

CHAIS User Management System Guide



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

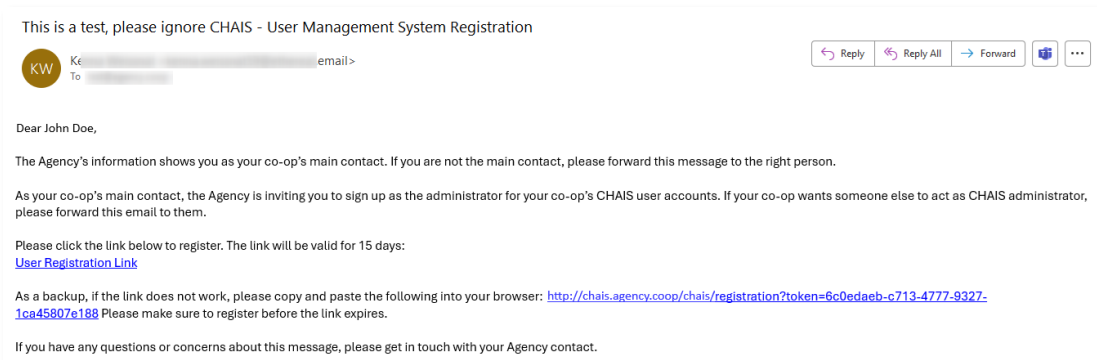
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Co-op Administrator Guide

Getting Started with Registration

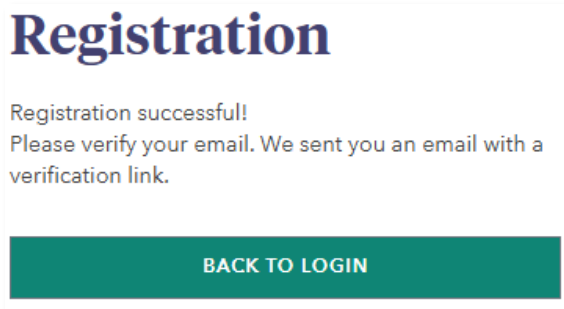
1. The Agency sends a “User Registration” email to the co-op’s main contact. The main contact can forward the email to the person designated as co-op admin, if this is not the main contact. If the email is not received, please check the junk or spam folder.
2. In the email, click on the “User Registration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



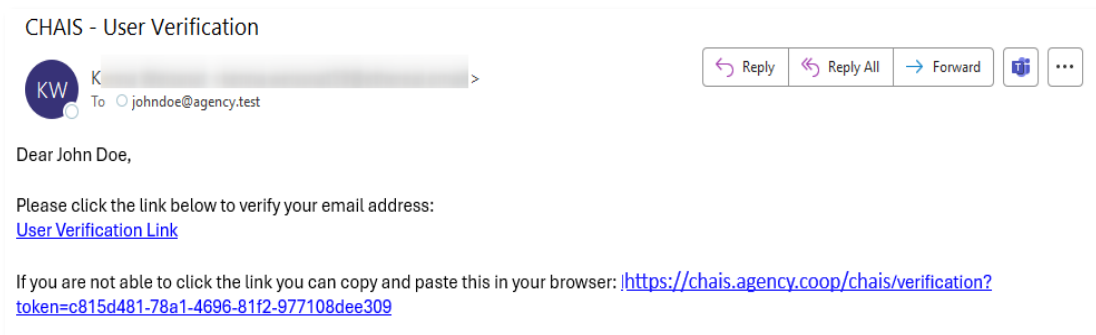
3. The person designated as the co-op admin clicks on the “User Registration Link” in the email bringing them to the registration page.

A screenshot of the CHAIS User Management System Registration page. The page has a header with the CHAIS logo and the text "THE AGENCY FOR CO-OPERATIVE HOUSING". The main content area is titled "Registration" and contains several input fields: "Username*", "Full Name*", "Email*", "Phone Number", "Phone Ext.", "Note", "New Password*", and "Confirm New Password*". There are also checkboxes for "Accept Terms & Conditions" and "I agree to share my contact information with my co-op". A green "REGISTER" button is at the bottom. To the right of the form is a large image of a modern apartment building with a red circle and the text "Each co-op's designated Agency contact person holds their co-op's unique username and password, which can be shared as widely as the Board wishes." The footer contains copyright information and a language selection dropdown.

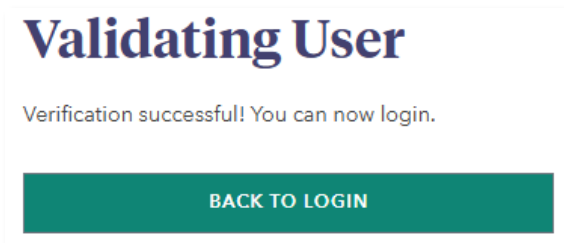
4. The co-op admin completes the registration form with their own email. They complete the process by accepting the Terms & Conditions and clicking on “Register”.
5. Registration successful!



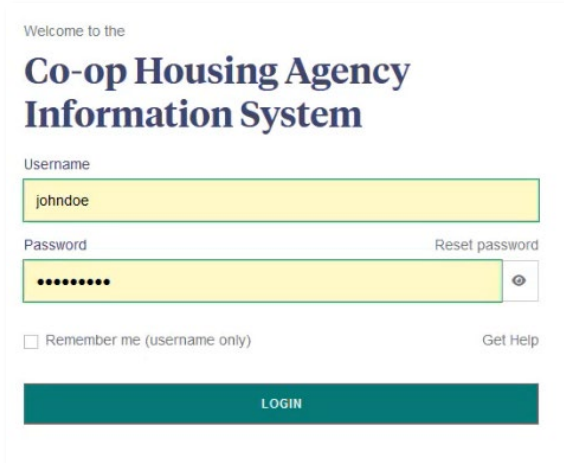
6. A “User Verification” email is sent to the co-op admin at the email address provided in the previous step.
7. Click on the “User Verification Link” in the email.



