WBARS FREQUENTLY ASKED QUESTIONS

(Created and Updated by the Washington State Housing Finance Commission)

GENERAL ISSUES

Q: Are there any written instructions for using WBARS?

A. Yes, you can find written instructions for WBARS on the Commission's WBARS web page: http://www.wshfc.org/managers/wbars.htm. Under the **WBARS Instructions** heading, note the **2010 WBARS User Guide** – this document is a comprehensive overview of WBARS and is easy to navigate. Also be sure to review this FAQ document, where we can more easily address emerging issues. There are also other resources, including contact information for all Public Funders, annual report submission information for each Funder, and XML import documentation for users as well as developers.

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, otherwise it takes much longer to solve your problem. You should email your property's Compliance Officer for assistance. If your project does not have tax credits, please contact the appropriate public Funder (contact information for each Funder can be found on the Commission's WBARS webpage, address above).

Be sure to include the following in your message:

- Full Project Name, contract/OID number if known
- If problem involves specific unit – include BIN or building name, unit number and resident name
- 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're seeing on-screen, please include these in your email body or send them as an attachment to the email.

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 as the Property Manager, On-Site Manager, or Owner contact. **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.

An Organization Administrator assigns permissions for each staff contact in WBARS and assigns specific staff to each project at all three levels (Onsite, Property Manager and Owner). 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 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 in a Table and submit each report 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 contact can only ***view*** the report, ***not edit it.*** After viewing, the Owner can submit reports to the Funder level 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. At the Funder level, the information is locked in WBARS 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 resident record?

A: Red validations only occur when either the household size or income is not entered for a resident record. You will need to select the unit by clicking on the resident's name, click the Edit button and then select the applicable category from the drop down menu in the "Unit Designation" field. Be sure to enter household size for all resident records, even CAUs and Markets. Do not worry if your cursor doesn't blink in this field – just make sure you've clicked on the field then enter your data and it will appear.

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

A: These two fields can only be changed by a Funder. If it is a Tax Credit property email your Compliance Officer; otherwise, email the appropriate Funder. Be sure to include the site name, BIN, the unit number, and the appropriate square footage and bedroom size for each unit.

Q: Sometimes when I am in WBARS I experience a long waiting period to save or open a record. Why does this happen?

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 have been making periodic system optimizations. In most cases, the system should be operating quickly. If not, please send your Funder 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. *Note:* Make sure that emails from **wbars.com** go to your email inbox, and are not sent to your spam or junk mail folder.

If the link does not allow you to re-set your user ID/password, please forward the recovery email to your Compliance Officer/appropriate Funder so that we can figure out why it did not work.

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 to a property) to the Property Manager, then from the Property Manager to the Owner, and then the Owner submits the report to the Funder level. If you look at your current Table 1, 2, 3 or 4 (accessed though the **Reports by Year** section on the Site and Buildings page, not by using the "Edit Table 1" button on the Project Details page), there should be a Submit button in the top right corner of each report. If you don't see the Submit button, then go back to the Site and Buildings page to see what level the report is currently at and who needs to submit it forward.

Q: What should I do if I am having trouble submitting any of the Tables?

A: If you cannot submit Tables 1, 2, 3 or 4, here are the steps to check:

1. Make sure "Able to Submit Reports" is checked for each of the project contacts (Onsite Manager, Property Manager and Owner). 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 their Contact Detail page
   - Make sure the bottom box, "**Able to Submit Reports**" has been checked.
   - NOTE: *Only someone who is an Org 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 each year in the "Reports by Year" section it will indicate what level each Table is at. Each project contact person will have the Submit button when they access Table 1, 2, 3 or 4, when the reports are at their level

3. Access all Tables for each year by clicking on the year link in the "Reports by Year" section and then click on the tab for each Table at the top of the screen.
    - NOTE: *The Submit button is not available if the Tables are 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 can be submitted forward from On-Site Manager to the Property Manager with red validations, but the Property Manager cannot submit it forward with any red validations.*

Q: My organization is very small and I'm both the Property Manager and the Owner contact in WBARS. How do I submit the Tables to Funder level since I'm listed on both levels?

