

# WBARS 2.0 FUNDER USER QUICK GUIDE

## MAY 2019

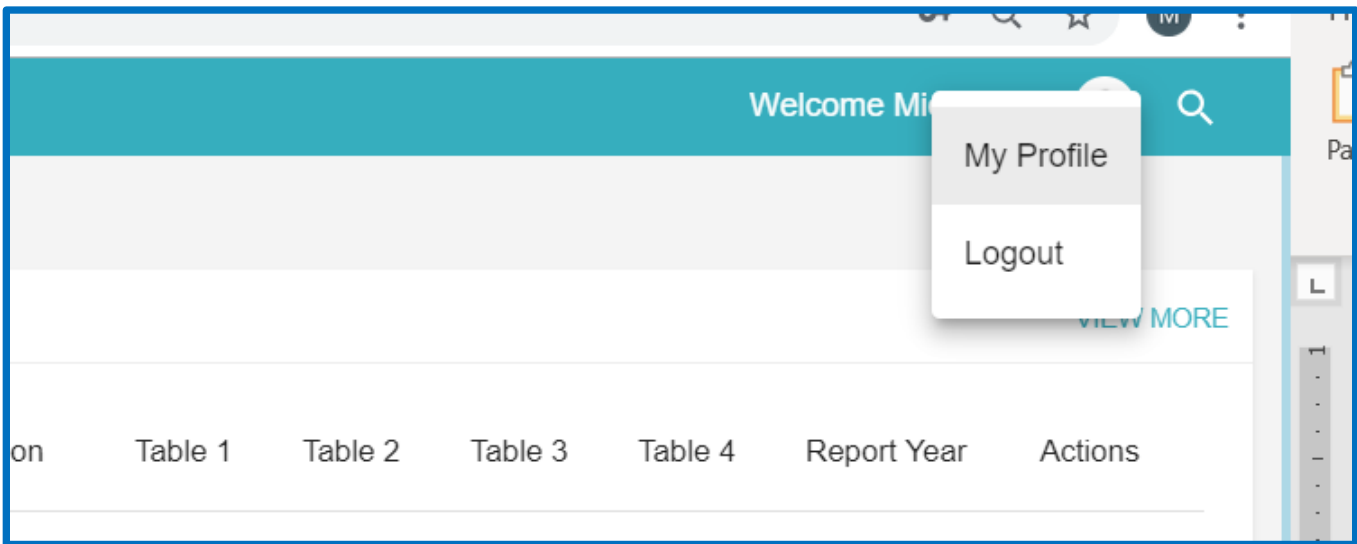
This quick guide goes over the most common functions used by Funder staff users in WBARS. For a more detailed description of all WBARS 2.0 modules and functions, please open the **Help** module in WBARS and review the more comprehensive **User Guides** prepared by our developer and by WSHFC.

## How do I see a list of properties that I monitor?

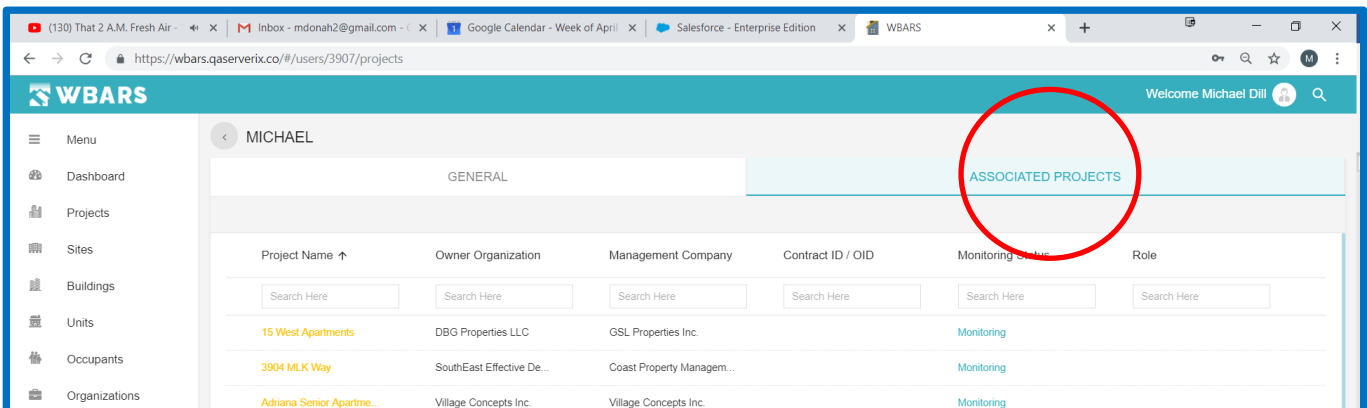
After logging in, click your user icon in the top right corner of the screen:



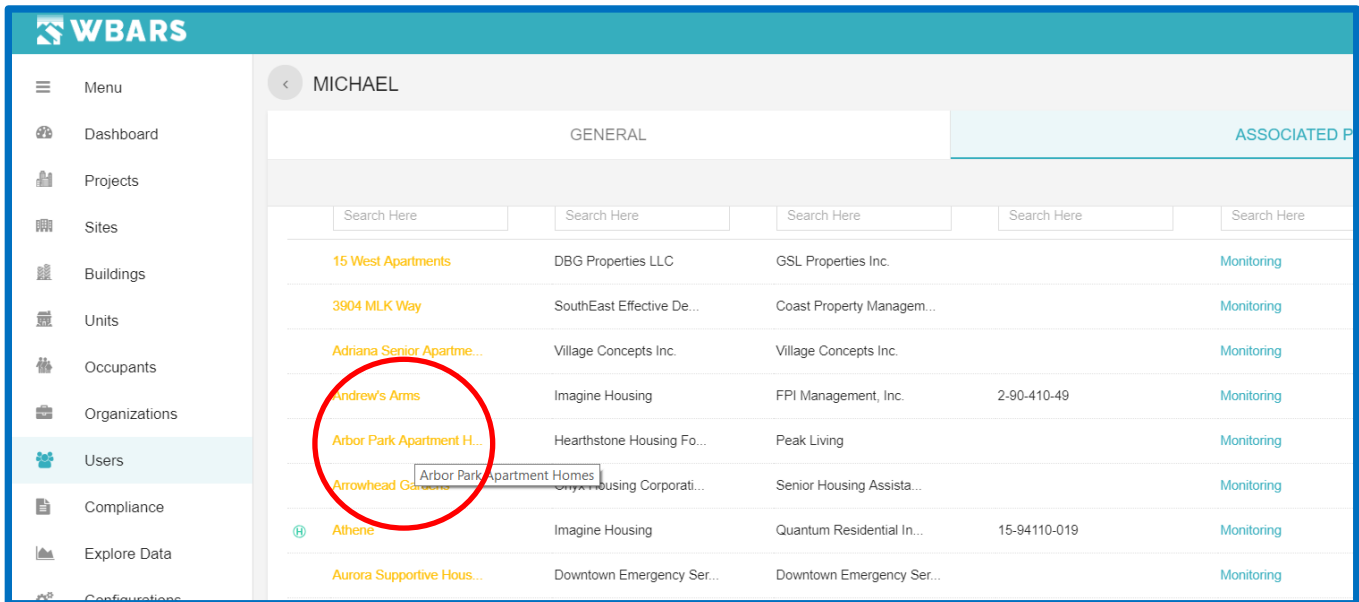
Click on **My Profile** – this will open your user contact record



On your contact record, click the **Associated Projects** tab



Projects where you are named as the Funder contact will be displayed on screen. Click on the **Project Name** to open any project’s detail record:



**NOTE:** If your funder organization has a generalized contact for all their projects (like “Compliance Asset Management”), you will not see a list of properties on your Associated Projects tab, since your name is not noted in the Funder Settings for any of your organization’s projects.