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



9. Login with the registered username and password.



Welcome to the

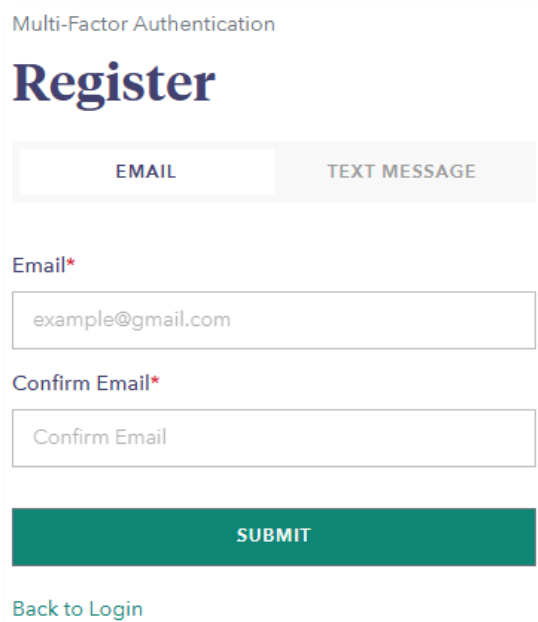
Co-op Housing Agency Information System

Username

Password [Reset password](#)

☐ Remember me (username only) [Get Help](#)

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

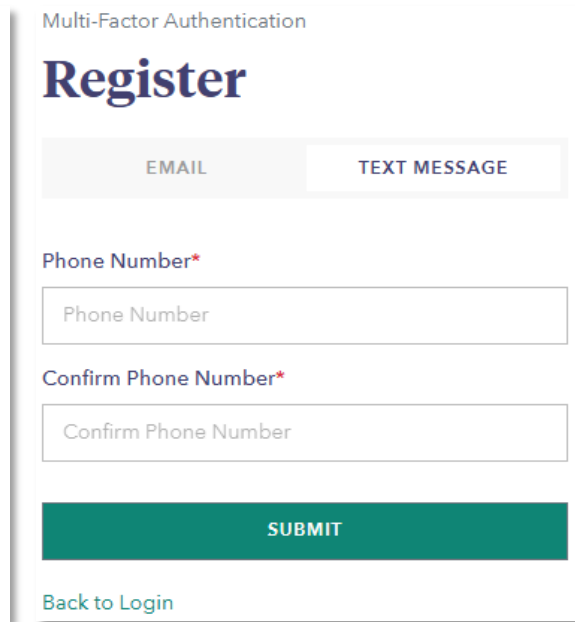
Register

EMAIL TEXT MESSAGE

Email*

Confirm Email*

[Back to Login](#)



Multi-Factor Authentication

Register

EMAIL TEXT MESSAGE

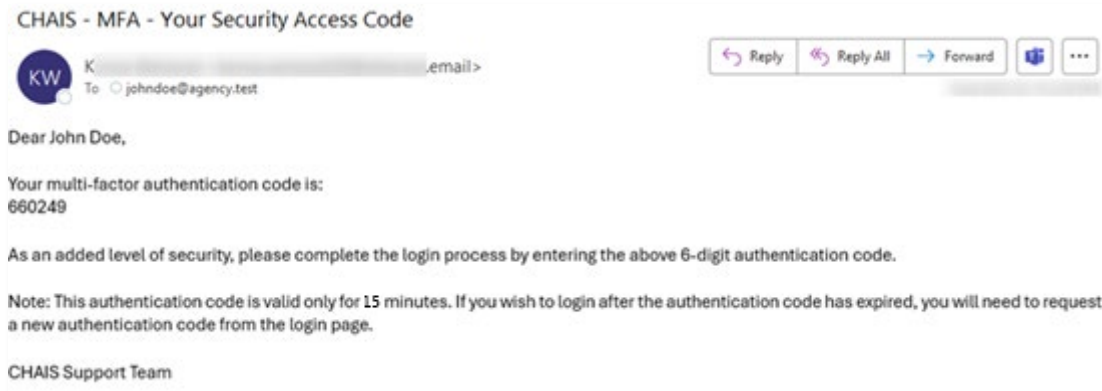
Phone Number*

Confirm Phone Number*

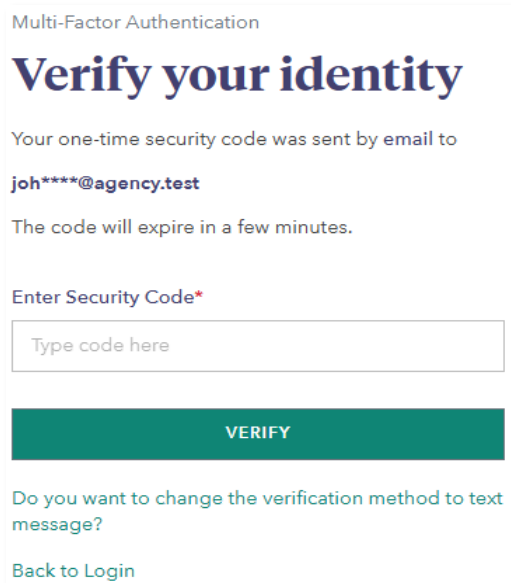
[Back to Login](#)



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.



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



Multi-Factor Authentication

Verify your identity

Your one-time security code was sent by email to
joh**@agency.test**

The code will expire in a few minutes.

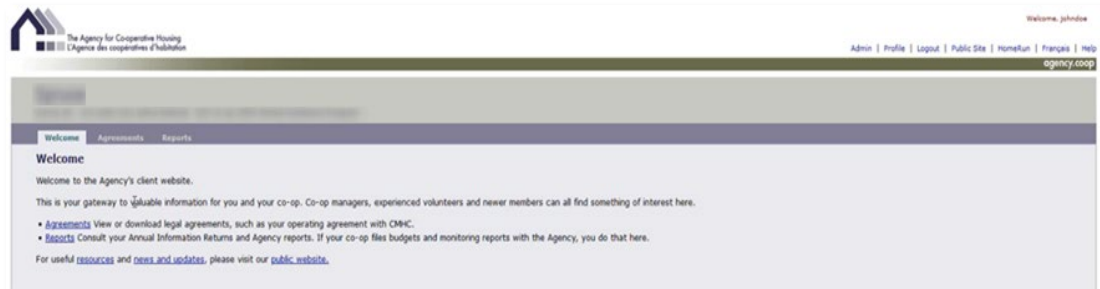
Enter Security Code*

VERIFY

Do you want to change the verification method to text message?

[Back to Login](#)

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



User Administration Access

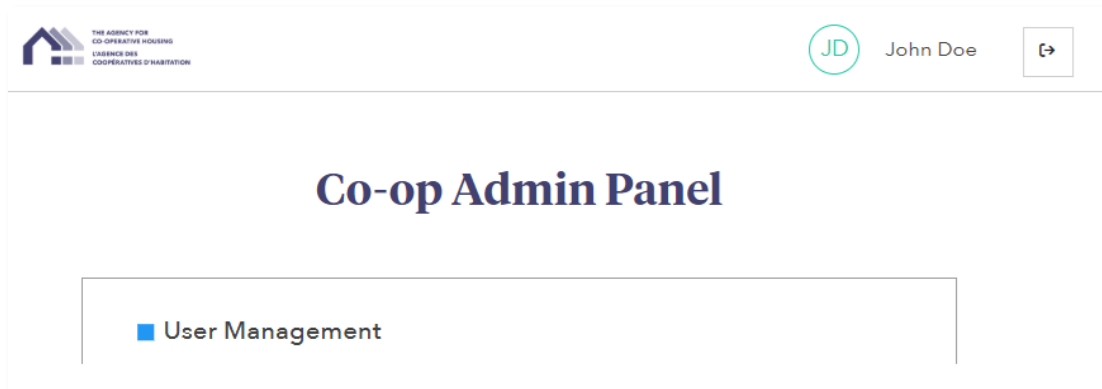
1. Once the co-op admin signs in, they have access to two new links: Admin and Profile



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.

