TEAPOTS 5.2 Quick Start

# Commonly Asked Questions

How do I log into TEAPOTS?

The new system is identical to the old system with one key difference: the password needs to be at least 8 characters long with at least one upper-case letter, a number and a symbol (!@#$%^&*()_-+=\/?:;<>~`) included. (This is described in Section 3.1 of the v5 User Manual.) For HUD users this is the same requirements as we have to log in to our computers. The UserID and siteID remain the same. **The first time you log on to the new system, your old TEAPOTS password should work even if it does not meet the standards described above. If you had been using an upper-case letter in your old TEAPOTS password, it will be a lower-case letter in the new system until you reset it.**

After you enter your UserID, there will be an additional pop-up legal notice. Read this and hit the OK button.
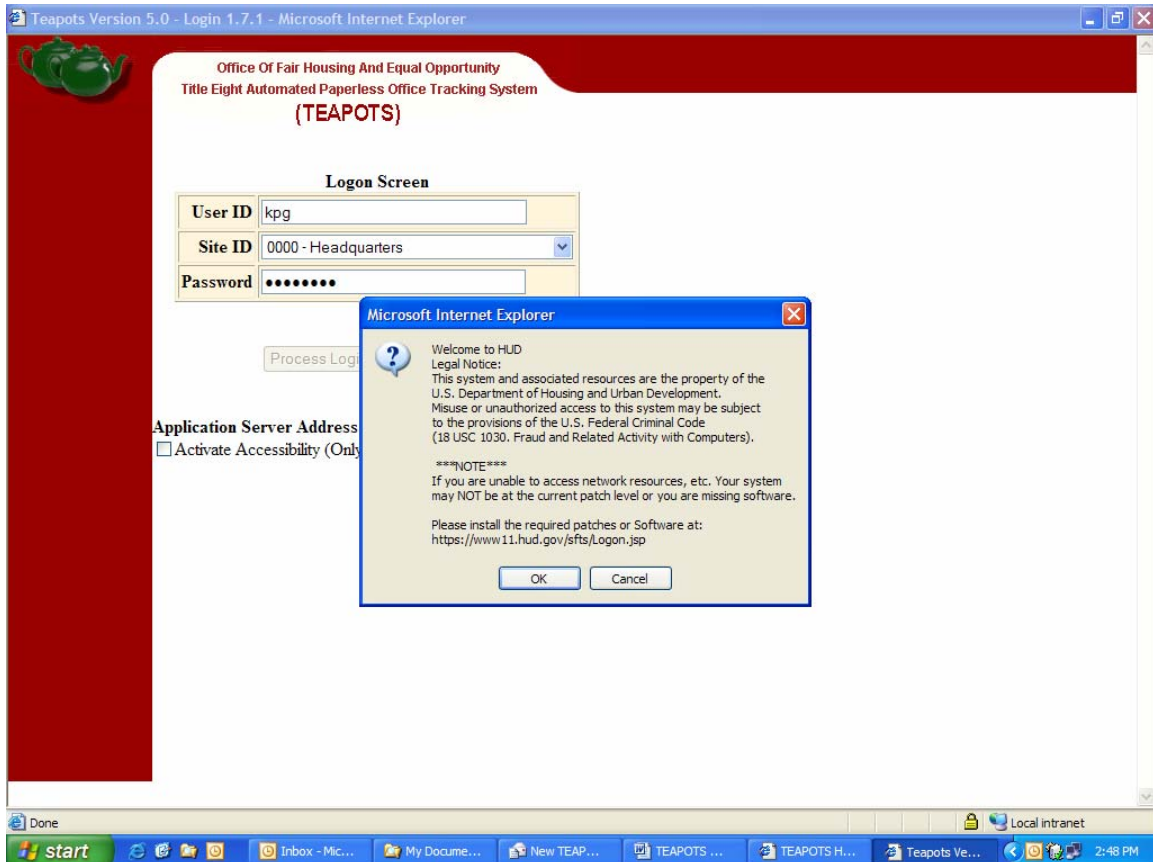
If login fails at this point, you probably mistyped the password. This is a common problem given the rules.

