CHAIS User Management System Guide





THE AGENCY FOR CO-OPERATIVE HOUSING L'AGENCE DES COOPÉRATIVES D'HABITATION

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Co-op Administrator Guide

Getting Started with Registration

- 1. The Agency sends a "User Registration" email to the co-op's main contact. The main contact can forward the email to the person designated as co-op admin, if this is not the main contact. If the email is not received, please check the junk or spam folder.
- 2. In the email, click on the "User Registration Link".



3. The person designated as the co-op admin clicks on the "User Registration Link" in the email bringing them to the registration page.





- 4. The co-op admin completes the registration form with their own email. They must create a new username, different from the one the co-op has used in the past. They complete the process by accepting the Terms & Conditions and clicking on "Register".
- 5. Registration successful!



- 6. A "User Verification" email is sent to the co-op admin at the email address provided in the previous step.
- 7. Click on the "User Verification Link" in the email.



8. The co-op admin account has been validated. Go back to login.





9. Login with the registered username and password.



10. For initial login, verify using multi-factor authentication. Choose email or text message to receive the security code. Fill in your information and press Submit. Users will be asked to authenticate if they change IP address or browser or if they haven't signed in for 30 days.

Multi-Factor Authentication		Multi-Factor Authenticatio	on
Register		Register	
EMAIL	TEXT MESSAGE	EMAIL	TEXT MESSAGE
Email* example@gmail.com		Phone Number*	
Confirm Email*		Confirm Phone Number*	
Confirm Email		Confirm Phone Number	r
SUB	міт	รเ	JBMIT
Back to Login		Back to Login	



11. A "Your Security Access Code" email or text message is sent to the co-op admin. Check for an email or text message within 15 minutes.

CHAIS - MFA - Your Security Access Code



CHAIS Support Team

Text Message • SMS Thu, Feb 13 at 9:01AM

Dear John Doe, Your CHAIS multi-factor authentication code is:

408005

Please enter this code to complete your login.



12. Enter the six-digit security code you received by email or text message. Click on Verify.



13. This shows the co-op's CHAIS Welcome page.

1	The Agency for Cooperative Housing Capacity for Cooperative of Housing	Vinicome, johndoe Admin Profile Logout Public Ste Hometiun Pranceis Help
ń	Spon .	ugenxy.coop
	Intel Constitutions of the Statements of the Sta	
	Welcome Agreements Reports	
	Welcome	
	Welcome to the Agency's client website.	
	This is your gateway to Julable information for you and your co-op. Co-op managers, experienced volunteers and newer members can all find something of interest here.	
	Agreements View or download legal agreements, such as your operating agreement with CMHC. Reports Consult your Annual Information Returns and Agency reports. If your co-op files budgets and monitoring reports with the Agency, you do that here.	
	For useful resources and <u>usefulse</u> , please visit our <u>public restorte</u> .	

User Administration Access

1. Once the co-op admin signs in, they have access to two new links: Admin and Profile



The "Admin" link will lead to the User Management page to create new users and maintain users' roles and profiles. The "Profile" link will show profile settings.



User Management Page

1. To access "User Management", click on the "Admin" link.



Here, all registered users for the co-op are displayed. Initially, only the co-op admin is shown. (The user type is co-op; sub-type is admin.)

On this page, the co-op admin can create new co-op users, assign access according to role, remove access and see a log of co-op users' activity. **N.B.: It is important to remove access when an individual** <u>leaves</u> the co-op or their <u>role</u> changes.

CO OPEN	ra voja Inna kodelana Hel Innas o nukartantok									JD Joh	n Doe 🕻
User M	anagement	ВАСК	Sea	arch			Q			c	REATE NEW USER
User Type	User Subtype	Usemame	Full Name	Email	Roles		Locked(Inactive Date)	Password Change Required	Updated By	Updated On	Actions
Соор	Admin	johndoe	John Doe	johndoe@agency.test	Co-op	Co-op-Admin		2025/02/19		2025-02-19	=,
				Show	15 👻	1of1 I<	< > >1				

2. Click on the edit symbol under "Actions" to view a profile and make changes. There are two user sub-types: Admin and User. The admin (co-op administrator) has access to their own Profile page and also the profiles of all users. Users have access only to their own profile.