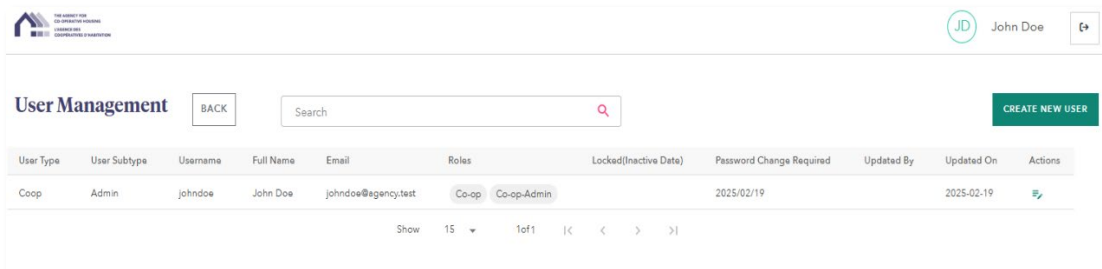
User Management Page

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

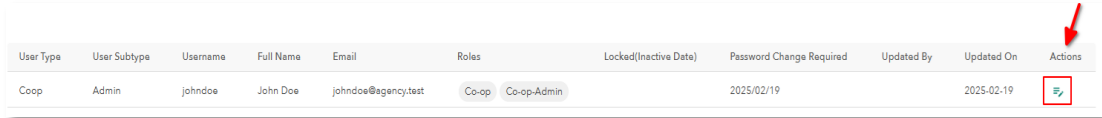



Here, all registered users for the co-op are displayed. Initially, only the co-op admin is shown. (The user type is co-op; sub-type is admin.)

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 leaves the co-op or their role changes.**



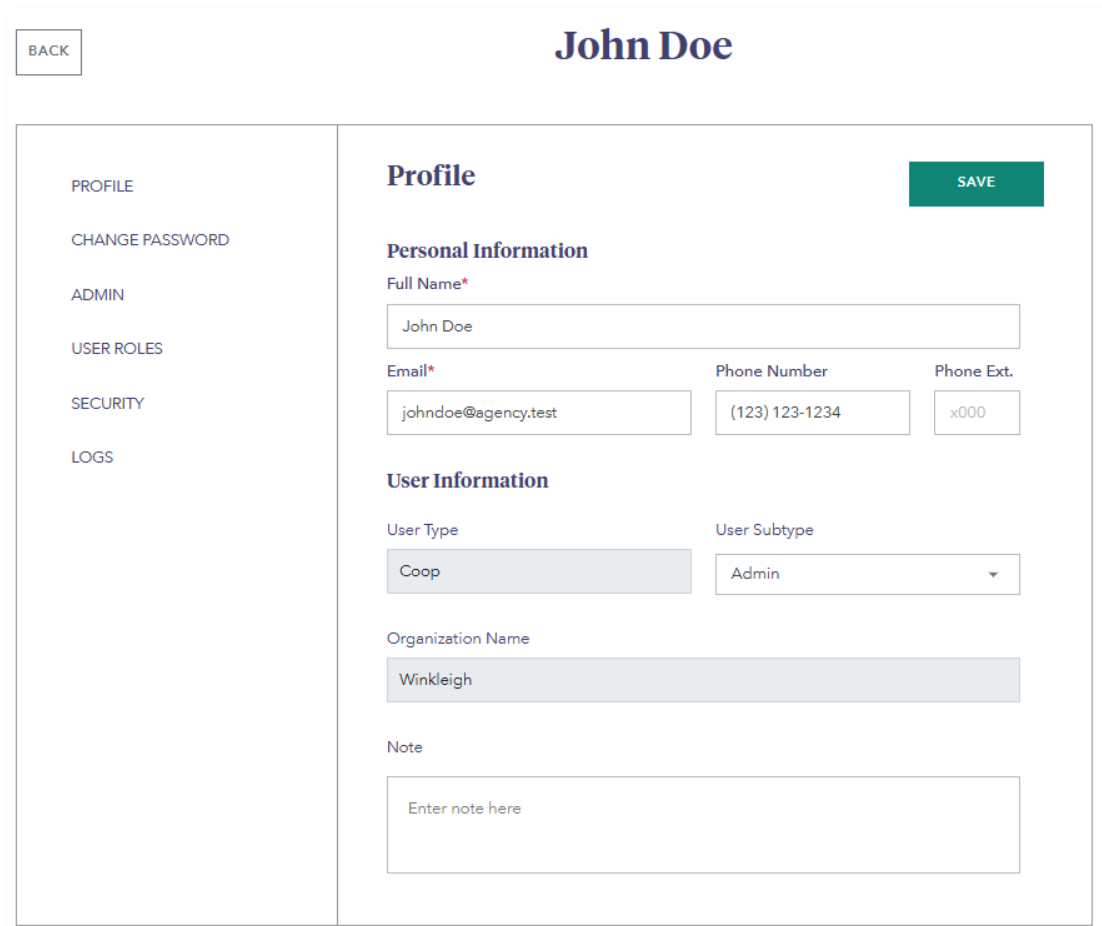
2. Click on the edit symbol under “Actions” to view a profile and make changes. There are two user sub-types: Admin and User. The admin (co-op administrator) has access to their own Profile page and also the profiles of all users. Users have access only to their own profile.



User Type	User Subtype	Username	Full Name	Email	Roles	Locked(Inactive Date)	Password Change Required	Updated By	Updated On	Actions
Coop	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 Doe

[PROFILE](#)[CHANGE PASSWORD](#)[ADMIN](#)[USER ROLES](#)[SECURITY](#)[LOGS](#)

Profile

SAVE

Personal Information

Full Name*

John Doe

Email*

johndoe@agency.test

Phone Number

(123) 123-1234

Phone Ext.

x000

User Information

User Type

Coop

User Subtype

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.