When you get into TEAPOTS for the first time you will have to change your password, again following the requirements for an upper-case letter, one or more numbers and one or more symbols.
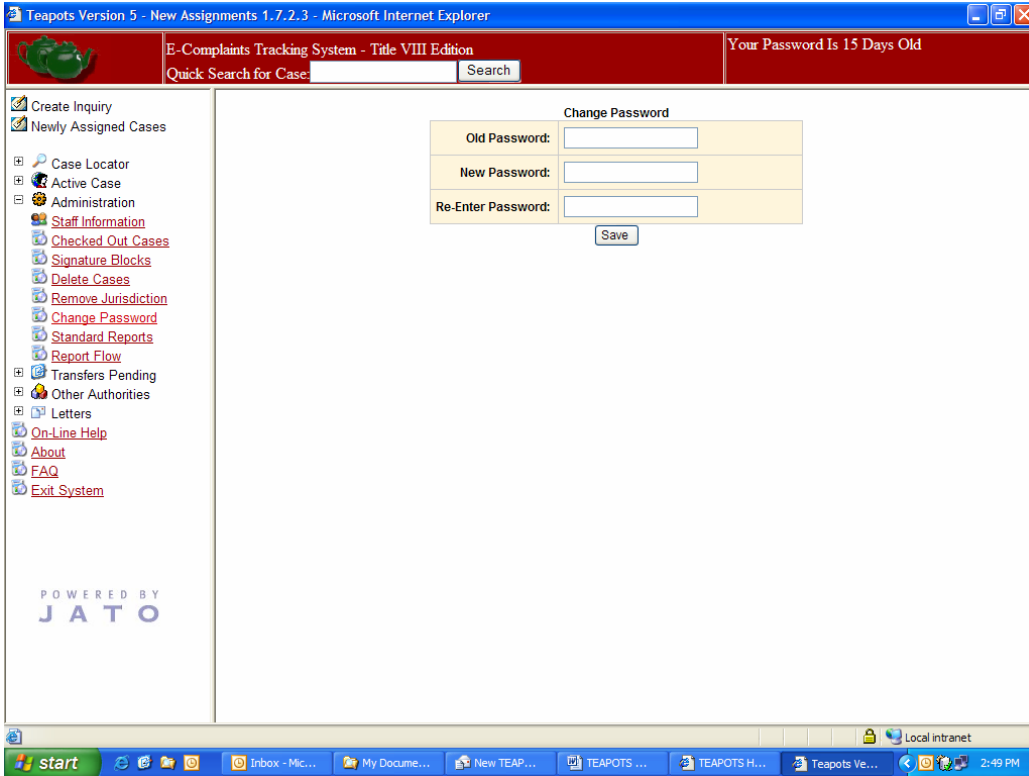
How do I find a case and begin working?