## Help! I need to add/delete a Project/Site/Building/Unit!

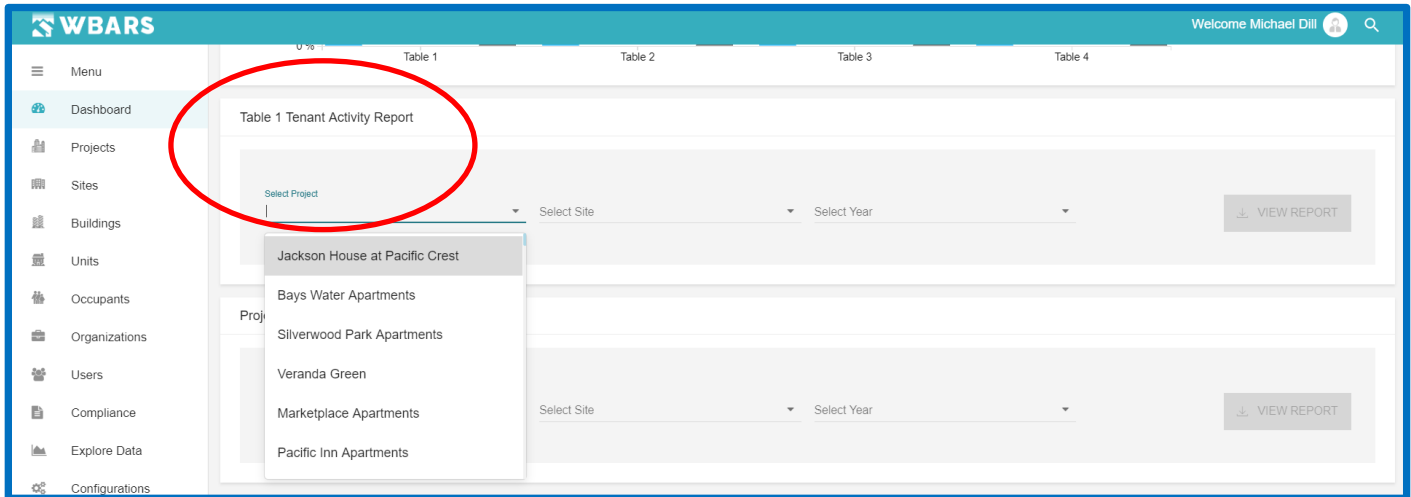


These functions are restricted to the Administrative Funder users of WBARS.

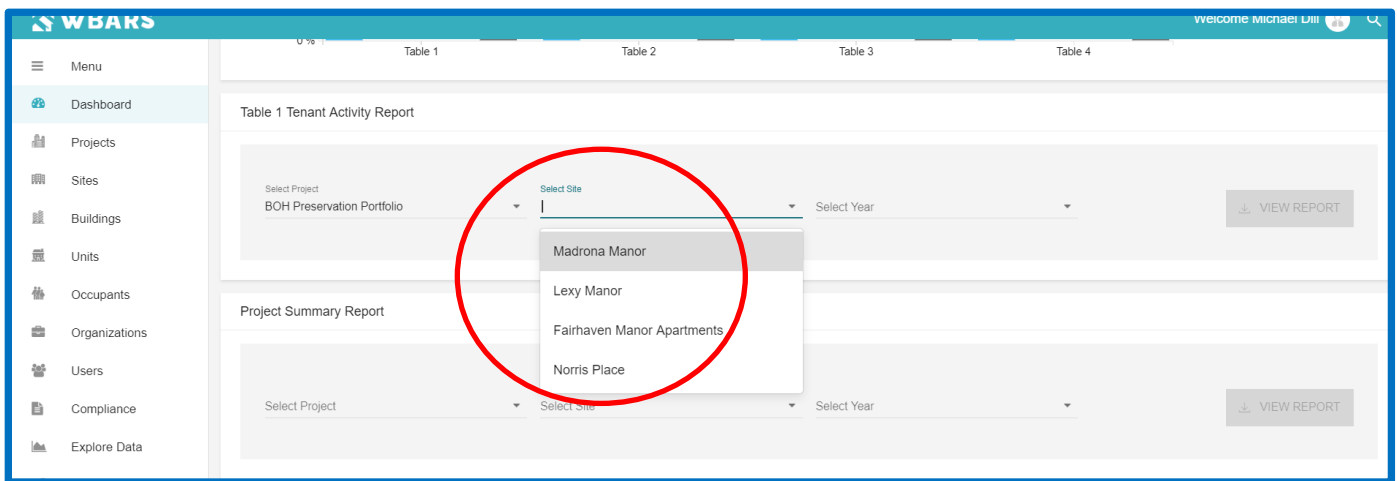
Please contact either Nona White at the Department of Commerce or Melissa Donahue at the Washington State Housing Finance Commission for assistance with adding or deleting projects, sites, buildings or units.

## I want to print a Table 1 report for a project.

Scroll down your Dashboard page to the Table 1 Tenant Activity Report section. In the **Select Project** field, either click the dropdown arrow or start typing a project name in the field to choose the appropriate project:

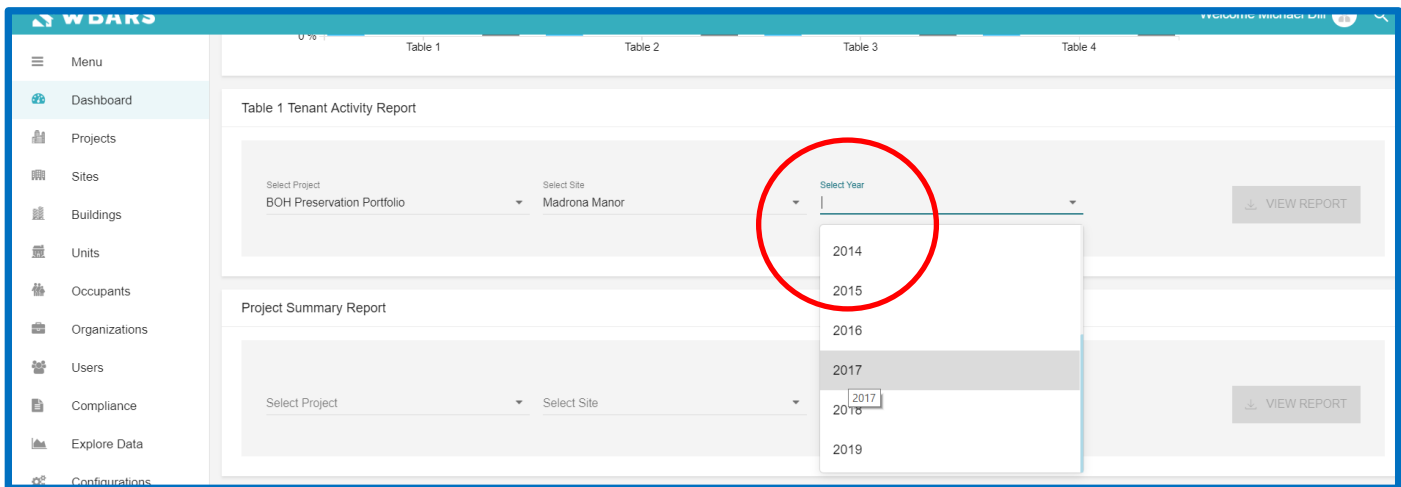


If you wish to see only a certain Site at a project, click the dropdown arrow in the **Select Site** field to choose the specific Site name:

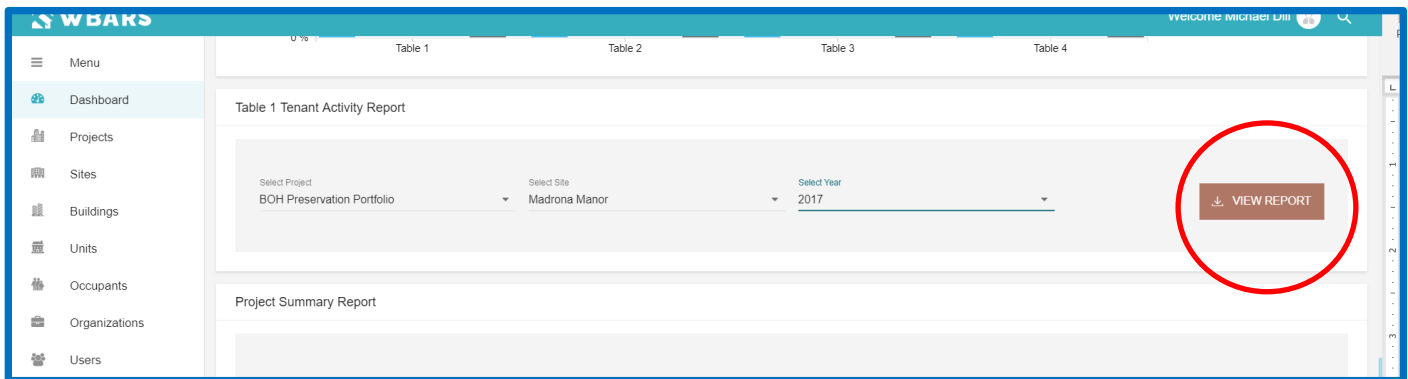


*If you want a Table 1 export that includes all the Sites at a project, leave the Select Site field blank.*

Click the dropdown arrow in the Select Year field to choose the reporting year you want to see data for:



Then click the orange **VIEW REPORT** button to download the Table 1 report. After downloading the report, you can save it to your computer or you can print it out.