Change Password SAVE

Current Password
Current Password*

Password

New Password
New Password*

New Password

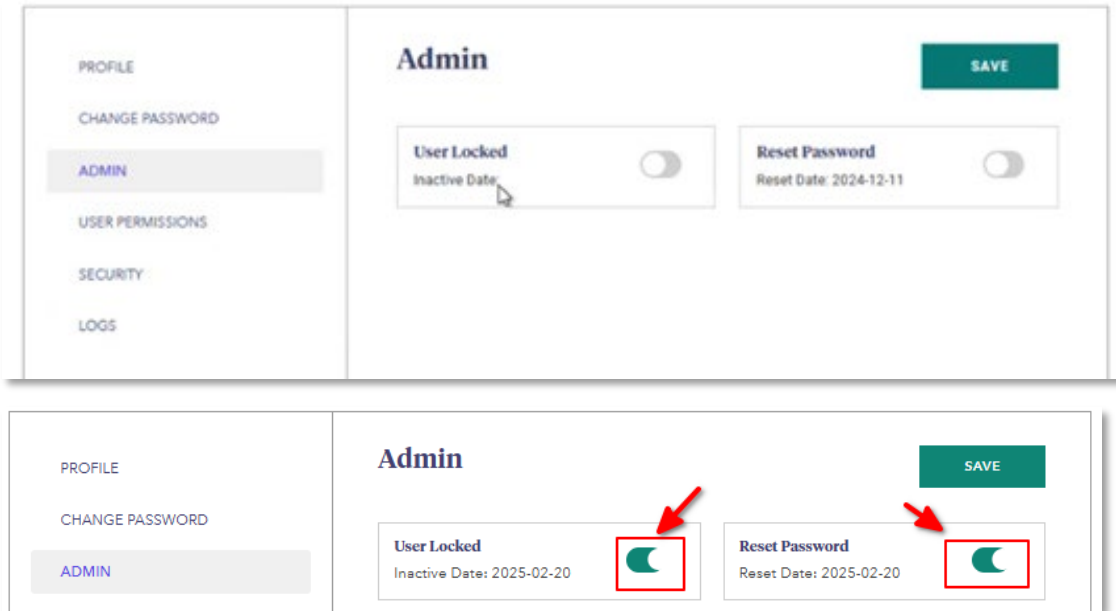
At least 8 characters An uppercase letter A lowercase letter
A number A symbol

Confirm New Password*
Confirm New Password

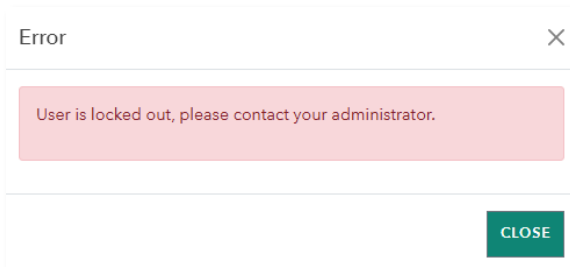


Admin

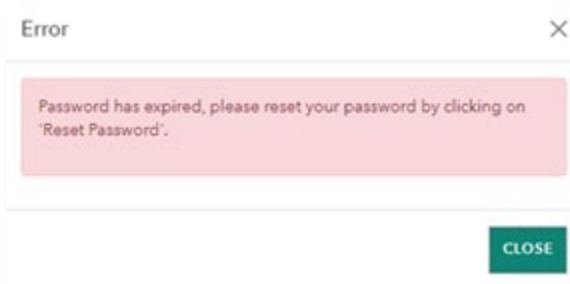
5. The “Admin” page allows removal of a user’s access by locking them down. At the “User Locked” section, click on the toggle to deactivate the account.



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



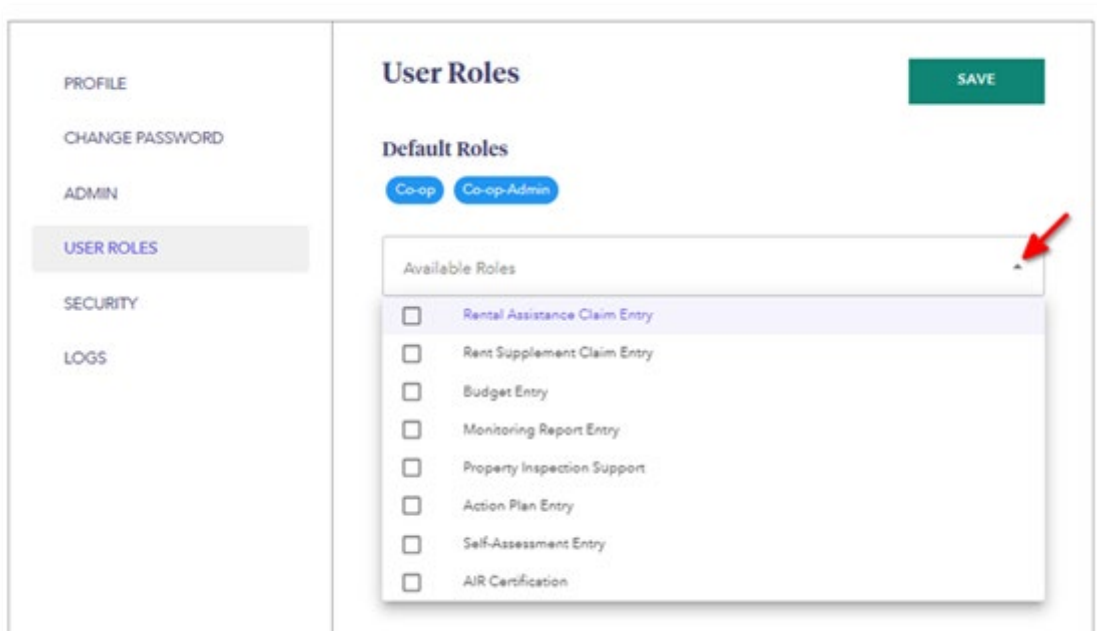
A password reset can also be activated. Next time the user attempts to log in they will be prompted to reset their password.



User Roles

- 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.



The screenshot shows the 'User Roles' management page. On the left is a sidebar with navigation links: PROFILE, CHANGE PASSWORD, ADMIN, USER ROLES (highlighted), SECURITY, and LOGS. The main content area is titled 'User Roles' and includes a green 'SAVE' button in the top right. Below the title, there are 'Default Roles' buttons for 'Co-op' and 'Co-op-Admin'. A dropdown menu labeled 'Available Roles' is open, showing a list of roles with checkboxes: Rental Assistance Claim Entry, Rent Supplement Claim Entry, Budget Entry, Monitoring Report Entry, Property Inspection Support, Action Plan Entry, Self-Assessment Entry, and AIR Certification. A red arrow points to the dropdown arrow icon on the right side of the 'Available Roles' box.