										1
User Type	User Subtype	Username	Full Name	Email	Roles	Locked(Inactive Date)	Password Change Required	Updated By	Updated On	Actions
Соор	Admin	johndoe	John Doe	johndoe@agency.test	Co-op Co-op-Admin		2025/02/19		2025-02-19	₩.



Profile

3. The "Profile" page appears. User information can be changed here. If changes are made, press "Save" at each page.

BACK]	John Do	be	
	PROFILE	Profile		SAVE
	CHANGE PASSWORD	Personal Information		
	ADMIN	Full Name*		
	USER ROLES	John Doe	Dhana Numban Dh	
:	SECURITY	johndoe@agency.test	(123) 123-1234	x000
	LOGS	User Information		
		User Type	User Subtype	
		Соор	Admin	*
		Organization Name		
		Winkleigh		
		Note		
		Enter note here		



Change Password

4. To change a password, go to the "Change Password" page. Co-op users and admins can change their own passwords here. Press "Save" to apply any changes made.

PROFILE	Change Password s/	WE
CHANGE PASSWORD	Current Password	
USER ROLES	Password	8
SECURITY	New Password*	-
	At least 8 characters An uppercase letter A lowercase letter A number A symbol Confirm New Password*	6
	Confirm New Password	Ś



Admin

5. The "Admin" page allows removal of a user's access by locking them down. At the "User Locked" section, click on the toggle to deactivate the account.

PROFILE	Admin	SAVE
CHANGE PASSWORD	User Locked Inactive Date	Reset Password Reset Date: 2024-12-11
USER PERMISSIONS	4	
SECURITY		
LOGS		
PROFILE	Admin	SAVE
PROFILE CHANGE PASSWORD	Admin	SAVE

If a locked-out user attempts to log in, they will receive an error message.



A password reset can also be activated. Next time the user attempts to log in they will be prompted to reset their password.





User Roles

6. The "User Roles" page allows the admin to grant or change co-op users' permissions by selecting from a menu of roles. The admin will have permission to all roles by default as per their Service Bundle agreement. **N.B.: when adjusting roles for a logged-in user, they will need to log out and log back to see changes.**

If a user is added, but no roles are assigned to them, they will have access to just the co-op's agreements and reports.

PROFILE	User Roles	SAVE
CHANGE PASSWORD	Default Roles	
ADMIN	Co-op Co-op-Admin	
USER ROLES	Available Roles	
SECURITY	Rental Assistance Claim Entry	
LOGS	Rent Supplement Claim Entry	
	Budget Entry	
	Monitoring Report Entry	
	Property Inspection Support	
	Action Plan Entry	
	Self-Assessment Entry	
	AIR Certification	

Role Definitions:

Rental Assistance Claim Entry:

Enter rental assistance calculations for assisted households. Update housing charges, utilities, non-subsidized services and shelter component information. Submit rental assistance claims to the Agency.

Rent Supplement Claim Entry:

Enter rent supplement information for assisted households. Update housing charges and utility information. Submit rent supplement claims to the Agency.

Budget Entry:

Enter co-op's proposed budget information. Submit budget to the Agency.



Monitoring Report Entry:

Enter information about arrears, vacancies, and co-op financial situation on a monthly or quarterly basis if required by the Agency. Submit monitoring reports to the Agency.

Property Inspection Support:

Complete Pre-inspection Questionnaire when co-op's property has been scheduled for inspection by the Agency.

Action Plan Entry:

Enter and submit co-op's three-year Action Plan required for Rental Assistance Program co-ops). Enter and submit annual updates for the Action Plan.

Self-Assessment Entry:

Complete the co-op's Self-Assessment.

AIR Certification:

Complete the co-op's AIR Certification

Security

7. The "Security" page shows the current multi-factor authentication details and a button to reset the MFA.

PROFILE	Multi-Factor	Authentica	tion	RESET MFA
CHANGE PASSWORD				
ADMIN	Status	Enabled	Method	Email
USER PERMISSIONS				
SECURITY &	Registered Email		adrian.carm	ichael@balanced.plus
LOGS				