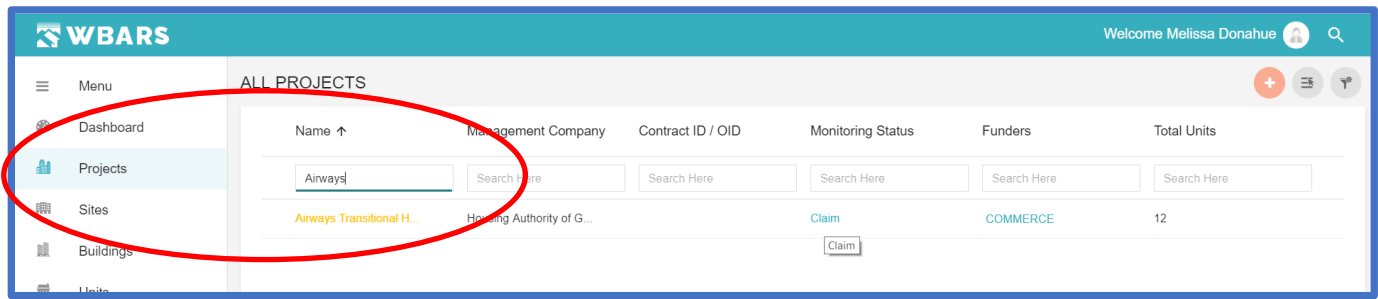
### PLEASE NOTE THE FOLLOWING:

You will be able to download an **Annual Report Summary** export in the Project Summary Report section, using the same process. The report will be available some time soon after we go live.

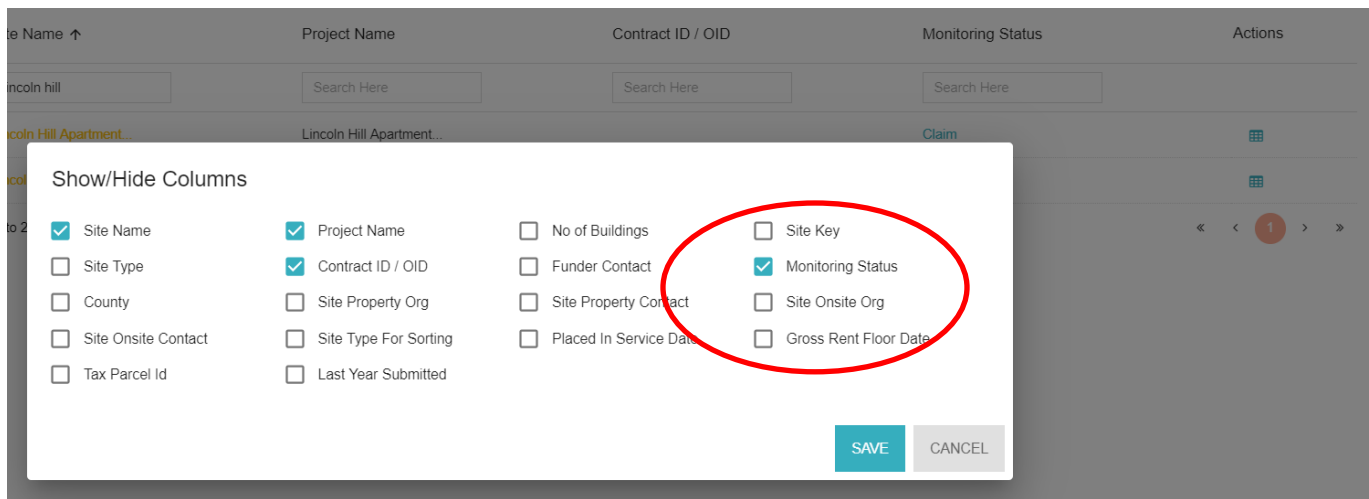
The previously created funder reports (Performance Measures, Submission Status, etc.) will be available on the Funder dashboard some time after we go live. At this time those reports are not available.

# I need to claim a Project/Site, how do I do that?

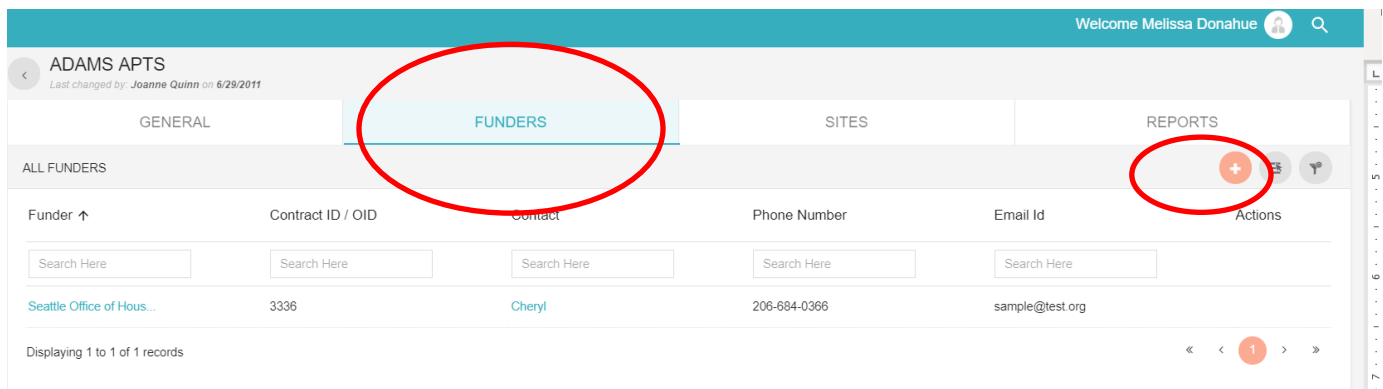
Click on the **Projects** icon, and search for the property you wish to claim in the Project Name column.



Make sure you can see the **Monitoring Status** column on screen. If you can't, click the **Select Columns** icon in the top right corner to make sure Monitoring Status is checked:



Click on the Project name to open the Project record, then click on the **Funders** tab:



Click the orange plus sign icon (shown in previous page screen shot) to create a new funder settings record:

Welcome Melissa Donahue

ADAMS APTS

GENERAL FUNDERS SITES REPORTS

CLAIM PROJECTS

Primary Contact on Project \*  
Melissa Donahue

Subsidy Commitment Text

Project Expiration Date \*  
12/31/2052  
mm/dd/yyyy (e.g 01/01/1991)

Project Type \*  
None

Note

SAVE

Assign the correct staff person or funder contact record in the Primary Contact field, then fill in the other Funder Settings fields as you would have in the old system:

Welcome Melissa Donahue

WSHFC | ADAMS APTS  
Last changed by: Melissa Donahue on 4/22/2019

GENERAL FUNDERS SITES REPORTS

Primary Contact on Project \*  
Lanakay Lipp

Subsidy Commitment Text  
Added credits in 2019

Project Expiration Date \*  
12/31/2052  
mm/dd/yyyy (e.g 01/01/1991)

Project Type \*  
None

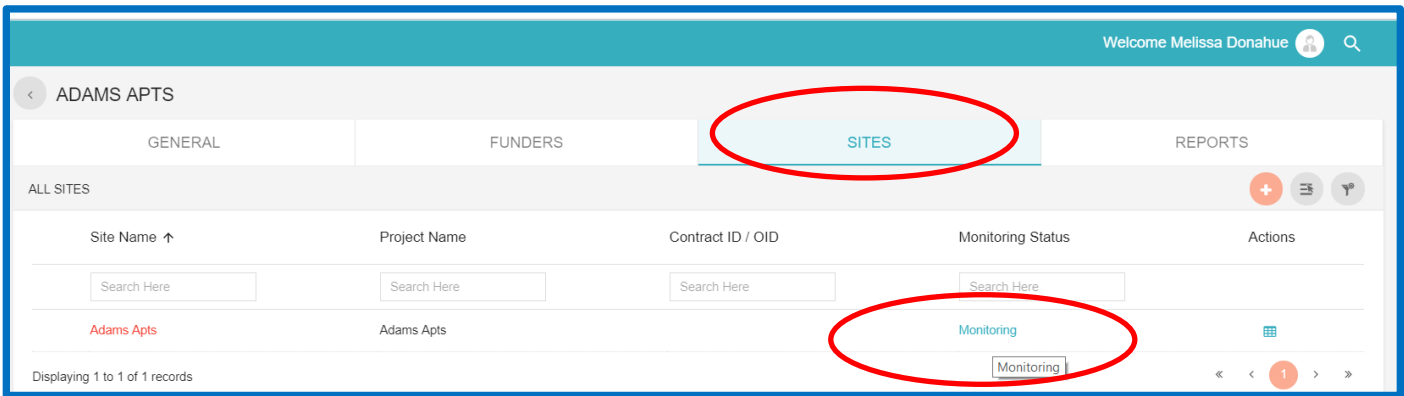
Note  
Came in for rehab in 2019, received 4% allocation.