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:

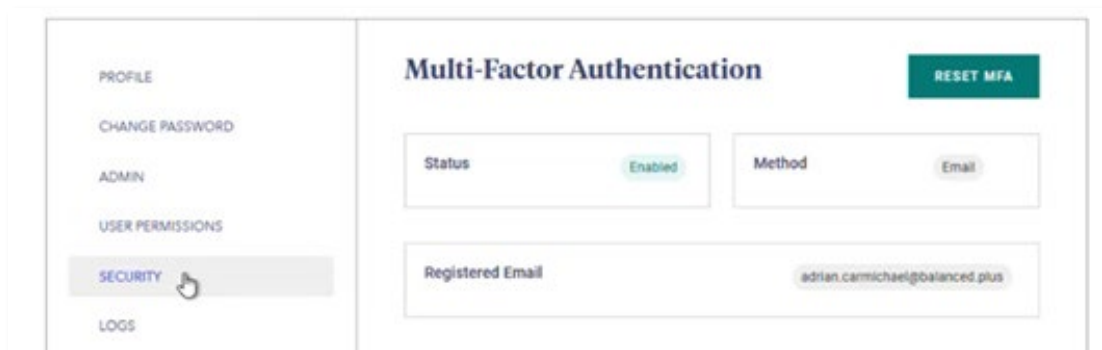
Complete the co-op's Self-Assessment.

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.



Logs

1. The “Logs” page shows the activity history.

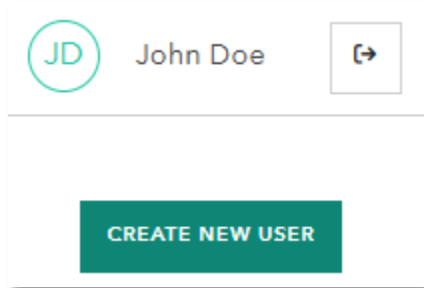
Activity	Category	CreatedOn
Login Registration Successful.	Login	12/11/2024 8:46:27 PM
User Created.	User	12/11/2024 8:46:27 PM
Login Verification Email Sent.	Login	12/11/2024 8:46:29 PM
Login Password Success.	Login	12/11/2024 8:47:58 PM
MFA Registration: Sent	Mfa	12/11/2024 8:47:58 PM
MFA Challenge: 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

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.



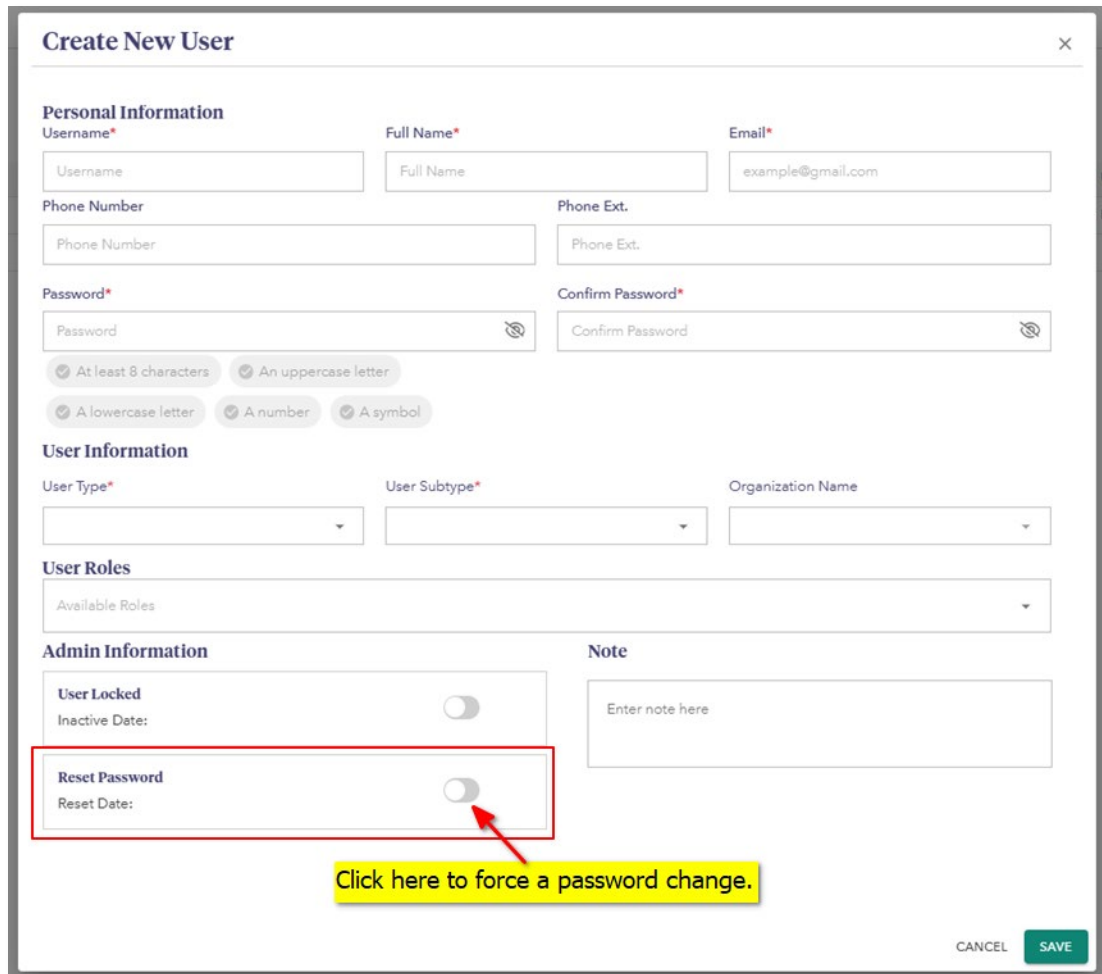
Fill out all the required fields. Co-op users are assigned roles that give them access to specific areas of CHAIS. (User type is Co-op; user subtype is User; Organization Name is your co-op.)

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 co-op'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.





The image shows a 'Create New User' form with several sections: Personal Information, User Information, User Roles, Admin Information, and a Note field. The Personal Information section includes fields for Username, Full Name, Email, Phone Number, and Phone Ext. The Password section has fields for Password and Confirm Password, with a list of password requirements: At least 8 characters, An uppercase letter, A lowercase letter, A number, and A symbol. The User Information section includes dropdowns for User Type, User Subtype, and Organization Name. The User Roles section has a dropdown for Available Roles. The Admin Information section includes toggle switches for User Locked, Inactive Date, Reset Password, and Reset Date. The Note field is a text area for entering a note. A red box highlights the Reset Password toggle switch, and a yellow callout box with an arrow points to it, stating 'Click here to force a password change.' The form has CANCEL and SAVE buttons at the bottom right.

Create New User

Personal Information

Username* Full Name* Email*

Phone Number Phone Ext.

Password* Confirm Password*

At least 8 characters An uppercase letter
A lowercase letter A number A symbol

User Information

User Type* User Subtype* Organization Name

User Roles

Available Roles

Admin Information

User Locked
Inactive Date:

Reset Password
Reset Date:

Note

Enter note here

CANCEL SAVE

Click here to force a password change.

Once “Save” is pressed, a “[User Verification](#)” 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.

