WBARS FREQUENTLY ASKED QUESTIONS

Summary

Congratulations, you are the first in the entire nation to be using an on-line system that is used by eight different public funders at city, county and state level, who share information on over 1300 projects with 100,000 affordable housing units. We want an easy-to-work system that will ultimately saves everyone involved time and effort. As with any new system there are bound to be occasional glitches and lots of questions. It is important to keep us informed of any difficulties you experience or suggestions you have for improvement.

We strongly suggest that you access the WBARS section on our website, print out the Preliminary Steps and Page by Page detailed instructions and refer to them as you navigate the system. Here is the link:

http://www.wshfc.org/managers/wbars.htm

Detailed instructions are also on the bottom of each page in WBARS for easy access.

General Issues

Q: What should I do if I experience problems when working in WBARS?

A: If you are experiencing a problem in WBARS it is **extremely** important to be specific when communicating the problem. You may click on "Contact Us" on the WBARS page or e-mail the assigned WSHFC Compliance Officer or Public Funder staff Contact directly. Be sure to include the following in your message:

- Project Name and OID/Contract number.
- Exact page you were on when error/problem occurred. (The page name will be the last one listed in the breadcrumbs at the top of the page under the "Combined Funders' Annual Reporting System" logo. This line starts with "Back Home" when the error/problem occurred (date and exact time is most helpful).
- What specific error message you received and/or what problem you encountered.
- If you know how to take screen shots of what you are seeing onscreen, please include these in your email body or send them as an attachment to the email.

Specific information is essential in helping our staff and technicians to quickly identify and resolve issues.

Q: What should I do if I cannot locate a property?

A: Check to see if you are in the **"My Projects"** view or the **"My Organization's Projects"** view. **"My Projects"** will only show those properties where you have been assigned the Property Manager or On-Site Manager role. **"My Organization's Projects"** will show all properties where your organization is the Owner or Property Management Company.

If a property does not show up in either of these views click on your organization's name at the top of the screen, then click on your name to see what permissions are checked for you. If the **"On-Site Manager"** box is checked for you, but not the "On-Site Manager can see all Projects for the Organization " box, you will only be able to see properties for which you are assigned the On-Site Manager role. If your permissions need to be changed, contact the Organization Administrator for your company.

The Organization Administrator also assigns roles for specific projects (Property Manager and On-Site Manager). If you do not know who your Organization Administrator is, click on the names of individuals in your organization to see who has that box checked. There may be more than one Organization Administrator for your organization.

Q: What should I do if I cannot edit a property?

A: Only those set up for each property in the Property Manager role or the On-site Manager role *with the Table to be edited at their level* have edit rights for that property.

If there is someone in the "On-site Manager" role for a project/property, then the reports start at their level, which allows them to enter all information and submit specific Report Tables to the "Property Manager" level. The Property Manager can then edit the report and submit it to the person in the "Owner" role. The Owner can only **view** the report, **not edit**. After viewing, the Owner can submit reports to funders or un-submit them back to the Property Manager for corrections. After a report is submitted to a funder, it can no longer be edited by anyone at any level. The information is locked as historical data.

Contact the Organization Administrator for your organization if you are not set up in the proper role for a property.

Q: What should I do if I get a **RED** validation box for a unit?

A: **Red** validations only occur when either the household size or income is not entered for a unit. These sometimes appear for a Common Area Unit (CAU) or a Market-rate unit that were uploaded from your 2008 Table 1 Report. You will need to select the unit by clicking on the resident's name, choose **"Edit"** and then select the applicable category from the drop down menu for "Unit Designation." Be sure to enter household size for all unit records, even CAU's and Market units.

Q: What if I notice that the square footage or the number of bedrooms is incorrect?

A: These two categories can only be changed by a funder. If it is a Tax Credit property contact your Compliance Officer with the correct information.

Q: Sometimes when I am in WBARS I have experienced a long waiting period to save or open something.

A: Occasionally there may be a "time out" issue in the system. If it is taking a long time to save your entries you may need to log out and log in again. Saving should not take more than **ten seconds** per page. Opening a new page may take slightly longer, especially when generating Table 1. We made a number of speed optimization changes in late December and throughout January. In most cases, the system should be operating quickly. If not, please send us an email outlining specific issues.

User ID and/or Password

Q: How do I retrieve my User ID and/or Password?

A: Click on **"Forgot User ID or Password"** from the main WBARS screen at www.wbars.com. The system will prompt you for your User ID or E-mail Address. Once you enter one of these, you should get a message stating: *"A password recovery e-mail has been sent for each account associated with this email address."* The e-mail will have your User ID and a link to reset your password. If the link does not allow you to re-set your user ID/password, please forward the recovery email to your Compliance Officer or appropriate funder contact so we can assist you.