**Reporting Forms**

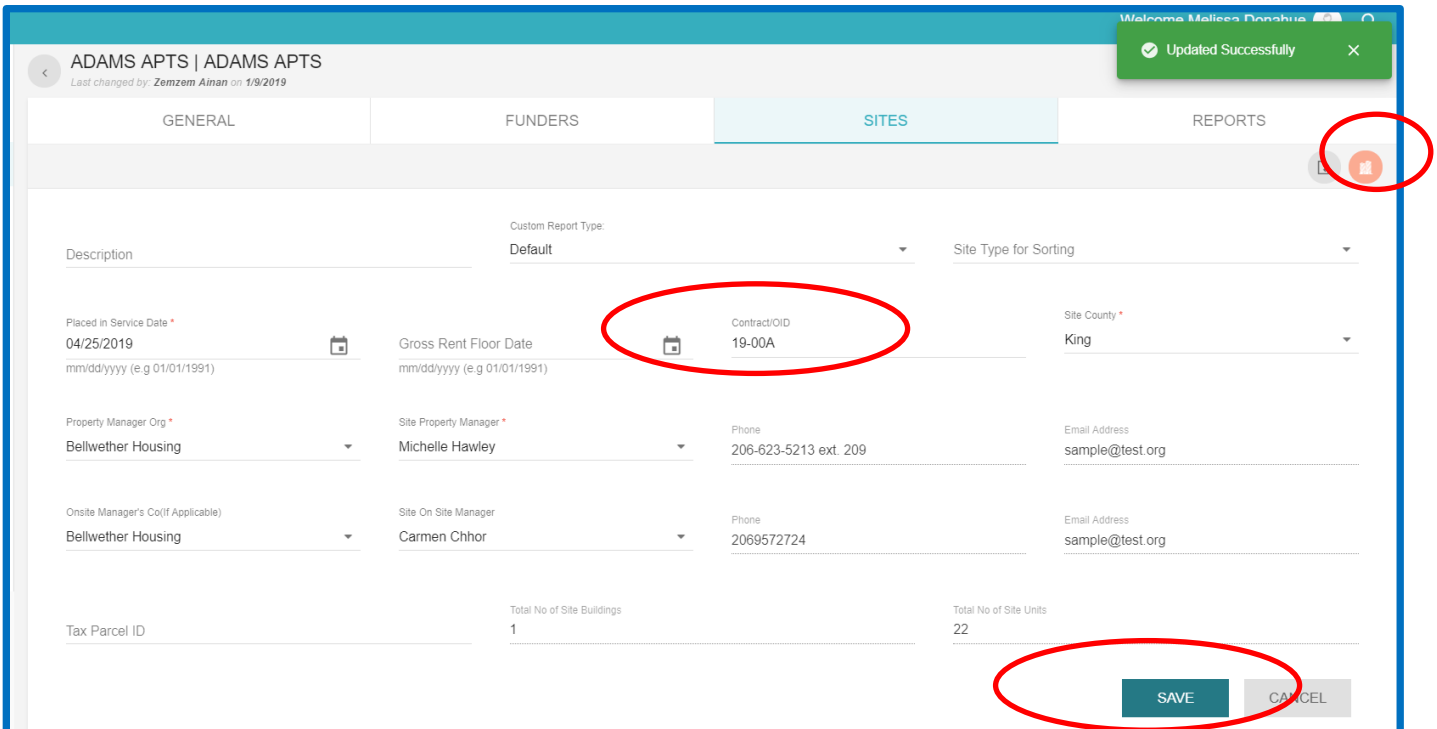
Site : Adams Apts	Site Key : 17340	Contract ID/OID :	First Reporting Year * 2019
Report Table	2019		2020
Table 1	<input checked="" type="checkbox"/> 1/30/2020		<input checked="" type="checkbox"/> 1/30/2021
Table 2	N/A		N/A

When done creating the funding specifications for your agency, click **Save**.

Now click back on the **Sites** tab, and click “Monitoring” to the right of the Site name(s) you wish to claim, working on one site at a time:



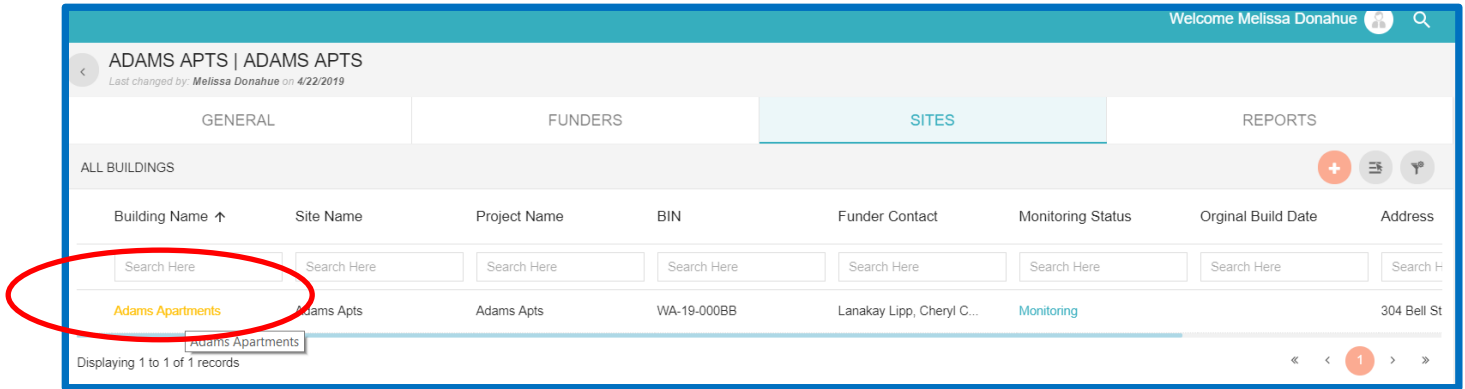
On the **Site** detail page, update or fill in any of the fields as needed – be sure to put in your funding contract number for the project in the Contract/OID field. Then click **Save**:



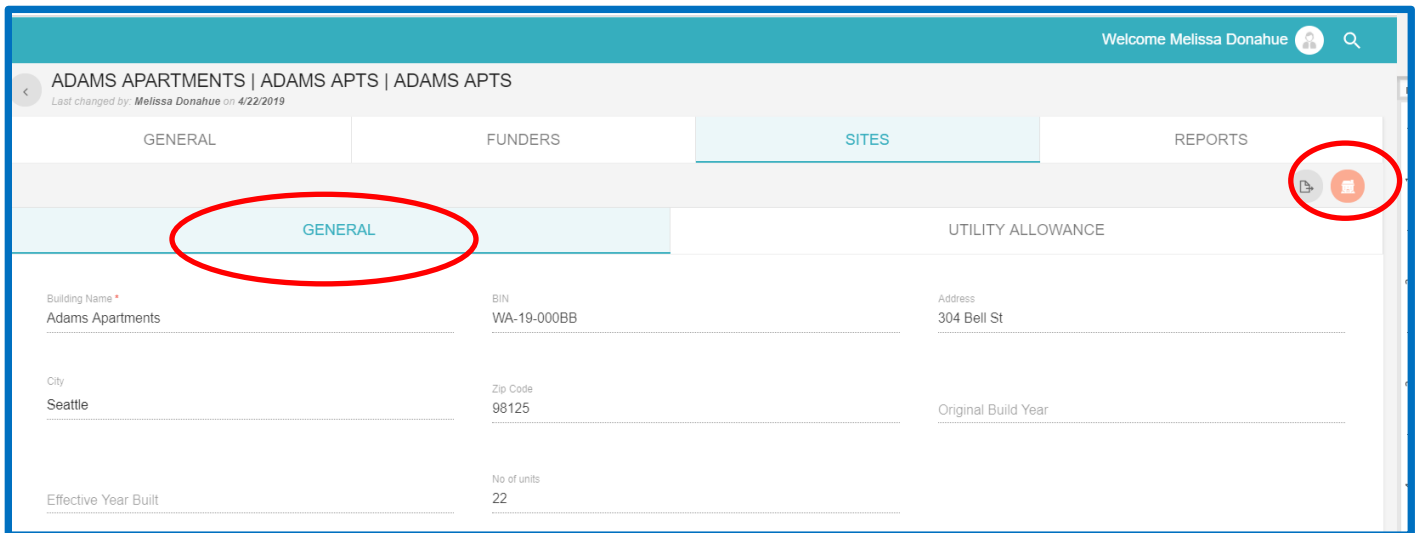
To fill in any funder-specific information for each building, click on the orange **Building** list icon in the top right corner (shown in screen shot above).