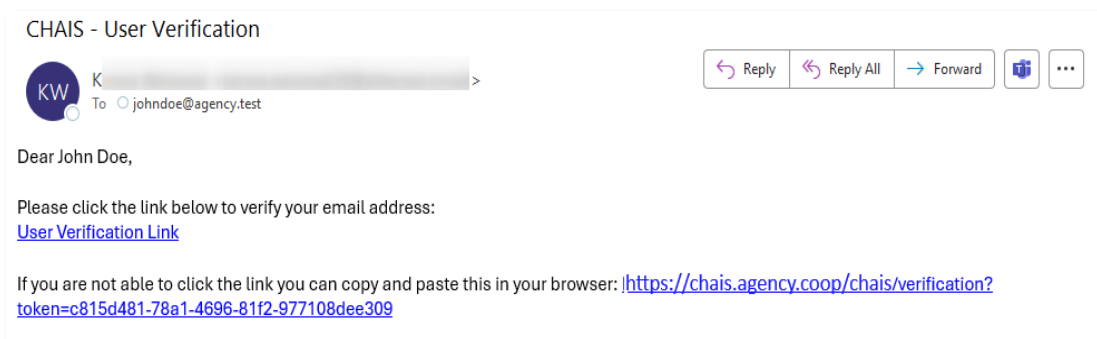


Co-op User Guide

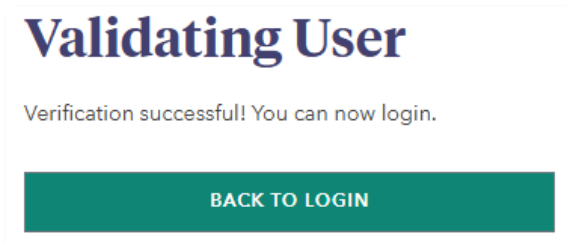
Getting Started

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.



Welcome to the

Co-op Housing Agency Information System

Username

Password [Reset password](#)

☐ Remember me (username only) [Get Help](#)

LOGIN

- 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

Register

EMAIL **TEXT MESSAGE**

Email*

Confirm Email*

SUBMIT

[Back to Login](#)

Multi-Factor Authentication

Register

EMAIL **TEXT MESSAGE**

Phone Number*

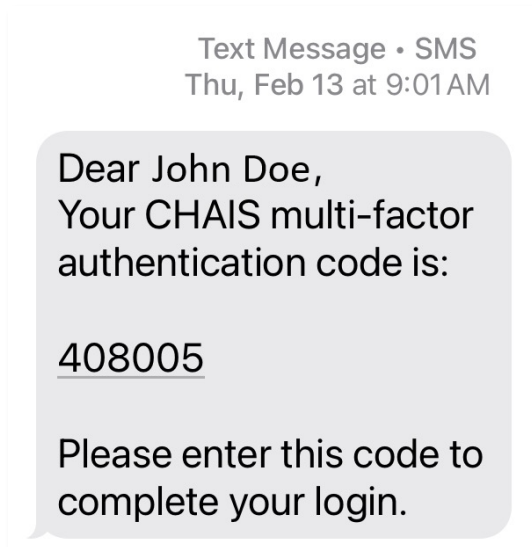
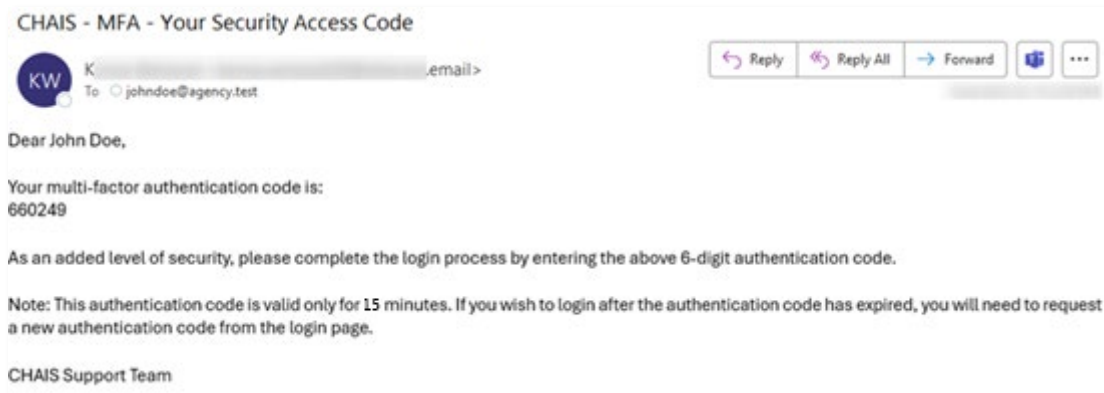
Confirm Phone Number*

SUBMIT

[Back to Login](#)

- 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.





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



Multi-Factor Authentication

Verify your identity

Your one-time security code was sent by email to
joh**@agency.test**

The code will expire in a few minutes.

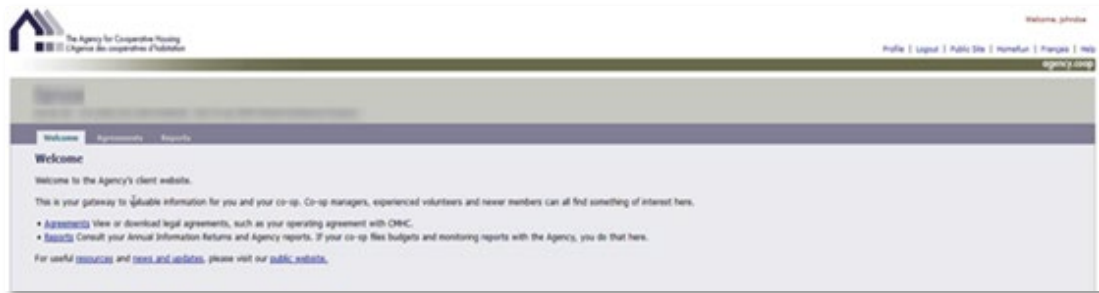
Enter Security Code*

VERIFY

[Do you want to change the verification method to text message?](#)

[Back to Login](#)

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



Profile Page

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





The “Profile” link will show their profile settings.

