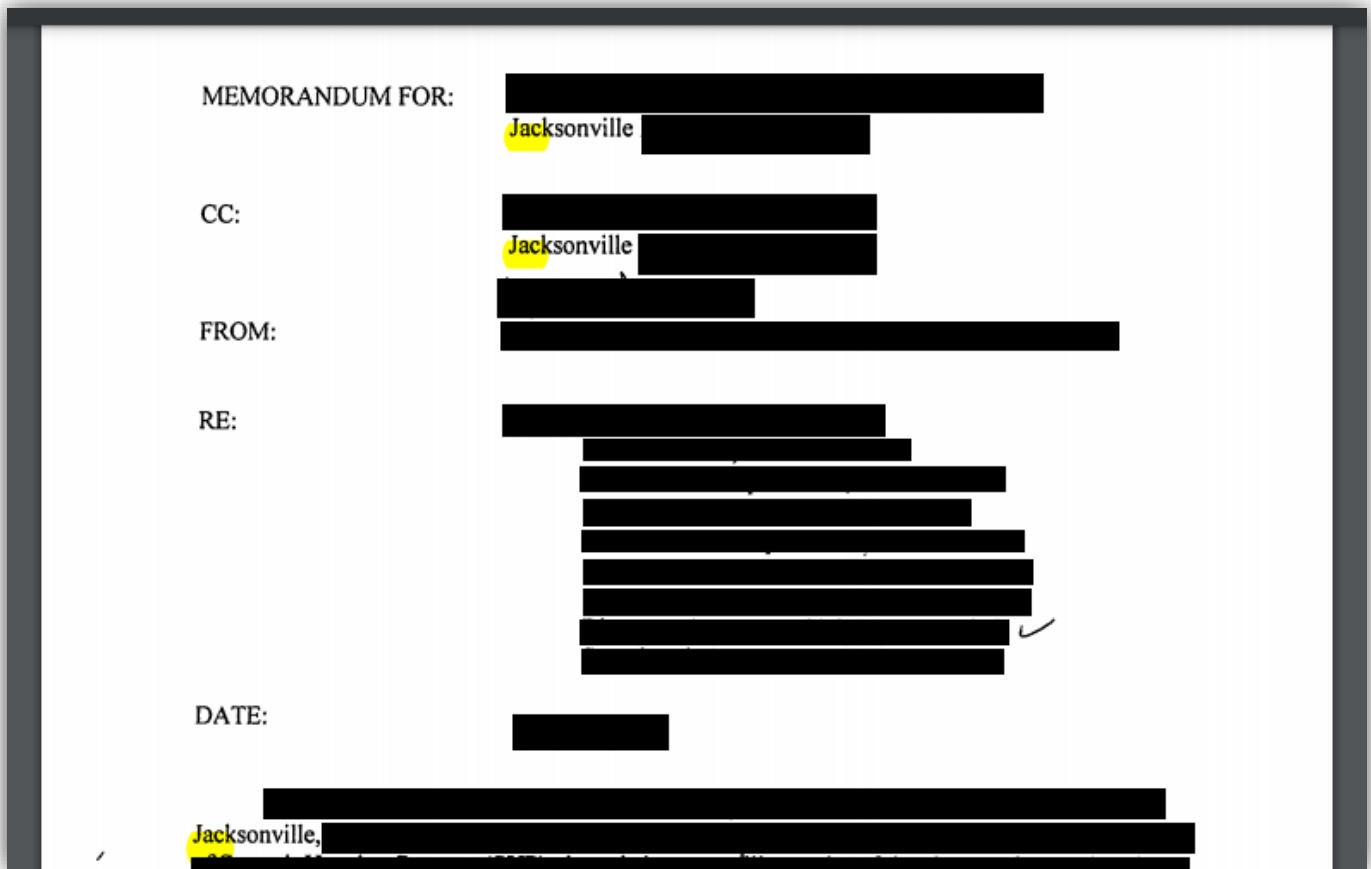
Show 50 entries Search:

File Name	Document Type	Details	Creation Date	Upload Source
800000065_Organizational Documents.pdf (1MB)	Organizational Documents	<a href="#">Details</a>	07-05-2015	LF