On the Building list view page, click on each building record to add any building-related information:



On the building detail page, you can add/edit information like BINs, Original/Effective Year Built, or address info:

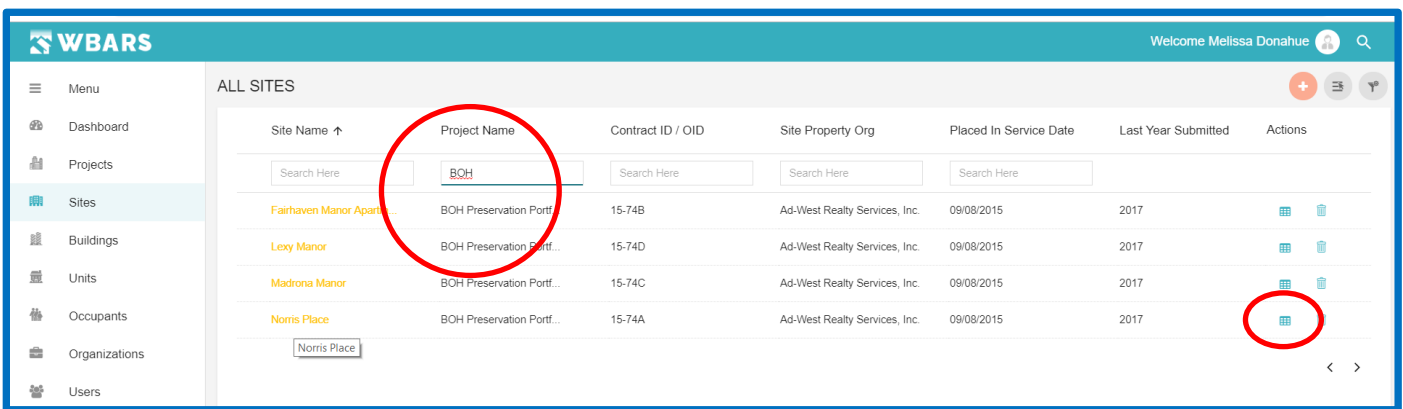
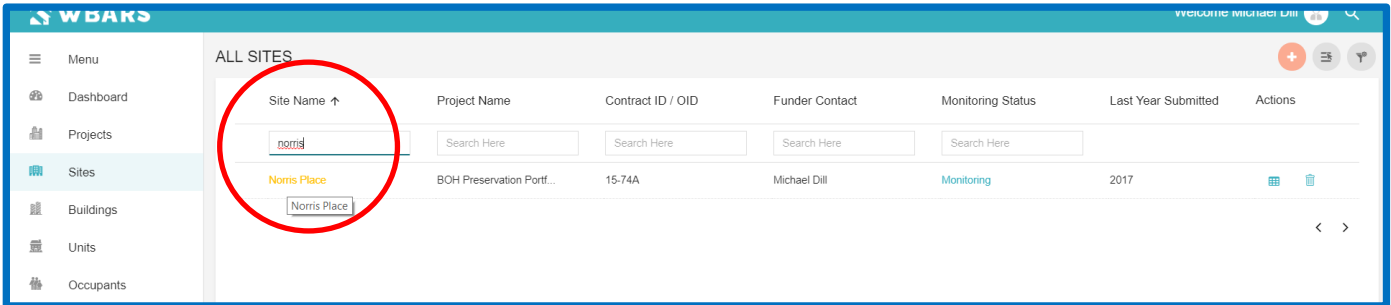


To view the data for the units in that building, click on the orange **Units** list icon in the upper right corner (shown in the screen shot above).

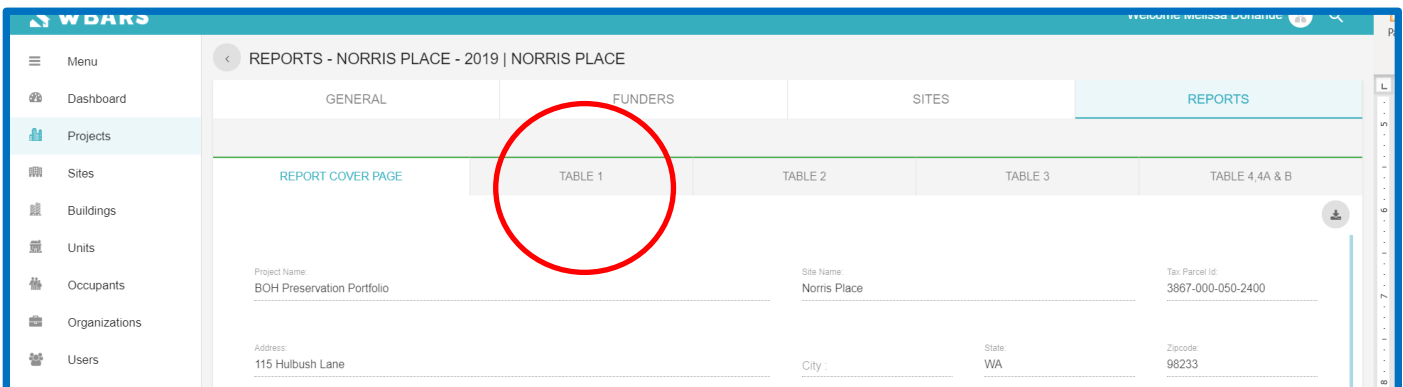
**NOTE:** If you think any of the Site, Building or Unit data is incorrect, **do not try to change it**. Contact the Commission or the Department of Commerce to discuss and get clarification on the physical property data. If any changes need to be made, the Commission or Commerce will take care of them.

# I want to view the current year Table 1 report onscreen - how do I change the columns I see?

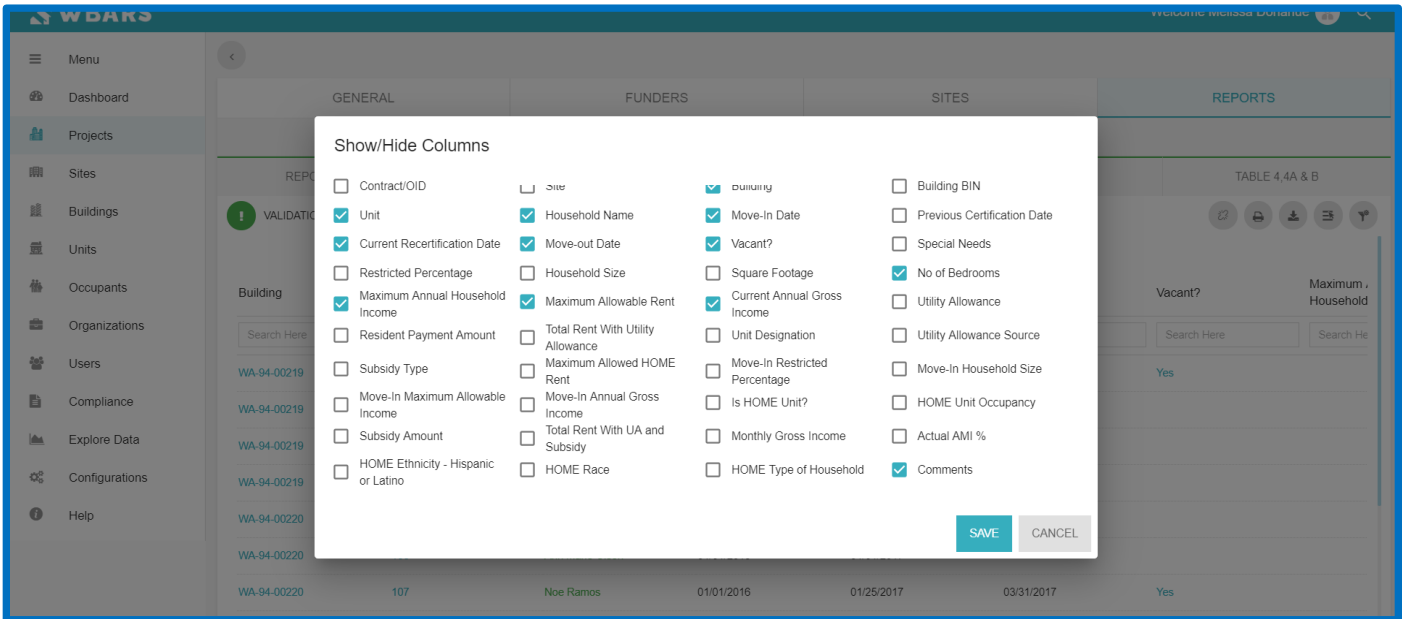
The quickest way to access the current year Table 1 report is by clicking the **Sites** module, then typing in a Site name in the **Site Name** field (or a Project name in the **Project Name** field):