Logs

8. The "Logs" page shows the activity history.

PROFILE	Logs	Log Category	•
CHANGE PASSWORD	Activity	Category	CreatedOn
ADMIN	Login Regitration Successful.	Login	12/11/2024 8:46:27 PM
	User Created.	User	12/11/2024 8:46:27 PM
USER PERMISSIONS	Login Verification Email Sent.	Login	12/11/2024 8:46:29 PM
SECURITY	Login Password Success.	Login	12/11/2024 8:47:58 PM
	MFA Registration: Sent	Mfa	12/11/2024 8:47:58 PM
LOGS	MFA Challenge: Email Sent.	Mfa	12/11/2024 8:50:01 PM
	MFA Challenge Success: Passed MFA Challenge.	Mfa	12/11/2024 8:50:36 PM
	Login Success: Logged in using MFA.	Login	12/11/2024 8:50:36 PM
	Show 15 * 1.8 of 8	10 0	3 31

Create New User

1. Click on the Admin tab. Then click on "User Management".





2. The admin can create new users by clicking on the "Create New User" button.



Fill out all the required fields. Co-op users are assigned roles that give them access to specific areas of CHAIS. (User type is Co-op; user subtype is User; Organization Name is your co-op.)

A username and password are created for the user. Please note, you will not be able to view the password once you leave this page. Share the username and password with the user through a secure method so they can complete their initial login. Select Reset Password to force the user to choose a new password upon logging in the first time.

If a user is added, but no roles are assigned, they will have access to the coop's agreements and reports only.

If you are using English as your language preference in CHAIS, the verification email sent out to the new user will be in English. If you want the email to be sent in French you must go back and login again with French selected.



Personal Information	5 11 11			
Username*	Full Name*		Email*	
Username	Full Name		example@gmail.com	
Phone Number		Phone Ext.		
Phone Number		Phone Ext.		
Password*		Confirm Password*		
Password	Ś	Confirm Password		B
At least 8 characters O An uppe	ercase letter	-		
A lowercase letter A number	A symbol			
g monorene letter g minere	C ristinger			
User Information				
User Information	Hear Subturna*		Organization Name	
User Information User Type*	User Subtype*		Organization Name	
User Information User Type*	User Subtype*	*	Organization Name	
User Information User Type* User Roles	User Subtype*	*	Organization Name	×
User Type* User Roles Available Roles	User Subtype*	٣	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information	User Subtype*	Note	Organization Name	×
User Information User Type* User Roles Available Roles Admin Information User Locked	User Subtype*	Note	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information User Locked Inactive Date:	User Subtype*	Note	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information User Locked Inactive Date:	User Subtype*	Note Enter note here	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information User Locked Inactive Date: Reset Password Reset Date:	User Subtype*	Note Enter note here	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information User Locked Inactive Date: Reset Password Reset Date:	User Subtype*	Note	Organization Name	•
User Information User Type* User Roles Available Roles Admin Information User Locked Inactive Date: Reset Password Reset Date:	User Subtype*	Note Enter note here	Organization Name	•

Once "Save" is pressed, a "<u>User Verification</u>" email is sent to the co-op user's email address. Once they validate the email, they will be prompted to set up their multi-factor authentication.



Co-op User Guide

Getting Started

- 1. A "User Verification" email is sent by the co-op administrator at their co-op. If the email is not in the inbox, please check the junk or spam mail folder.
- 2. Open the email and click on the "User Verification Link".



3. The co-op user account has been validated. Go back to login.





4. Login with the username and password given by the co-op admin. If you haven't received it, contact your co-op admin. We recommend that you change your password upon logging in the first time.

Lo-op Housing Age Information Syster	n
Username	
johndoe	
Password	Reset password
••••••	0
Remember me (username only)	Get Help
LOGIN	

5. For initial login, verify using multi-factor authentication. Choose email or text message. Fill in the form and press "Submit". Authentication will occur again if there is a change in IP address, browser or if they haven't signed in for 30 days.

Multi-Factor Authentication		Multi-Factor Authentication	ı
Register		Register	
EMAIL	TEXT MESSAGE	EMAIL	TEXT MESSAGE
Email*		Phone Number*	
Confirm Email*		Confirm Phone Number*	
Confirm Email		Confirm Phone Number	
SUB	міт	SUE	зміт
Back to Login		Back to Login	



6. Verify the identity in the last step of the multi-factor authentication. A "Your Security Access Code" email or text message is sent to the co-op user. Check for an email or text message within 15 minutes.