Showing 1 to 1 of 1 entries

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1
Next





**Steps :**

**Step 1.** Click on the hyperlink **“Full Text Search limited to IREMS#”**. The search page opens.

**Step 2.** Enter the IREMS number of the Records from which the keyword search is to be done.

**Step 3.** Enter the Keyword/search word and click **submit**

**Result.** The referred IREMS Records gets populated in a table view.

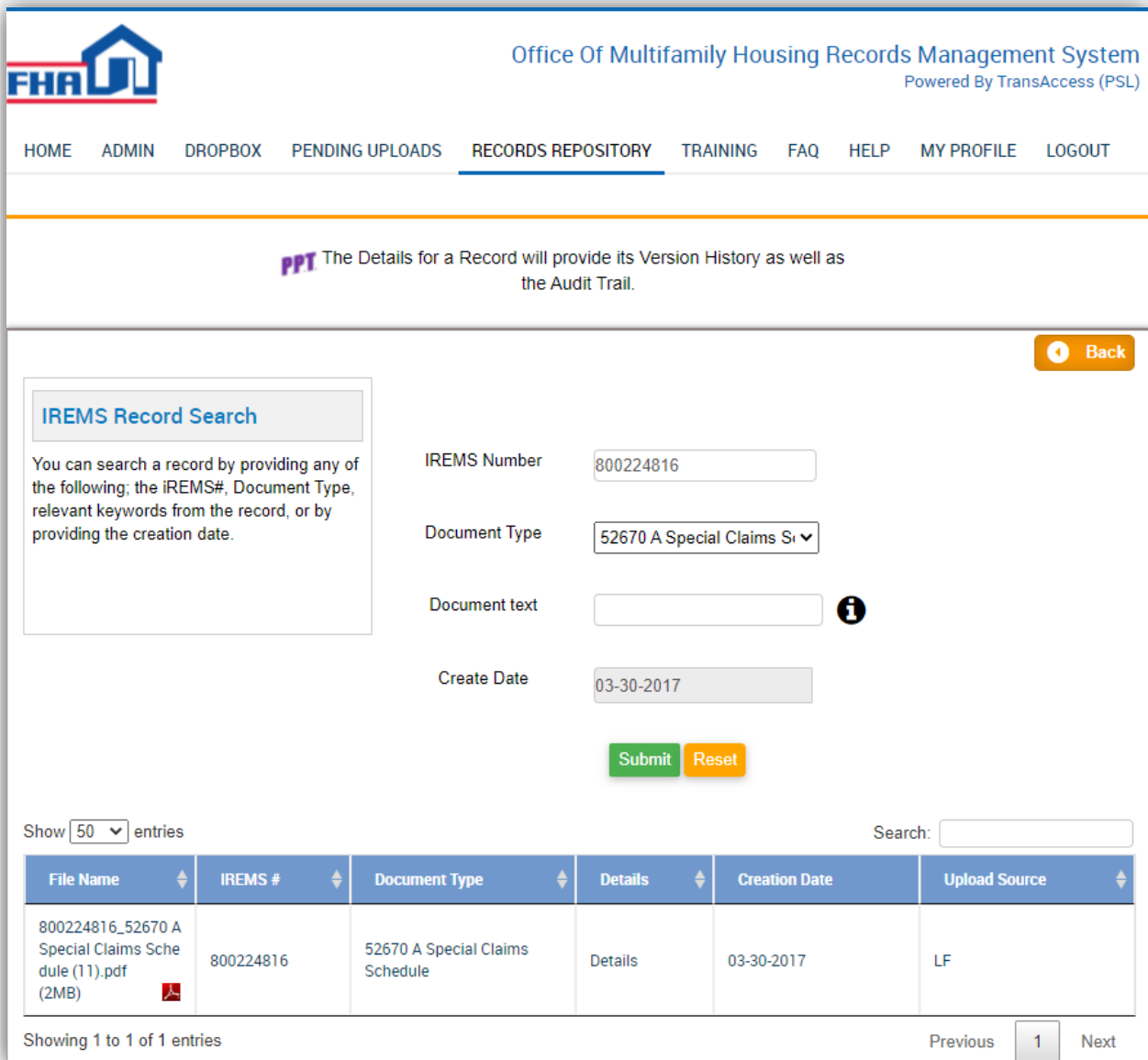
**Step 4.** Click to download and view the Records.

**Result.** The searched Keyword will be highlighted in the Records as shown in above image.

**Note.** If the searched Keyword is not available in the Records, the search will fetch null results.

## 8.4 IREMS Record Search

This is an advanced search option. User can provide additional details to filter down the search criteria to a specific file in the referred IREMS Records repository.