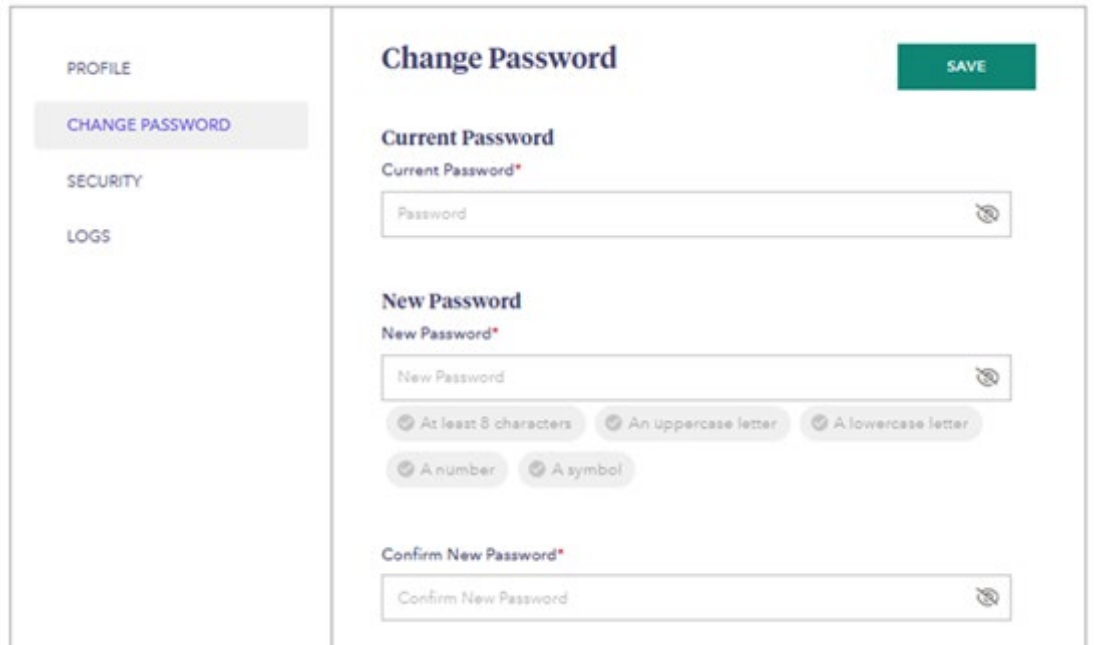
Profile

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

A screenshot of the 'Profile' page for a user named James Doe. The page has a header with a 'BACK' button and the user's name 'James Doe'. On the left is a sidebar with navigation links: 'PROFILE' (highlighted), 'CHANGE PASSWORD', 'SECURITY', and 'LOGS'. The main content area is titled 'Profile' and includes a 'SAVE' button. It contains two sections: 'Personal Information' with fields for 'Full Name*' (James Doe), 'Email*' (jamesdoe@agency.test), 'Phone Number', and 'Phone Ext.' (x000); and 'User Information' with fields for 'User Type' (Coop), 'User Subtype' (User), 'Organization Name' (Winkleigh), and a 'Note' field with the placeholder 'Enter note here'.

Change Password

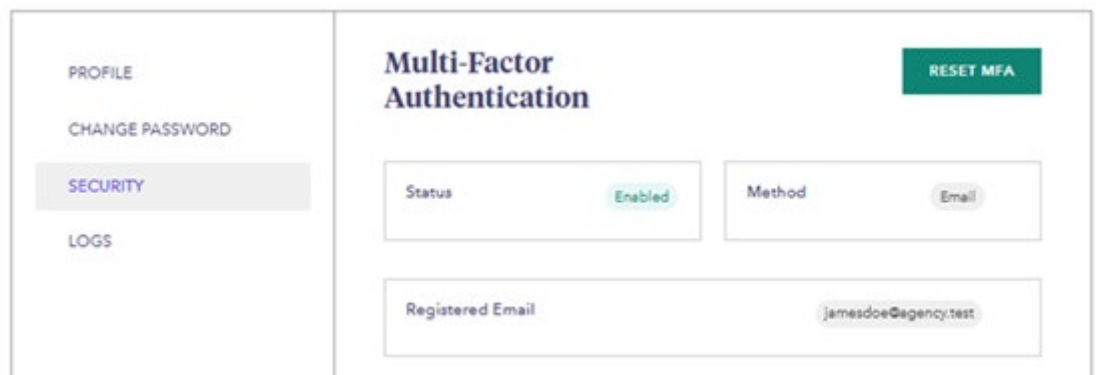
3. To change the password, go to the “Change Password” page. Press “Save” to apply any changes made.



The screenshot shows a web interface for changing a password. On the left is a sidebar with a menu containing 'PROFILE', 'CHANGE PASSWORD' (highlighted), 'SECURITY', and 'LOGS'. The main content area is titled 'Change Password' and features a green 'SAVE' button in the top right corner. Below the title, there are three sections: 'Current Password' with a text input field labeled 'Current Password*'; 'New Password' with a text input field labeled 'New Password*' and five requirement indicators below it: 'At least 8 characters', 'An uppercase letter', 'A lowercase letter', 'A number', and 'A symbol'; and 'Confirm New Password' with a text input field labeled 'Confirm New Password*'. Each input field has a small icon to its right.

Security

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



The screenshot shows a web interface for Multi-Factor Authentication (MFA). On the left is a sidebar with a menu containing 'PROFILE', 'CHANGE PASSWORD', 'SECURITY' (highlighted), and 'LOGS'. The main content area is titled 'Multi-Factor Authentication' and features a green 'RESET MFA' button in the top right corner. Below the title, there are two rows of information: the first row shows 'Status' as 'Enabled' and 'Method' as 'Email'; the second row shows 'Registered Email' as 'jamesdoe@agency.test'. Each piece of information is displayed in a box with a label on the left and the value on the right.



Logs

5. The “Logs” page shows the activity history.

Activity	Category	CreatedOn
User Created	User	2/20/2025 3:36:27 PM
Login Verification Email Sent.	Login	2/20/2025 3:36:30 PM
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 password only.	Login	2/20/2025 4:40:49 PM

Other Help

Password Reset

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.

Welcome to the

Co-op Housing Agency Information System

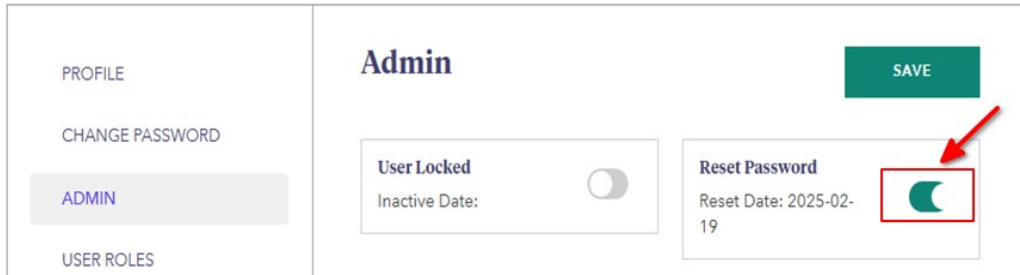
Username

Password

[Reset password](#)