In the new system there is a quick search feature at the top of the screen that you can use anytime to find a case if you know the HUD or FHAP case number or the inquiry number.
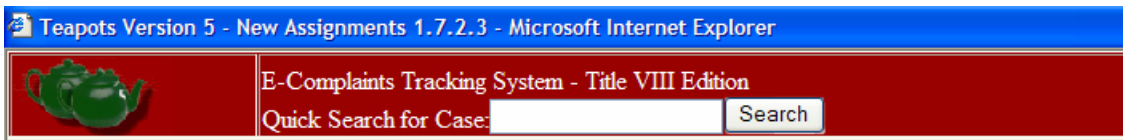
What used to be the Case Review Query in the old system is now called the Locator. Expand the Case Locator option on the left-hand menu and select Locator beneath it.
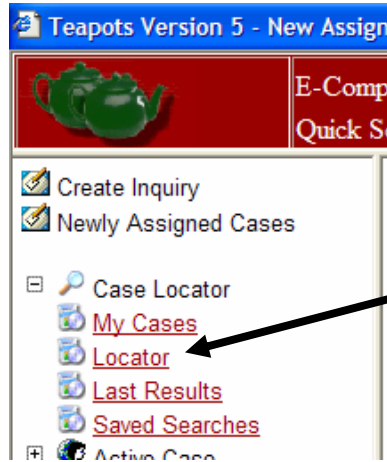
The Locator is very similar to the old Case Review Query; you can enter the criteria, including the complainant's and respondent's name, etc. The new system allows searches by complainant name and respondent name at the same time.
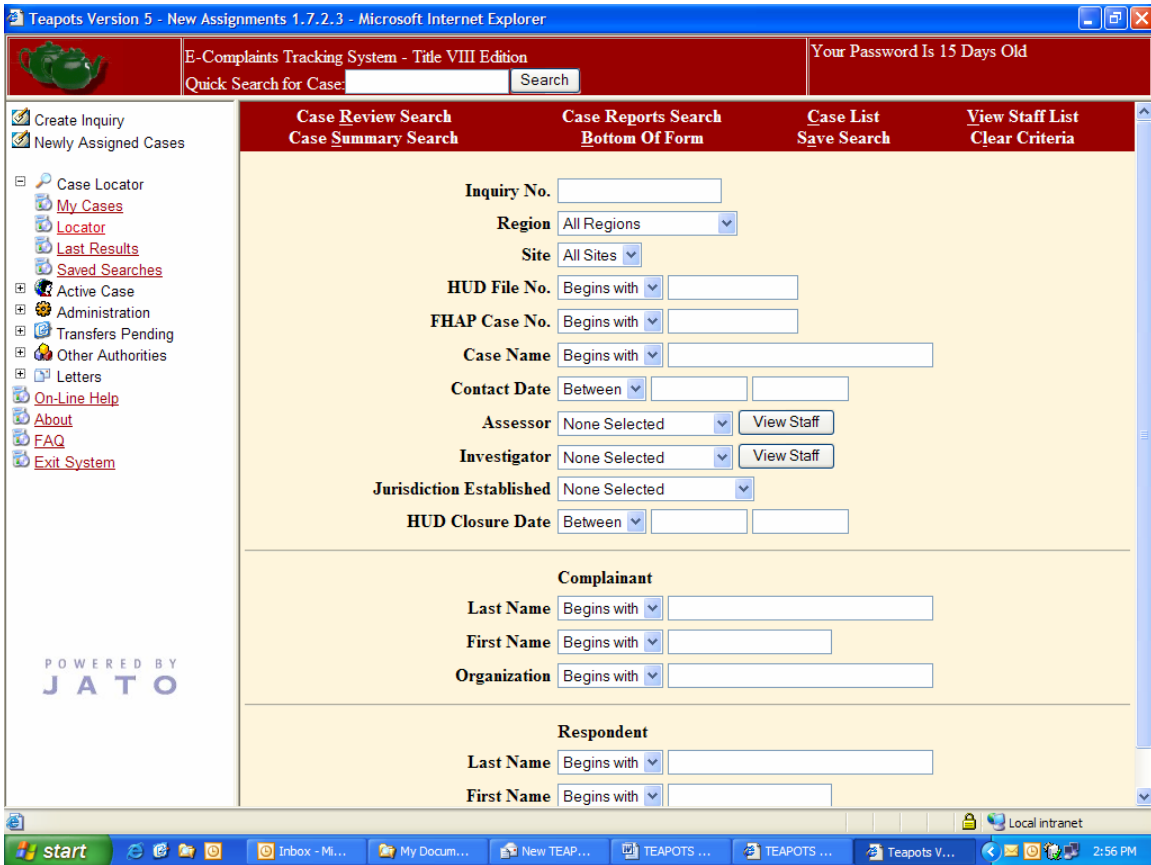
The new system has two new options in addition to the Case Review Search (at the top of the Locator screen). The Case Review Search will take you straight into the case if the case is unique, otherwise it will return a list of cases from which you can select the one you want.
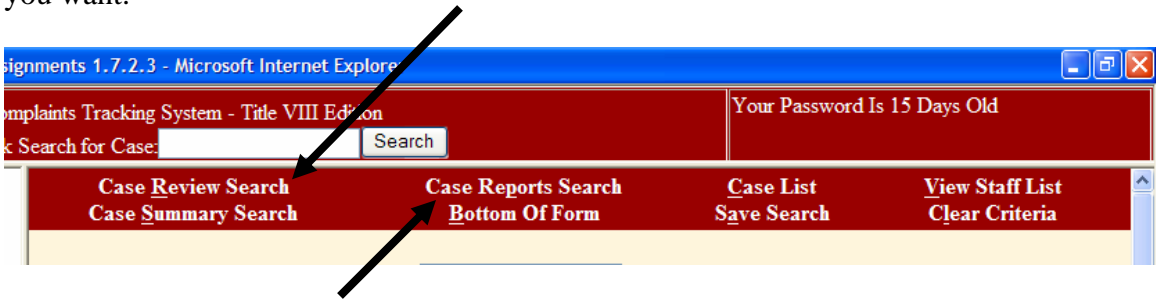

