Utility Allowance information in WBARS

We recently revised the submittal process for WBARS so that no projects can submit a Table 1 report to the Owner level or Funder level if the project is missing utility allowance information. If you try to submit and WBARS gives you a message that tells you that utility allowance information is missing, please do the following:

1. **Look first on the Site and Buildings page: go into EVERY BIN (Building) to see if there are allowances configured** – if any BIN is missing UAs, you'll need to make entries for all your allowances for each bedroom size and allowance type you use. Any Building where the owner pays all utilities should have "Owner Pays All Utilities" selected and an amount of "zero" entered for each bedroom size.

2. **If UAs are configured for every BIN, make sure that allowances entered cover the entire reporting period.** For example, we found a property that configured UAs beginning as of 4/1/09, but didn't have any UAs entered for the first 3 months of 2009.

3. **If UA configuration for the BINs is correct, go to the Table 1 page and start looking at individual resident records.**** Scroll all the way down a resident screen to see if Utility Allowance Source has been picked (and that it matches the source you entered for your BINs), and that an amount shows up in the Utility Allowance field. If the UA field shows "N/A" or just blank, then there's a problem and the sources weren't configured correctly.

**NOTE: An easy way to check all resident records is to click Excel Export from Table 1, then scroll across the document to the Utility Allowance column. If any field in that column is blank, that's the resident record/unit you need to correct. On the Table 1 page, be sure to click the "Unit Information Year to Date" button before you click on the Excel Export button, or you will not get all the resident records for every unit over the entire reporting period.

UAs are optional for Common Area Units and not required for Market Units. However, if the owner chooses to income qualify households in Common Area Unit(s), please enter the appropriate utility allowance for that unit.

1. Make sure you are on the Site and Buildings page for your property, and scroll all the way down the screen to the Buildings for [Project Name] section.

2. Go into every BIN one by one by clicking on the Edit button (every BIN has its own Edit button to the far right of the screen).

3. In Edit mode, scroll past the list of units to the Utility Allowance section.

4. If a BIN has no UAs configured, the table will just have three rows with the default bedroom size (1) and default allowance source (Energy Consumption Model) showing.

5. If this is the case, you must enter all utility allowances in use in this building during the calendar year. Please carefully review the WBARS **Preliminary Steps** and **Page by Page Instructions** on our website to figure out how to enter your information (http://www.wshfc.org/managers/wbars.htm).

    A. IF YOUR OWNER PAYS ALL UTILITIES: Enter January 1 of the reporting year in the Effective Date field, choose "Owner Pays All Utilities" in the Allowance Source field, and enter 0 (zero) in the Amount field. Type in the specific utilities the owner covers in the Comment field. Be sure to create a separate row for every bedroom size in that BIN.

6. When done entering your information for one building, be sure to click on Save before entering UA information for the next building.

When you are done configuring all allowances for all buildings at the property, you must go into every resident record and choose the correct UA source for the resident and re-save the resident record. To do this, go into the current Table 1 report as follows:

1. Make sure you are on the Site and Buildings page for your property, and scroll down the screen to the Reports by Year section.

2. Under Reports by Year, click on the current underlined year.

3. When the Table 1 page opens up, click on the Unit Information Year to Date button at the top of the screen so you see all resident activity for every unit for the whole year.

4. Begin going into each resident record one by one. In each resident record, click on the Edit key and scroll down to the bottom of the screen to the Monthly Rent Data section.

5. In the Utility Allowance Source field, click on the black arrow to see the drop-down list of UA allowance sources.

6. From the drop-down list, pick the UA source that matches the source that you entered on the Site and Buildings page for this building.

7. After you choose the proper source, the UA amount you specified for that source on the Site and Buildings page will appear in the Utility Allowance field (to the left of the UA Source field).

8. Once you see the UA amount appear in the Utility Allowance field, scroll back up the screen and click on Save to save the record update.

9. Do not choose UA sources for any residents that are living in units you have designed as Common Area units or Market units. Utility allowance information is only required for units designated as Restricted.