

From: WBAR Invitation [mailto:support@wbars.com]
Sent: Tuesday, August 04, 2009 11:56 AM
To: Tim Sovold
Subject: Initial Launch of WBARS!

To: Owners and Managers of Tax Credit Financed Properties

Re: Initial Launch of WBARS!

In the next few days, owner and manager contacts on tax credit financed properties will receive an email from our new Web Based Annual Reporting System (WBARS), issuing each contact a User ID. You will need to use the password recovery, using your ID or email to access the WBARS system. Access is first being released to contacts who were in the Commission's database as the owner or manager contact for one or more tax credit properties. Later this year, other funders will issue access IDs to non-Tax Credit property owners and managers.

There are over 1300 properties now loaded into WBARS. Approximately 694 of those are tax credit properties. WBARS is the new system for entering and submitting annual reports on the web. We would like to receive all 2009 tax credit reports (due January 31, 2010) via WBARS. Reports may be entered directly into the system and used on a daily basis for property management functions, or, may be uploaded from another software system in an XML format.

Information was loaded from your 2008 reports on all tax credit properties. This information is historical and cannot be changed. By next January, you will need to enter all 2009 move-ins and move-outs to bring the system up to date (manually or by upload). Since the system tracks "real-time compliance", as a user, you can see your compliance status with participating funders on a project at any time during the year. However, until you officially "submit" the report, funders will not review a report – unless you ask for our assistance.

User roles in the system are as follows:

WBARS - User Roles

- Contractor/Owner (of a project)
- Project Property Manager (of a project)*
- On-Site Manager (of a project)*

**Note that Projects can have more than one Site and each Site can have a different On-Site Manager and/or a different Project Property Manager.*

Contractor/Owner

Funders have already set up the Contractor/Owner for each of the 1300 projects in the system. This can only be set by funders.

The Contractor/Owner is responsible for submitting reports to the funder level after they have been submitted to the Contractor /Owner by the Project Property Manager. The person who submits the report for the Owner must be authorized to do so and verify that they have that authority. For the Commission, we typically must have an original corporate resolution in our files that authorizes this person to submit reports on behalf of the ownership entity.

The Contractor/Owner is not responsible for **or able to** add to or edit Table 1-4 records as this is a Property Manager function. Owners who need to also fill out or edit Table 1-4 will need to set themselves up as the Contractor Owner **and** Project Property Manager for a project.

Organization Type

Funder Contractor / Owner Project Property Manager

Project Property Manager

If an Organization is configured as a "Project Property Manager" then it can be selected as the Property Manager for a given Project. Any contact in that PM organization can be selected as the Project Property Manager contact. When this button is selected for a contact, that person has the ability to edit Table 1-4 for a project, and to submit the reports to the Contractor/Owner level. Administrators of a PM organization and funder contacts can set this authority for a property.

Organization Type

Funder Contractor / Owner Project Property Manager

The Project Property Manager is responsible for submitting reports to the Contractor/Owner and for maintaining Table-1-4 records. Funders have already set up the Project Property Manager for each of the 1300 projects in the system. This can be set by funders or by the Contractor/Owner. **If the Contractor/Owner changes the PM for a project, an automatic email is sent to all funders of that project.**

On-Site Manager

Project Property Managers set up On-Site Managers in the system. The On-Site Manager selection is **optional** but if included this person is responsible for maintaining Table1 records and is responsible for submitting reports to the Project Property Manager.

Property Manager Administrators can change the selected On-Site Manager.

Organization Administrator
 On-Site Manager
 Able to Submit Reports to next level (On-site -> Project Property Manager -> Contractor / Owner -> Funder)

Organization Administrator

The Organization Administrator is the only person who has the ability to check boxes for contacts in the system. Each organization (Contractor/Owners and Property Management Orgs) needs to assign one or two staff to be an "Administrator". This is the only person in the organization who has the ability to add/delete their staff in WBARS and to check authorization level boxes for staff; including the ability to submit reports forward.

Note: For this initial launch, by default, all owner and management contacts in our tax credit database have been given Organization Administrator rights. After you decide who should be your organization's Administrator, that person should deselect the Org Admin authority button for all other users.

Questions?

Please contact me or any of my staff with any questions you may have. There is also a "Contact Us" button on the WBARS home page at WBARS.com that will be regularly monitored by our staff and staff from participating funders. Additional information on WBARS implementation and future training dates can be found at <http://www.wshfc.org/managers/wbars.htm>.

Thank you and Welcome to WBARS!

*Tim Sovold
Director, Compliance & Preservation
Washington State Housing Finance Commission*