The new Case Reports Search will take you straight to the Case Reports screen. This is a quicker way to run one of the reports. **This will not bring up the case in edit mode so you could be working in a different case and still call up a report.**
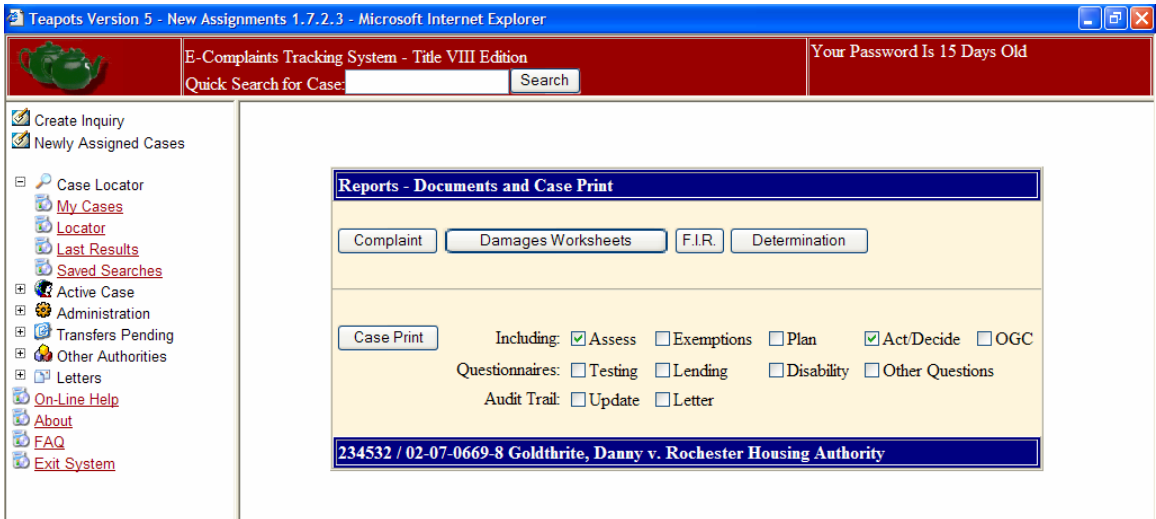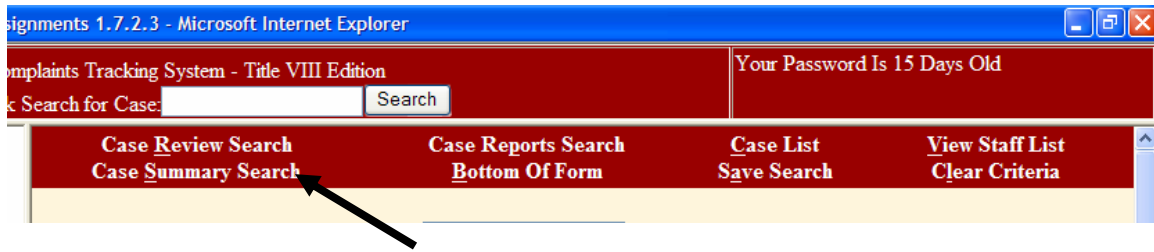
Another new feature is the Case Summary Search at the top of the Locator screen. This is a short Case Print