CHAIS - MFA - Your Security Access Code				
KW K .email>	[C Reply	K) Reply All	→ Forward
Dear John Doe,				
Your multi-factor authentication code is: 660249				
As an added level of security, please complete the login proce	ss by entering the above 6-dig	git authentica	ation code.	
Note: This authentication code is valid only for 15 minutes. If yo a new authentication code from the login page.	u wish to login after the authen	ntication cod	e has expire	d, you will need to request
CHAIS Support Team				
Text Message • SMS Thu, Feb 13 at 9:01AM				
Dear John Doe, Your CHAIS multi-factor authentication code is:				
<u>408005</u>				
Please enter this code to complete your login.				



7. Enter the six-digit security code received by email or text message. Click on "Verify".



8. This shows the co-op's CHAIS Welcome page.

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odewi sod

Profile Page

1. The co-op user has a new "Profile" link.



The "Profile" link will show their profile settings.



Profile

2. The "Profile" page appears. User information can be changed here. If changes are made, click "Save" before leaving the page.

BACK	James D	oe	
PROFILE	Profile		SAVE
CHANGE PASSWORD	Personal Information		
1000	James Doe		10
LOGS	Email*	Phone Number	Phone Ext.
	jamesdoe@agency.test	Phone Number 🕌	×000
	User Information		
	User Type	User Subtype	
	Соор	User	
	Organization Name		
	Winkleigh		
	Note		
	Enter note here		



Change Password

3. To change the password, go to the "Change Password" page. Press "Save" to apply any changes made.

PROFILE	Change Password SAVE
CHANGE PASSWORD	Current Password
SECURITY	Current Password*
LOGS	Password
	New Password New Password*
	New Password
	At least 8 characters O An uppercase letter O A lowercase letter
	A number A symbol
	Confirm New Password*
	Confirm New Persyand

Security

4. The "Security" page shows the current multi-factor authentication details and allows you to reset the MFA.

PROFILE CHANGE PASSWORD	Multi-Factor Authenticati	on		RESET MFA
SECURITY	Status	Enabled	Method	Email
OGS				
	Registered Email		jamesd	oe@agency.test



Logs

5. The "Logs" page shows the activity history.

PROFILE	Logs	Log Category	•
CHANGE PASSWORD	Activity	Category	CreatedOn
SECURITY	User Created	User	2/20/2025 3:36:27 PM
	Login Verification Email Sent.	Login	2/20/2025 3:36:30 PM
LOGS	Login Password Success.	Login	2/20/2025 3:53:24 PM
	MFA Registration: Sent	Mfa	2/20/2025 3:53:24 PM
	MFA Challenge: Email Sent.	Mfa	2/20/2025 3:54:50 PM
	MFA Challenge Success: Passed MFA Challenge.	Mfa	2/20/2025 3:55:24 PM
	Login Success: Logged in using MFA.	Login	2/20/2025 3:55:24 PM
	Login Password Success.	Login	2/20/2025 4:40:48 PM
	Login Success: Logged in using pessword only.	Login	2/20/2025 4:40:49 PM

Other Help

Password Reset

Welcome to the

1. Password resets can be requested at the login page by clicking on the "Reset password" link or a co-op admin can initiate a password reset.

Reset password
B

or



PROFILE	Admin	SAVE
CHANGE PASSWORD	User Locked	Reset Password
ADMIN	Inactive Date:	Reset Date: 2025-02-
USER ROLES		19

2. When the user attempts to log in, they will see the following message:



3. By clicking on the "Send Instructions" button, an email will be sent.







In the "Reset Password" email, click on the "Reset Password Link".



Create a new password. Click on "Set Password".

Reset Password		
New Password*		
•••••	-B	8
At least 8 characters		
🔮 An Uppercase letter 🛛 🔮 A lowercas	e lett	er
🖉 A number 🛛 🔗 A symbol		
Confirm New Password*		
•••••	в	8
SET PASSWORD		
Back to Login		

Language Mode

Language selection can be done at the login page.



Jsername	
Username	
assword	Reset password
Password	0
	ß

Locked Out

If a locked-out user attempts to log in, they will receive an error message.



A co-op administrator can unlock them from the Admin page.

PROFILE	Admin
CHANGE PASSWORD	
	User Locked
ADMIN	Inactive Date:



Support

Help and Feedback links are available at the login page. Get Help will take you to our CHAIS technical support help desk. Feedback will allow you to send an email to the Agency.