The screenshot shows the 'Office Of Multifamily Housing Records Management System' interface, powered by TransAccess (PSL). The navigation bar includes links for HOME, ADMIN, DROPBOX, PENDING UPLOADS, RECORDS REPOSITORY (selected), TRAINING, FAQ, HELP, MY PROFILE, and LOGOUT. A purple PPT icon and text state: 'The Details for a Record will provide its Version History as well as the Audit Trail.'

**IREMS Record Search**

You can search a record by providing any of the following; the IREMS#, Document Type, relevant keywords from the record, or by providing the creation date.

IREMS Number:

Document Type:

Document text:

Create Date:

Show  entries

Search:

File Name	IREMS #	Document Type	Details	Creation Date	Upload Source
800224816_52670 A Special Claims Schedule (11).pdf (2MB)	800224816	52670 A Special Claims Schedule	Details	03-30-2017	LF

Showing 1 to 1 of 1 entries

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### STEPS:

**Step 1.** Click the hyperlink for IREMS Records Search. The search page opens

**Step 2.** Enter IREMS Number to search from

**Step 3.** Select the corresponding Records Type (optional)

**Step 4.** Enter the Search Keyword / text to search for (optional)

**Step 5.** Enter the corresponding file creation date (optional)

**Step 6.** Click Submit

**Note :** This search option will successfully fetch results only when appropriate information is provided in the fields.

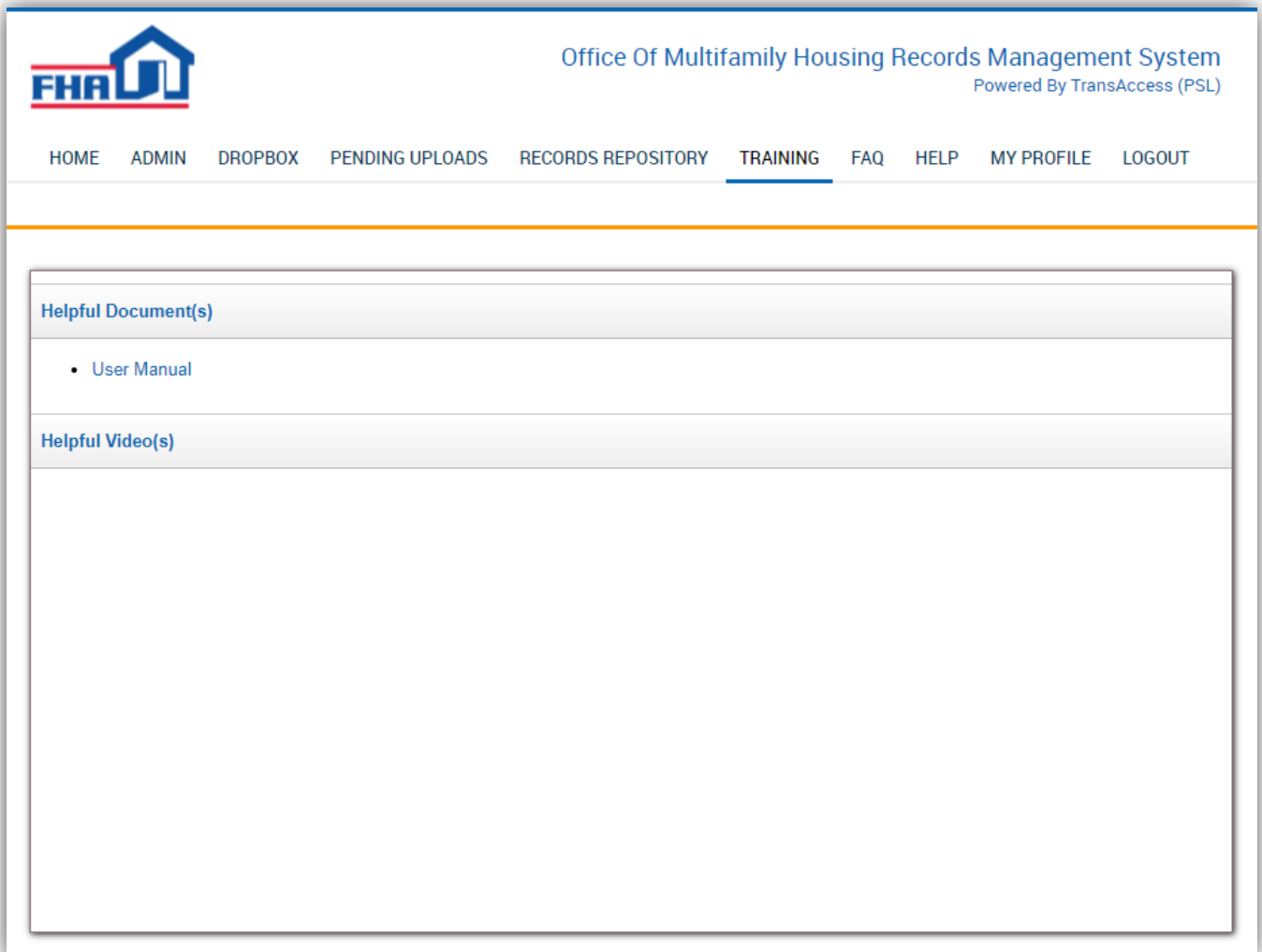
**Results.** The search result will be a precise Record – a more specific and much faster.