that only lists key facts about the case. This is a quick way to find a closure date or the investigator's name. From the Case Summary you can go into the Case Review by clicking on Case Review in the upper left corner of the Case Summary.
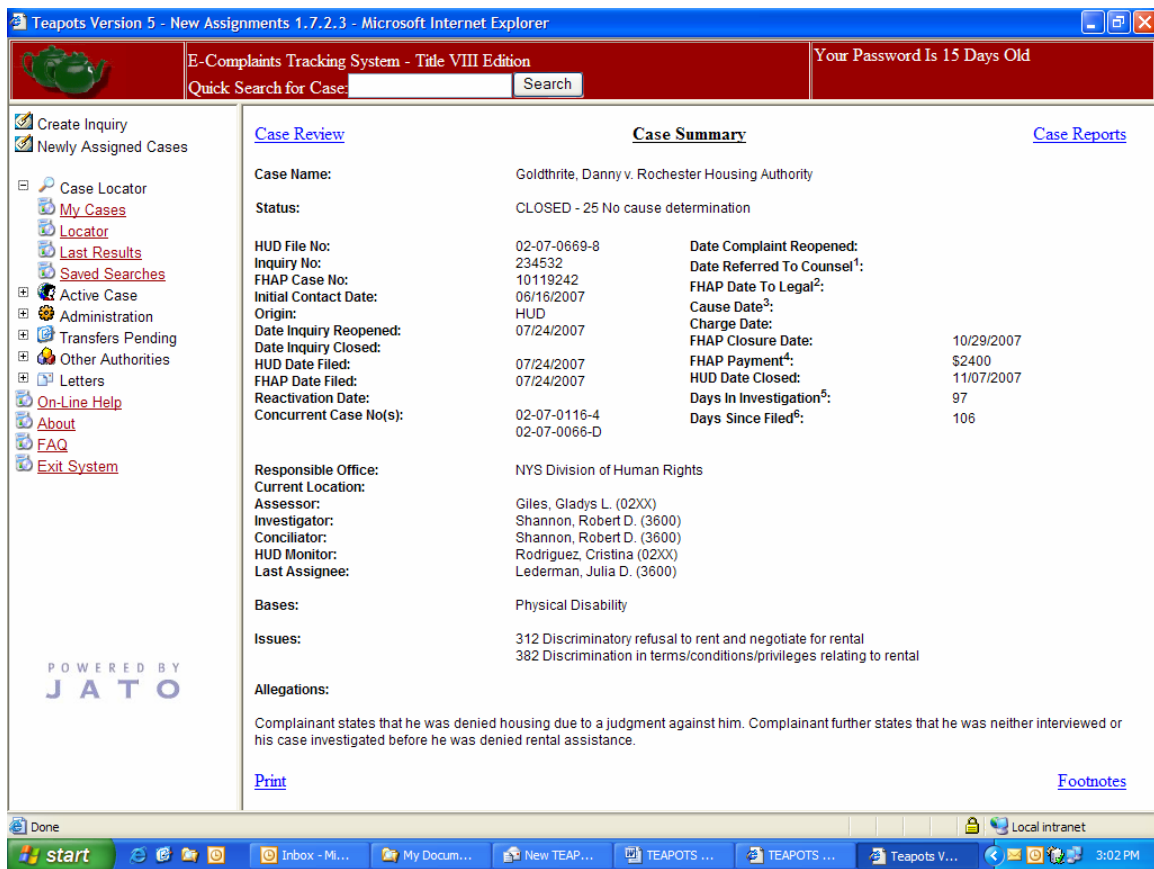
If you use the quick search or the Locator and the Case Review Search and you select a unique case, you will be put on the Intake screen for that case.