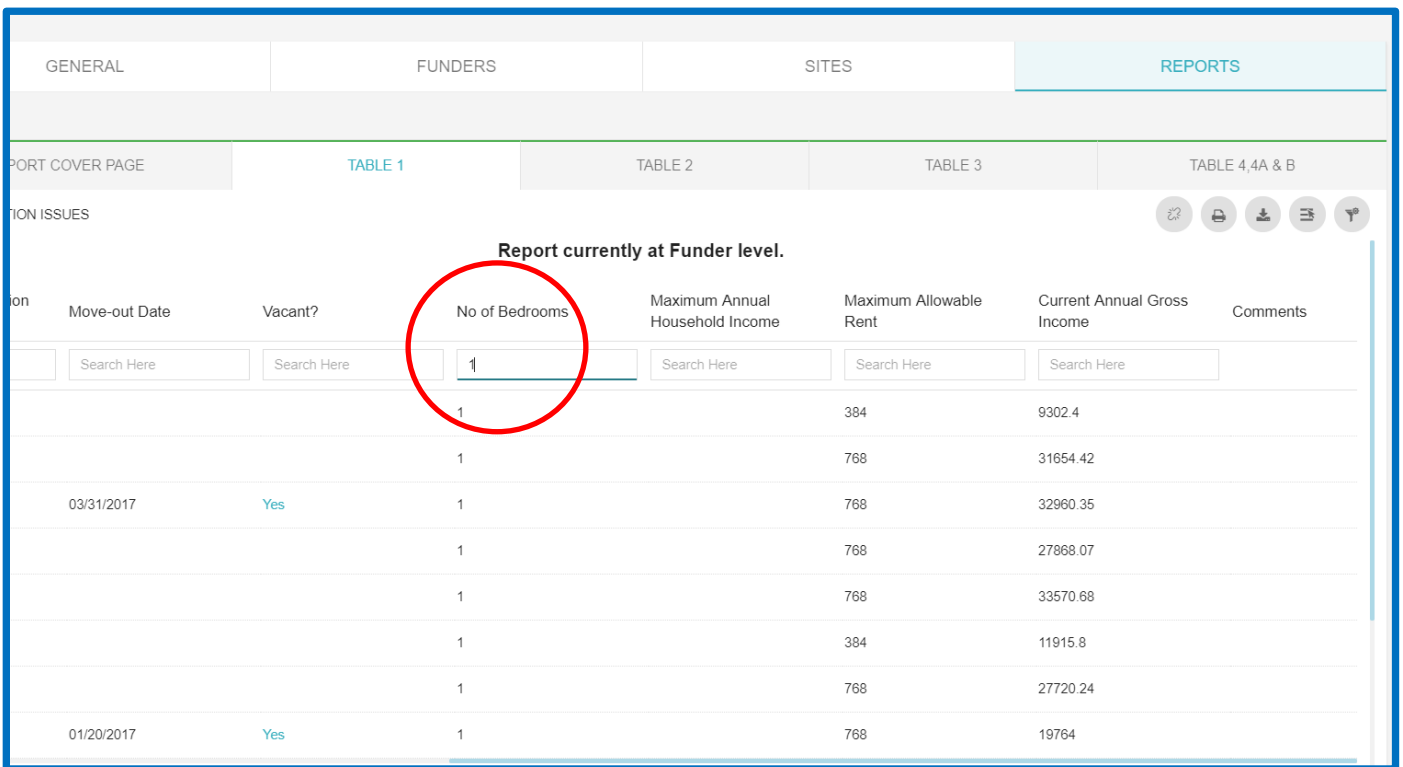
When WBARS returns your Site record, click on the grid icon under the **Actions** column at the far right, this will jump you to the current reporting year's Table report tabs (see icon in screen shot above). Click on the Table 1 tab:



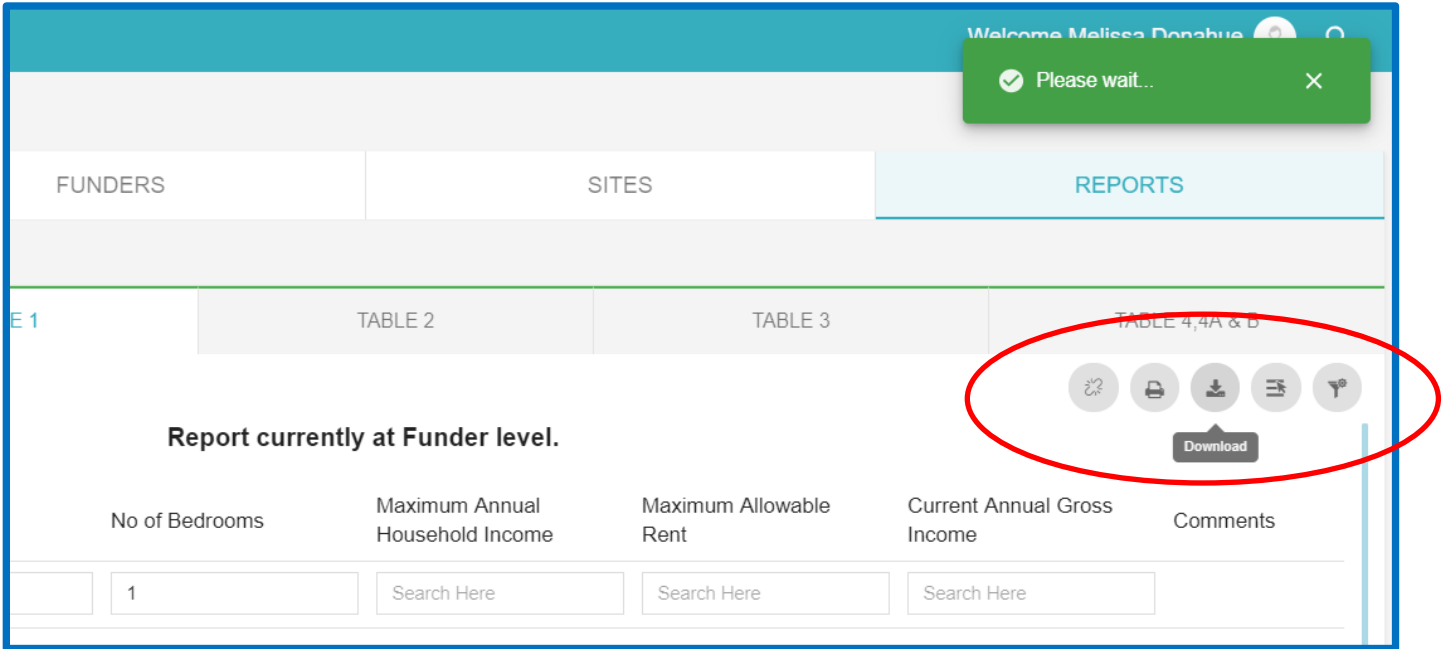
At the top right of the table, click the **Select Column** icon and click on the fields you wish to see onscreen. Unclick any columns you wish to hide from view. Click **SAVE** to save your edits. As in the previous system, you'll have to scroll back and forth onscreen to view all the columns displayed.



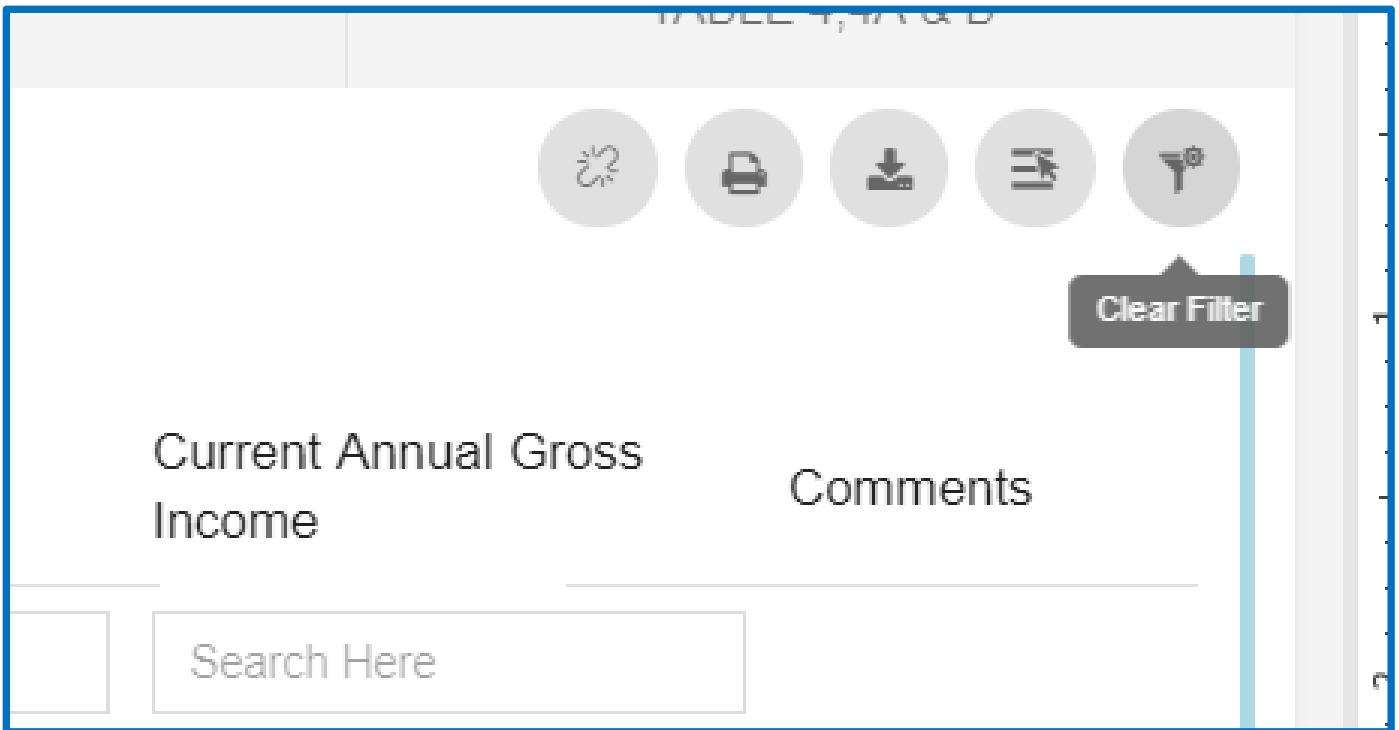
You can also filter for specific records by typing search criteria in the search fields under any Column header:



If you want to download the report, click on the Download icon to the left of the Selection Column icon in the top right corner.