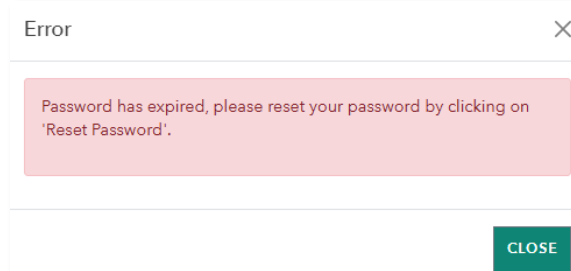
or





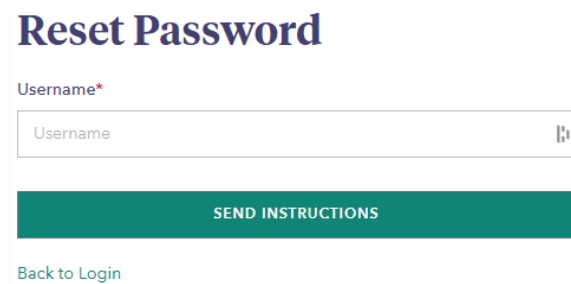
The image shows the 'Admin' user profile settings page. On the left is a sidebar with links: 'PROFILE', 'CHANGE PASSWORD', 'ADMIN' (highlighted), and 'USER ROLES'. The main content area is titled 'Admin' and includes a 'SAVE' button. Below the title are two toggle switches: 'User Locked' (inactive) and 'Reset Password' (active). The 'Reset Password' toggle is highlighted with a red box and a red arrow. Below the 'Reset Password' toggle, the 'Reset Date' is shown as '2025-02-19'.

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

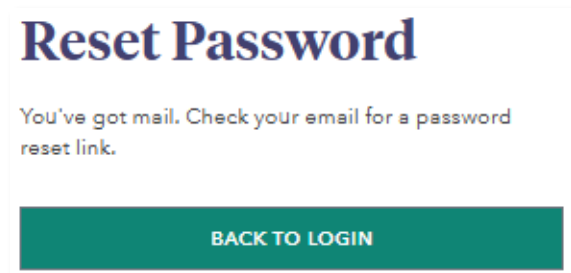


The image shows an 'Error' dialog box with a close button (X) in the top right corner. The message inside the dialog reads: 'Password has expired, please reset your password by clicking on 'Reset Password'.'. At the bottom right of the dialog is a 'CLOSE' button.

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



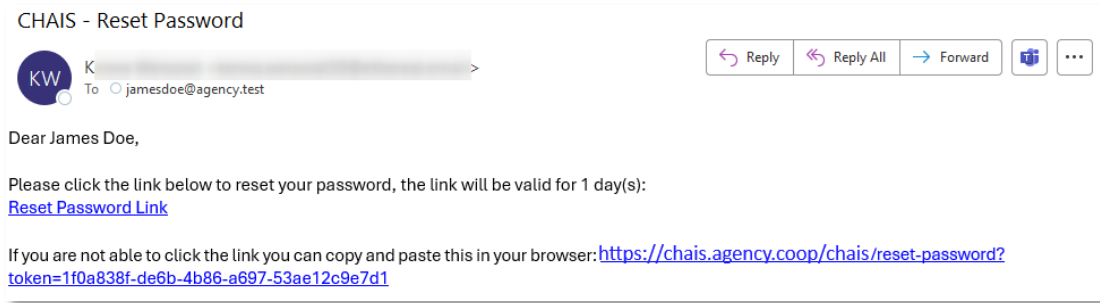
The image shows the 'Reset Password' form. It has a title 'Reset Password' and a 'Username*' label. Below the label is a text input field with the placeholder text 'Username'. Below the input field is a green button labeled 'SEND INSTRUCTIONS'. At the bottom of the form is a link labeled 'Back to Login'.



The image shows the 'Reset Password' confirmation screen. It has a title 'Reset Password' and a message: 'You've got mail. Check your email for a password reset link.'. Below the message is a green button labeled 'BACK TO LOGIN'.



In the “Reset Password” email, click on the “Reset Password Link”.

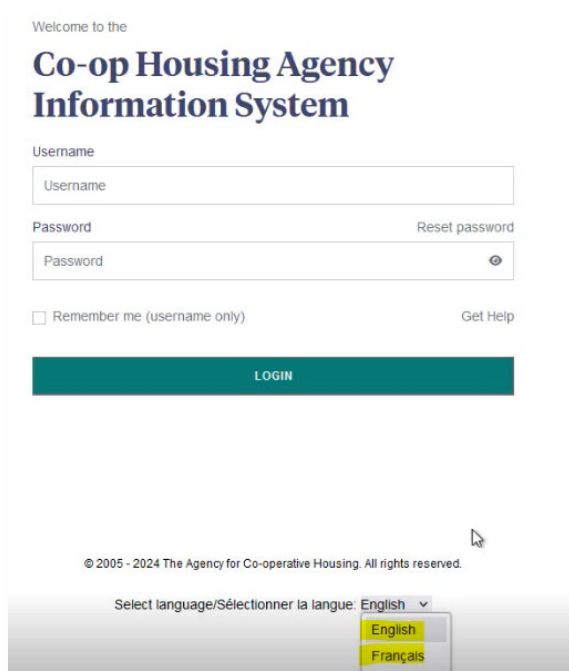


Create a new password. Click on “Set Password”.

A screenshot of a web form titled "Reset Password". It has two password input fields: "New Password*" and "Confirm New Password*", both with visibility toggles. Between the fields are five validation checks, all marked with green checkmarks: "At least 8 characters", "An uppercase letter", "A lowercase letter", "A number", and "A symbol". At the bottom is a large green "SET PASSWORD" button and a "Back to Login" link.

Language Mode

Language selection can be done at the login page.



Welcome to the

Co-op Housing Agency Information System

Username

Password [Reset password](#)

☐ Remember me (username only) [Get Help](#)

LOGIN

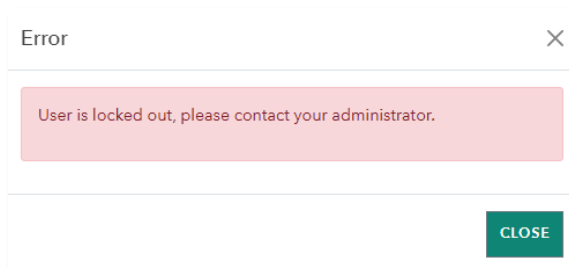
© 2005 - 2024 The Agency for Co-operative Housing. All rights reserved.

Select language/Sélectionner la langue: English ▼

- English
- Français

Locked Out

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



Error

User is locked out, please contact your administrator.

CLOSE

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



PROFILE

CHANGE PASSWORD

ADMIN

Admin

User Locked ☐

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.

Welcome to the

Co-op Housing Agency Information System

Username

Password

[Reset password](#)

☐ Remember me (username only)

[Get Help](#)

LOGIN

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Select language/Sélectionner la langue: English ▼