If Active Case is expanded on the left-hand menu (and the default is for it to be expanded when you are in a case), all of the standard choices for navigating around a case are below it. These are mostly unchanged. You will see the Save Changes button at the top of the screens instead of along the left.

This should be enough to get you started. **One last important point is that if you exit the system, any case you were working on will be checked in.**

How do I exit a case?

Unlike the old version of TEAPOTS, you can exit by clicking on Exit System at the bottom of the Main Menu.
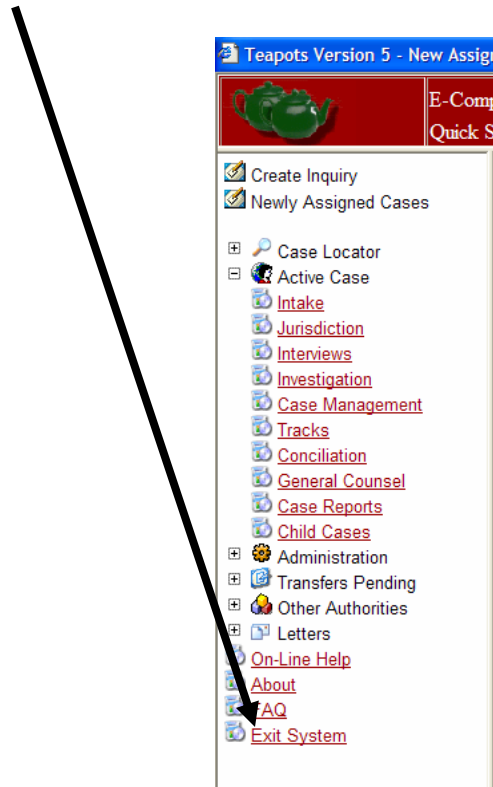
Your active case will be checked in automatically when you exit the system. To exit a case while still in the system, click on the Exit Case button at the top of the Intake, Jurisdiction, etc. screens.

How do I change my password?

The new system will require you to change your password the first time you login, but if you want to otherwise change your password, expand the Administration option in the menu on the left and select Change Password from the list. Again, your password must be at least 8 characters including at least one upper-case letter, at least one number and one symbol (!@#$%^&*()_-+=\/?:;<>~`).

How do I get my password reset if it is not working?

A System Administrator in your office can reset your password by expanding the Administration option on the left and selecting Staff Information. The System Administrator can find a user by clicking on a letter to get a list of users ordered by last name, or he or she could type some part of the user's name in the field at the top of the screen. Note that while the system can search for users' last or first names, the names were entered last, comma, first so if you type in a name first name followed by last name it will not find it so **smith, bob** would work but **bob smith** would not.

The System Administrator can select the correct user from the list and type in a new password on the Staff Member Information screen.

How do I create a new Inquiry?

The Create Inquiry option on the left takes you to the Create Inquiry screen. This is very similar to the old system, but now Case Issue and Violation City are required fields.
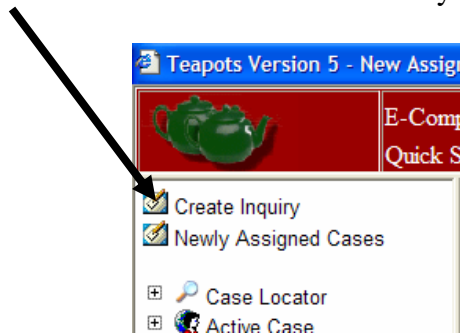
If you do not want to save the information and create an inquiry, just click on one of the other options on the left, even Create Inquiry, to go somewhere else in TEAPOTS. If you do not click on Save Inquiry on this screen, the information you typed in will be erased.

New Features

Longer Periods between Required Password Changes

Now you only have to change your password once every 90 days instead of once every 21 days. There will not be a warning that you need to change your password, but in the upper right-hand corner of the screen the age of your password is displayed so you can reset it when it gets close to 90 days old.

New Password Requirements

To make the system more secure, you now need at least 8 characters with at least one upper-case letter, one symbol (!@#$%^&*()_-+=\/?:;<>~`) and one number.

Ability to Copy Quotation Marks from WORD

The new TEAPOTS recognizes the Smart quotes and apostrophes from Microsoft Word and will not replace them with boxes in your TEAPOTS documents.

