PRELIMINARY STEPS TO COMPLETE BEFORE ENTERING RENTAL ACTIVITY IN WBARS

READ THE INSTRUCTIONS

- Before logging into the system, print out the Instructions document (click on the Instructions link on the WBARS homepage) and review it carefully.

UPDATE YOUR PASSWORD

- After receiving your initial WBARS invitation email, go to the WBARS landing page (www.wbars.com), click on the "Forgot Logon ID or Password" link and use your user ID or email address to request a new password.
- If you never received a WBARS invitation email, check with others in your company to see who your WBARS Organization Administrator is; they can create a WBARS account for you.

REVIEW YOUR CONTACT INFORMATION

- After changing your password, log into the system and on the **Projects** page, click on the + sign to the left of your organization's name.
- In the staff list for your organization, click on your name to go to your **Contact** page.
- On your **Contact** page, review your information to make sure it's correct. Edit the page to update any of your contact information. Be sure to hit Save before exiting the page or any changes you made will be lost.
- You can navigate among pages by using the "breadcrumb" links at the top of the screen. Or, you can use the WBARS "Back" button next to the breadcrumb links to get you back to the previous screen.
  - Do not use the forward/backward arrows on your Internet browser to move from screen to screen, as you may receive screen errors.

IF YOU'RE THE WBARS ADMINISTRATOR

- If you are the WBARS Administrator for your organization, go to the **Contact** pages for each of your organization's staff who are using WBARS, and make sure that all staff who need to use the system are listed and that their contact information is correct.
- Also go into the **Organization** page and make sure the information listed for your organization is correct.
- You need to add any staff who are not listed, the funders do not add or update contact information in WBARS; however, if you are having difficulty entering or updating contact information, please contact a funder to assist you.
- Make sure you have set the appropriate permissions for all staff using the system – permissions are listed on the individual **Contact** page for each staff person.
    - If you want to grant a staff person access to WBARS but *do not want them to have any edit rights* in the system, go into the person's **Contact** page and make sure that *none* of the boxes below their name are checked (i.e., Org Admin, Onsite, Submit boxes).
    - If a staff person should have the right to submit reports (including the Org Administrator), make sure you check the **Able to Submit Reports** box on the person's **Contact** page.
- If a staff person no longer should have access to WBARS, you can inactivate them by un-checking the **Active** box on their **Contact** page.

REVIEW PROJECT FUNDER RESTRICTIONS

- On your home page (called the **Projects** page), click the radio button for "My Organization's Projects" and then click the Apply Selection box to see the list of all your agency's properties.
- One by one, go into each of your properties and do the following:
    - Scroll down the Project Details page and click on each funder name under the Monitoring Funders section
    - On the **Funder Settings** page, carefully review all the set-asides and restrictions noted for each funder on your property. If any of the information appears incorrect, contact the specific funder immediately to correct the data.

IMPORTANT: Funder input of set-asides and restrictions is still ongoing. At this time, all tax credit set-asides should be available for review. City of Seattle set-asides should also be entered. King County, Snohomish County, City of Tacoma and Dept. of Commerce are all in various stages of completing this information on their properties. We expect that funders will complete their input by the end of 2009.

REVIEW UNIT INFORMATION PER SITE/BUILDING FOR ALL PROPERTIES

- On the **Projects** page, click on the Project Name of a property.
- In the **Project Detail** page, scroll down and click on each Site Name for the property. Clicking on the Site Name will take you to the **Sites and Buildings** page for that particular site/building.
- On the **Sites and Buildings** page for each site/building, scroll down to the Buildings section, and click on the + sign to the left of the building name.
- Under the Buildings section, do the following:
    - Carefully review the **Unit ID, # BDRMS** and **Area Sq Ft** fields for all the units in each site/building. If any information is missing, or is incorrect, notify one of your funders immediately to correct the data.
    - If you wish, you can add an additional unit name in the **Other ID** field, but it is not required.

- Remember to click Save to save your changes!

CONFIGURE THE UTILITY ALLOWANCES PER SITE/BUILDING FOR ALL PROPERTIES

- On the **Sites and Buildings** page for each site/building at a project, you must configure the **Utility Allowances** section with all the allowances that could be used in that site/building (the UA fields show up under the Units fields in the Building section, described above).
- If you updated your allowance amounts *more than once since January 1, 2009*, be sure to create entries for *all* the UA amounts you have applied to residents this calendar year.
- Funders do not configure the UA section of WBARS. If you do not fully configure your utility allowances, WBARS will not be able to determine if your total rent and utilities exceed the maximum rent level allowed for your units.
- Remember to click Save to save your changes!

NOTE ABOUT PROPERTY AND RESIDENT DATA INITIALLY ENTERED IN WBARS:

The property and resident data in WBARS was loaded from a variety of sources. Property and some resident data was uploaded from two databases: WSHFC and Dept of Commerce. Properties not funded by any of these agencies have been manually entered by other funders (e.g., King County, City of Seattle, City of Tacoma, Snohomish County). King County, City of Seattle, Tacoma and Snohomish properties that do not have tax credits or Commerce funding will have to enter all resident data from scratch, including all rental activity beginning with January 1, 2009.

Existing rental data was primarily uploaded from electronic Table 1 spreadsheets. WSHFC- funded properties had their 2008 data loaded; Commerce-funded properties (with no tax credits) had their 2007 data loaded (if your property *did not* submit an electronic Table 1 report to WSHFC or Commerce, you will have to create all your resident records from scratch). Again, only rental activity starting from January 1, 2009 needs to be entered in WBARS – this includes move-ins, move-outs, transfers, and recertifications.

Note that although most Table 1 information loaded into WBARS, there were some types of information which were not uploaded. You will need to manually configure any units that are designated as HOME units; will need to manually choose a utility allowance source on each unit activity page; and will need to manually fill in the subsidy type and amount fields on a unit activity page if the household is receiving some kind of subsidy (see the full *Instructions* for more information on how to do these things).