Note: make sure that emails from wbars.com are going to your inbox, and are not sent to your spam or junk mail folder.

Submitting Reports

Q: After entering information into WBARS, how do I submit reports?

A: Reports have to be submitted from the On-site Manager (if there is one assigned on a property) to the Property Manager, then from the Property Manager to the Owner, and then the Owner submits the report to the Funders. If you look at your 2009 Table 1 (accessed though the **"Reports by Year,"** section of Sites and Bldgs page, not by using the **"Edit Table 1"** key), there should be a submit button that was turned on 1/1/10. If you don't have the button, then you can look at the site and buildings page for the 2009 report status to see what level the report is currently at and who needs to submit it forward.

In addition, for all WSHFC properties, an original Annual Owner Certification with supporting documentation must be submitted, as outlined in the report request letter WSHFC mailed to you in December, 2009.

Q: What should I do if I am having trouble submitting Table 1?

A: If you cannot submit Table 1 here are the steps to check:

1. Make sure **"Able to Submit Reports"** is checked for each of the contacts involved. To do this:
    - Click on your **Company Name** on the first screen you come to after logging in (Projects Page).
    - Click on the **name of the staff person** to get to the Contact Detail Page.
    - Make sure the bottom box, **"Able to Submit Reports"** has been checked.
      NOTE: *Only someone who is a System Administrator may change these settings.*
2. Find out what level the report is currently at. To do this:
    - go back to the **Projects Page.**
    - click on a **property name** to get to the **Project Details Page**.
    - click on the **name of the site** to get to the **Site and Buildings Page**.
      NOTE: *If there is more than one Site in a Project, the report for each site needs to be submitted separately.*
    - On the line for 2009 in the **"Reports by Year"** section it will indicate the current submission level for each Table. The person assigned to the property at that level will have the Submit button when they access Table 1.
3. Access Table 1 by clicking on the 2009 in the **"Reports by Year"** section and then click on the tab for **Table 1** at the top of the screen.
   NOTE: *The submit button is not available if Table 1 is accessed through the "edit" key on the Projects Page or the "Edit Table 1" key on the Project Details Page.*
4. Click on the **Submit** button to send the report to the next level. The person at that level will need to follow the same steps to submit the report to the next level until it is sent to the Funder.
   NOTE: *Table 1 will submit forward from On-Site Manager to the Property Manager with red validations, but the Property Manager cannot submit it forward with any red validations.*

Utilities

HINT: First and foremost, read the instructions.

Q: I think I have input all activity for 2009. I seem to be stuck on changing the utility allowance for that year. I have chosen Public Housing Authority (Section 8), which is the allowance chart that we use, but nothing comes up for the amount.

A: Property Managers have the authorization to enter the type of utility for the property. The Property Manager needs to set up the utility allowances *by building* on the **"Site and Buildings"** page. The date the allowance was implemented, the allowance source and the amount *need to be entered for each unit type in each building*. Then the corresponding source needs to be selected in each resident record (Table 1 Detail) from the **"Utility Allowance Source"** drop-down screen; the correct allowance will populate based on the information set up for the building. For detailed Utility Allowance instructions, go to http://www.wshfc.org/managers/wbars/utility instructions.htm

Move Outs and Move-Ins

The system does not allow a unit move-out and move-in to happen on the same day. You cannot show the same date for a vacating resident's move-out and the new resident's move-in. Show the move-out on one date and the move-in on the next day or later. If you previously entered move-ins and move-outs on the same day on your 2008 Annual Report, you must change the move-in date for the new (current) Household. You will not be able to move out the current Household or move a new Household in if this change is not made.

Move-Ins Prior to 2000

Any move-ins prior to 2000 will not show income limits at the time of move-in. This column will be blank. This is acceptable.

2010 Data Entry

Users should not be seeing a 2010 Table 1 report screen in WBARS now—until the 2009 Table 1 is submitted to Funder level. This means that you will not be able to enter 2010 move-ins, move-outs, or recerts until the 2009 Table 1 Report is submitted to a funder.

New Features

There are now two new fields on the Table 1 Detail page. We now have two fields for Household Size entitled "Move-In Household Size" and "Current Household Size." If the household size changes after move-in, the Move-In Household Size field should not be changed and will be locked after reports are submitted to funder. Subsequent changes to Household Size are then reflected in the Current Household Size field. We also have a new field called Move-in Restricted Unit Percentage. And there is a field called Move-In Annual Gross Income.

If a Household moved in during 2009, all move-in fields will automatically match the "Current" fields and will be locked upon submission of your 2009 Annual Report to funder level.

However, ***for 2010 only***, we are leaving the move-in fields open for any households that moved in prior to 2009. This is to allow users to update move-in data for future reference on long-term residents/households. After the 2010 report is submitted to funder level, these fields will be locked for ALL households that moved in during 2010 or in any previous year.