## 9 TRAINING

This section displays list of training material (videos & documents) that are upload and available on the system.

### 9.1 Helpful Documents


This section has link to downloadable version of the User Manual Guide (this manual) for the [Multifamily Housing Record Management System](#)



The screenshot shows the 'Office Of Multifamily Housing Records Management System' interface, powered by TransAccess (PSL). The navigation bar includes links for HOME, ADMIN, DROPBOX, PENDING UPLOADS, RECORDS REPOSITORY, TRAINING (which is the active page), FAQ, HELP, MY PROFILE, and LOGOUT. The main content area is titled 'Helpful Document(s)' and lists a single item: 'User Manual'. Below this, there is a section titled 'Helpful Video(s)' which is currently empty.

## 9.2 Helpful Video(s)

This section includes several demonstrational videos that help with navigating the system more efficiently.




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Helpful Document(s)

Helpful Video(s)




TRANSACCESS  
TRAINING

0:00 / 3:18

### Signing-On Using Multifactor Authentication

This tutorial video will walk users through the steps of signing into Multifamily TransAccess using Multifactor Authentication.



TRANSACCESS  
TRAINING

0:00 / 5:34

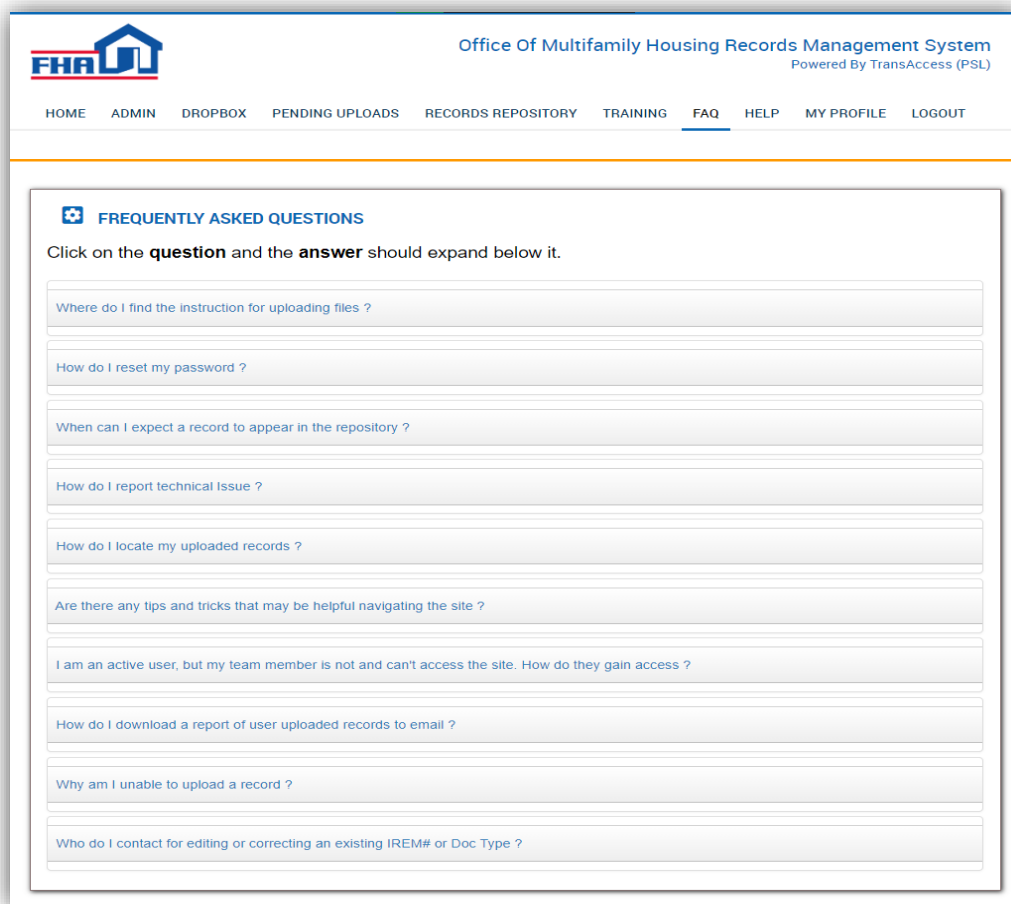
### Record Uploading Tutorial

This tutorial video will assist users by providing them with the basics for uploading records within TransAccess.

## 10 FAQ

This section will present answers for generally asked questions

(FAQ) Frequently Asked Questions allow Users the ability to click on the question and the answer will expand below it.



**FHA** Office Of Multifamily Housing Records Management System  
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HOME ADMIN DROPBOX PENDING UPLOADS RECORDS REPOSITORY TRAINING **FAQ** HELP MY PROFILE LOGOUT

**FREQUENTLY ASKED QUESTIONS**

Click on the **question** and the **answer** should expand below it.


- Where do I find the instruction for uploading files ?
- How do I reset my password ?
- When can I expect a record to appear in the repository ?
- How do I report technical issue ?
- How do I locate my uploaded records ?
- Are there any tips and tricks that may be helpful navigating the site ?
- I am an active user, but my team member is not and can't access the site. How do they gain access ?
- How do I download a report of user uploaded records to email ?
- Why am I unable to upload a record ?
- Who do I contact for editing or correcting an existing IREM# or Doc Type ?

## 11 HELP

This section will provide information to the user on whom to reach in case of any help required. The information will guide the user to reach the respective people or team to resolve a query.