If you want to clear your search criteria and see all the Table 1 records, click the **Clear Filter** icon to the right of the **Select Column** icon:



## I need to unsubmit a Table 1/2/3/4 report, how do I do that?

**DO NOT UNSUBMIT ANY REPORT WITHOUT FIRST CHECKING WITH THE PROJECT'S OTHER ASSOCIATED FUNDERS.** Other funders may be in the process of reviewing the reports and unsubmitting the reports back to Owner level could cause them inconvenience or interfere with other submitted data.

In general, funder staff are discouraged from unsubmitting Table 1 in WBARS. The only time a funder should consider unsubmitting Table 1 is when there is data missing from the report. Please do not ask to unsubmit a report if there are resident record validation issues – the report is meant to be a snapshot of tenant activity during the reporting year and it's important to see the actual state of resident records during that time.

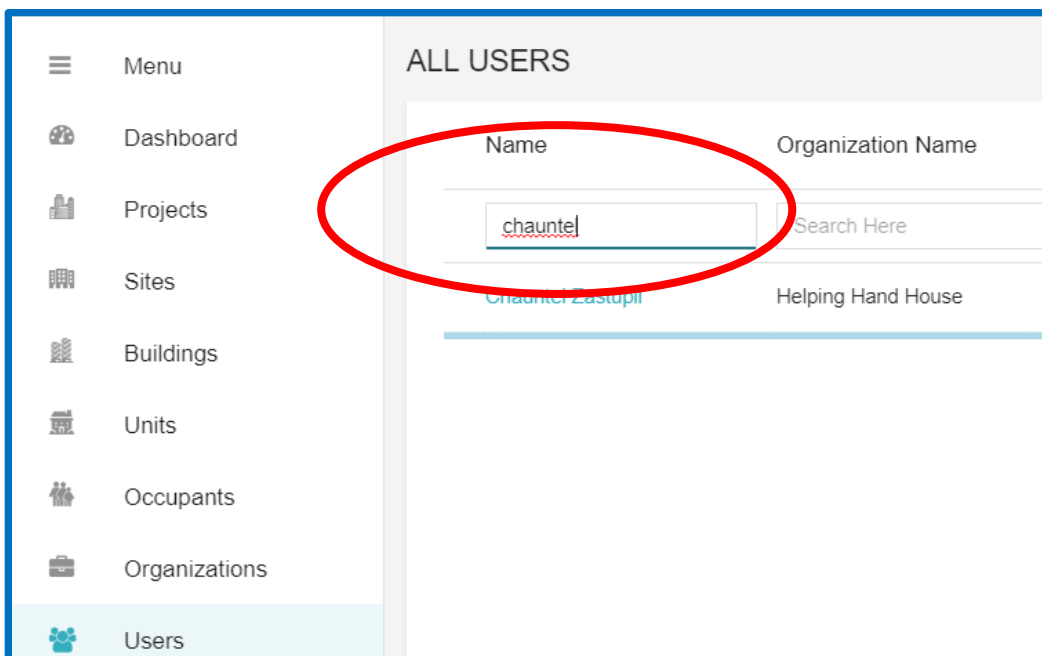
Also note that unsubmitting Table 1 unsubmits Tables 2 and 3 automatically, and that to unsubmit Table 2 or 3, Table 1 must first be unsubmitted. *Again, if you are not the only Funder in a project, please check with your Funder partners before moving forward with an unsubmit!*

## One of my contractors called and needs me to create a new contact record for them, how do I do that?

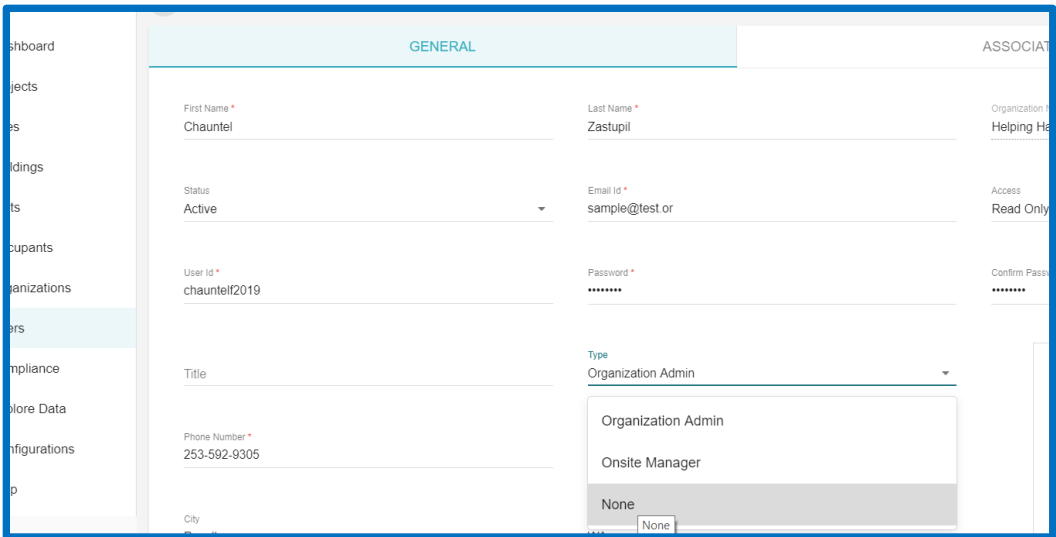
First, ask the contractor if they already checked with their WBARS Organization Administrator to add the contact record. If they say they haven't, refer them to their WBARS OA, who should be able to do this for them.

## What if they say the OA no longer works for their company?

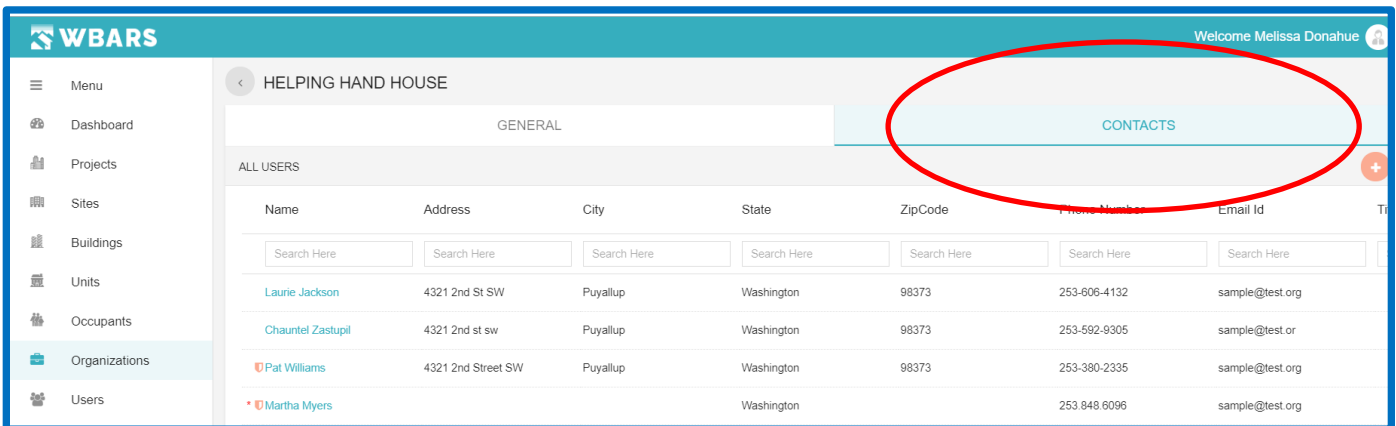
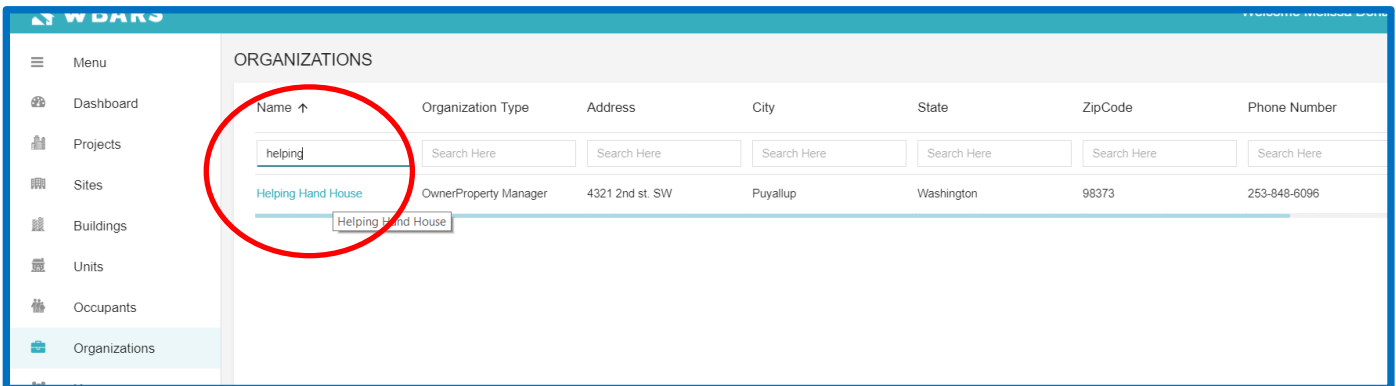
Open the **Users** module in WBARS; type the old user's name in the **Name** field to find their record, then click on their name to open their contact record:



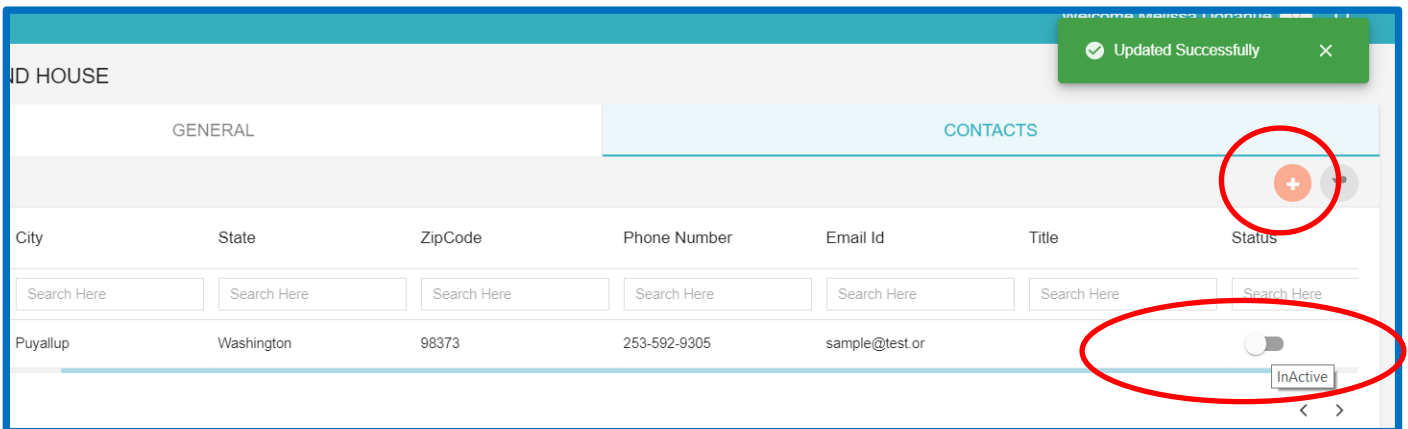
In the user's record, click the dropdown arrow in the Type field, and choose "None", then click SAVE.



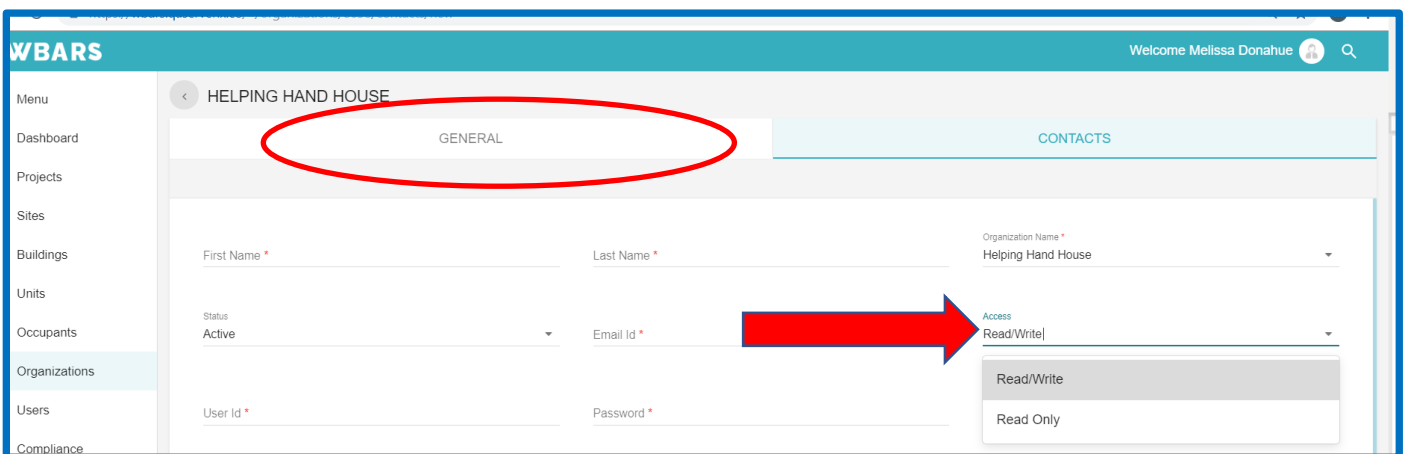
After updating the user record, open the **Organizations** module and search for the Organization's name in the **Name** column. When the org record appears, click on the Name, and in the org detail record, click on the **CONTACTS** tab:



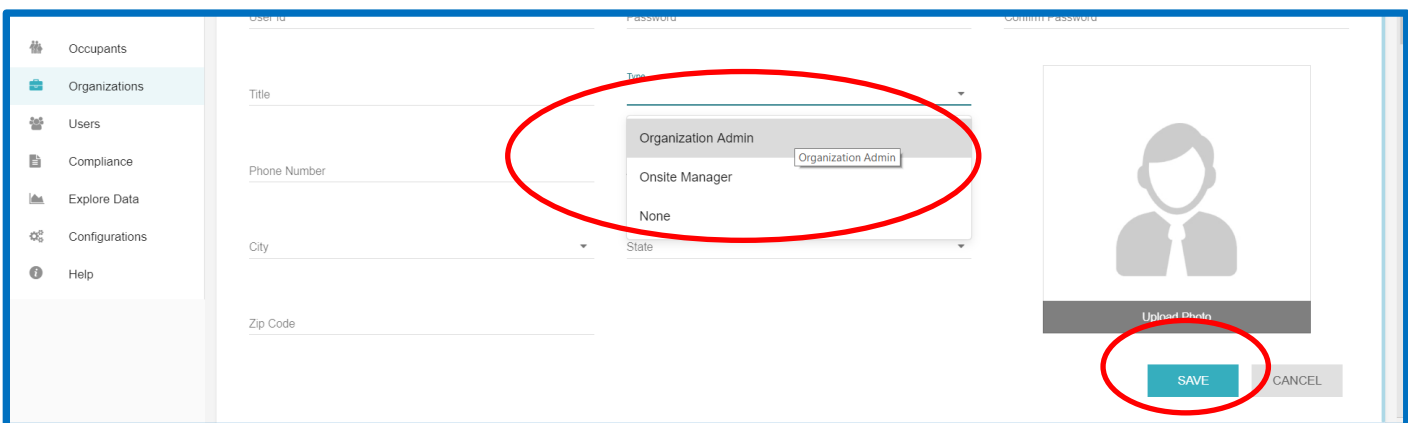
Locate the old user's record and click on the **Status** button to the far right of the person's name. This will inactivate the user. Note that user and organization records cannot be deleted in WBARS, they can only be activated or inactivated:



Now you can create a new user record for your caller's organization. While you are on the **CONTACTS** tab, click the orange plus sign icon (see screen shot shown above) to open a user contact record template and fill in all fields, noting if the person should have read-only access or should have edit rights:



Make sure to designate whether the new user should be an Organization Administrator by clicking the dropdown arrow in the **Type** field to choose OA. Be sure to create a user ID and password for the new user. Click the **SAVE** button at the bottom of the screen:



Email the user with their new user ID and password and let them know they should be sure to update their password the first time they log in to WBARS.

## Got more questions? Need further assistance?



Look in one of the User Guides located in the [Help](#) module!