System Administrators Can Un-file Cases

Now System Administrators do not have to contact Headquarters to remove the jurisdiction on (un-file) a case. This will remove the HUD case number returning a complaint to an inquiry. To do this a System Administrator expands the Administrator options in the Main Menu and selects Remove Jurisdiction. The System Administrator will be able to search for a case and the case, or a list of cases, will be presented in a list and jurisdiction can be removed by clicking the Remove Jurisdiction button beside the case. The System Administrator will have to confirm the jurisdiction removal for it to be done.
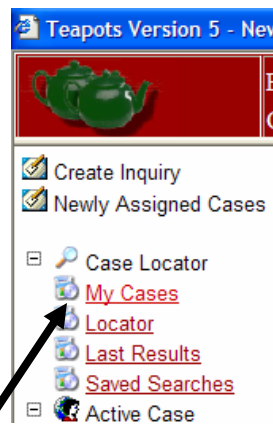
Quick Search

At the top of the TEAPOTS screen there will always be a field where you can search by Inquiry Number, HUD File Number or FHAP Case Number.

My Cases
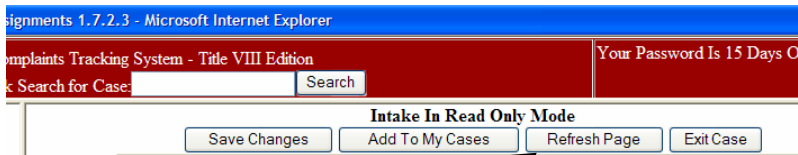
Any time you are in a case, you can click on the Add To My Cases button at the top of many screens to add that case (or inquiry) to a My Cases list.

This list that can be accessed by clicking on My Cases found beneath the Case Locator option on the left side of the screen. This gives you quick access to cases that you are working with.

Any number of people can have the same case in their My Cases list, but only one can have it as their active case at any time. You can remove a case from the list by clicking on Remove on the right side of the list.

Locator

This is a replacement for the Case Review Query feature from the old TEAPOTS, except now the respondent and complainant searches are on the same page. There are also options at the top of the Locator screen to go into the Case Summary screen to see a shorter version of a case print or you can go directly to Case Reports if you just want to call up a report for a case. Note that neither of these new options puts you into the case so you can be working in one case and see the Case Summary of another.

Be careful because criteria are not cleared from the Locator until you exit the program or hit Clear Criteria at the top of the screen. This means that if you were looking for cases with a complainant with the last name of Smith and then later you use the Locator to

search for cases with a respondent with a last name of Jones you must clear the criteria or you results will be for cases with a complainant named Smith AND a respondent named Jones.

Last Results

If you used the Locator to search for cases with a complainant named Smith which has a few hundred results nationally, you might want to look at cases on the fourth page. Once you have gone to the fourth page and looked at the first case you want to see, you can click on Last Results and be taken back to where you were in you last search i.e. the fourth page of a search for complainants named Smith. This saves you from having to re-enter criteria or to page through to the section of the results you want.

Saved Searches

Some searches you do using the Locator you may do often. In those cases you can save the search by hitting Save Search on the Locator or on the results page. You must give the search a name and it will be listed on the Saved Searches page along with a short summary of the criteria. Saved Searches can also be removed from this list by clicking on remove on the right side of the listing.

Case Summary Report

This is a new report that shows key information about a case without all of the text fields of a Case Print. A Case Summary Report can be accessed even if another user is working in the case. To see the Case Summary Report for a case, click on Case Summary Search at the top of the Locator screen after you have entered the criteria.

Case Reports Search

If you just want an FIR or a Case Print, you can use the Case Reports Search option at the top of the Locator screen to go straight to the Case Print screen. In combination with the Case Summary Report and the Last Results feature, it should be much easier to get information about cases quicker.

Newly Assigned Cases

Cases that are assigned to users by their being selected as an assessor, investigator or conciliator, or their being assigned a case on the Case Management screen will first appear here on the assignee's screen. After the user has selected a Newly Assigned Case it will be moved to their My Cases list. If you assign a case to yourself, it will not appear in this list.