### 11.1 General/Technical Support

This section is for Users who may be experiencing technical issues or have general questions about Multifamily TransAccess. Simply follow the directions provided, and our helpdesk will get you connected with the appropriate support.



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General/Technical Support

For password or new account assistance please visit the FAQ section of the portal.

If you have any general questions or need assistance with TransAccess please contact your local TransAccess Records Management (POC) Point of Contact.

If you are reporting a technical issue with TransAccess, please email [helpdesk@penielsolutions.com](mailto:helpdesk@penielsolutions.com) and cc: your local POC and Jeanne King.

Please follow the template provided below and attach a screenshot of the error itself.

**Header:**

- [To: [Helpdesk@PenielSolutions.com](mailto:Helpdesk@PenielSolutions.com)]
- [Cc: (Your Supervisor's Email), [Jeanne.M.King@Hud.gov](mailto:Jeanne.M.King@Hud.gov)]
- [Subject: (Include Brief description of the problem)]
- [Include Supporting Document (Attachment/Screenshot)]

**Body:**


- [Your Name, First & Last]
- [User Name, MFHD/Hxxxxx]
- [Phone Number, (xxx) xxx-xxxx]
- [Supervisor's Name, First & Last]
- [Detailed description of the problem being reported]

Your questions & concerns will be answered in a timely manner. Here at PSL we count on your cooperation and feedback to assure your daily routine runs as smooth as possible. We look forward to working with you.

Errant Record Removal Assistance

## 11.2 Errant Record Removal Assistance

This tool was added to make it easier for Users to request a document be removed from the current record. This action creates an appropriate audit trail for HUD to ensure we are not erroneously removing documents from the official record. A training video has been added to this page, as well as the “Training” tab on the Quick Navigation Toolbar.



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General/Technical Support

Errant Record Removal Assistance

### Need Assistance Removing Errant Records ?

Property8\*\*\*\*\*  
Document Type1199A Direct Deposit  
Document StatusActive

[Version History](#)  
View Version No.0

If you notice a mistake after uploading and need the Record removed, don't worry.. Just provide us with the necessary information below and your request will be reviewed at the end of the Week.

**\*The Details link will provide the required information.\***

Once you confirm all your information is correct, submit this form and you will receive a group automated follow-up email for your Manager to confirm the removal is necessary.

IREMS/Property Number:
Document Type: Select Type of Search
Version Number:
Managers Email:
Brief Description of Problem:

[Demonstration](#)
[Submit](#)
[Reset](#)