A. First open the Table (1, 2, 3 or 4) and confirm that the report is at the Property Manager level (this message is located right under the Validation Issues line at the top of the report). Then click the Submit button in the top right corner of the Table. When the submission is complete, check the top of the screen again – there should now be a message saying the report is at the Owner level. Log out of WBARS and log back in. Go back into the report. Make sure the message at the top of the screen still says the report is at the Owner level. Now click on the Submit button on the top right corner of the Table. When the submission is complete, the top screen message should now say the report is at the Funder level. Once you see this message, you are done.

UTILITIES

Q: I think I have input all activity for this year. However, I seem to be stuck on changing the utility allowance. 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 page) from the drop-down menu in the Utility Allowance Source field; the correct allowance will then appear in the Utility Allowance field based on the information set up for the building.

MOVE OUTS AND MOVE INS

Q: I am trying to move a resident out and a new resident into a unit on the same date. But WBARS isn't letting me do this – why?

A: Funders know that a unit cannot be turned quickly enough to allow a move out and a new move in on the same date. Therefore, WBARS does not allow a move-out and move-in to happen on the same day. Show the move-out on one date and the move-in the next day or later.

Q: For resident records where a resident moved into their unit prior to 2000, the Move in Income Limit is showing as "N/A" – is this a WBARS bug?

A: No - any move-ins prior to 2000 will not display income limits at the time of move-in because we did not load pre-2000 income limits into WBARS. It is fine for this field to say "N/A" if your resident moved in prior to 2000. If your resident moved in to the unit in 2000 or after and the Move-in Income Limit field still displays "N/A," please alert your Funder.

Q: I have a resident in a HOME unit who moved in prior to 2009, and the Max Allowable HOME Rent field is showing "N/A" – why is this happening?

Funders made a decision to add HOME limits in WBARS as of 2009. So any HOME residents who moved in prior to 2009 will have "N/A" in the Maximum Allowable HOME rent field. Note that for all recertifications performed after 6/26/2010, these resident records will display the appropriate High or Low HOME rent in the Max Allowable HOME rent field.

Q: I just changed the household size for a resident that recently moved in, but the Move-in Max Allowable Income Limit is still the same – why?

A: In order to keep WBARS working smoothly, there are some calculations that WBARS doesn't do until the evening, when the system is refreshed. When Move-in Household Size or Move-in AMI are changed, the Move-in Max Allowable Income Limit will not reflect the change until the next day. Similarly, you won't see the changes reflected on the Excel export until the next day.

– NEW FOR 2011 - FOR TAX CREDIT PROJECTS ONLY –

HUD DATA COLLECTION FIELDS

Q: I just opened a resident record in my project and I see some new sections called "Household Member Info – Data Collection", "Household Member Demographics – Data Collection", and "Household Member Income – Data Collection". What are these new sections?

A: Recently, Congress gave HUD the authority to start collecting detailed household member information from Housing Finance Agencies (HFAs) across the country. As a result, HFAs like the Commission must now send detailed resident information to HUD annually. To do this, we are asking all property managers to give us detailed personal, race/ethnicity, disability and income/asset data for every household member.

To enter the data for each household member, click on the plus ("+") sign in one of the new sections (symbol is on the far left of the blue section bar) and all new sections will open up on the screen. Use your cursor or the TAB button to go from field to field, filling in the data for each household member.

Q: I've never collected some of this information on residents in my tax credit properties before – how do I get this information from them?

A: Go to WSHFC's forms and reports page on our website and click on **Resident Certification Packages**. You will notice that we have revised our **Rental Eligibility Application** as well as our **Eligibility Certification** (now called the **Household Eligibility Certification**) so you can collect more income and asset data. You will also see a new **Household Demographics** (HD) form. The HD form must be completed by every household at initial certification. You will then use the **Household Eligibility Certification** and the **Household Demographics** form to help you enter the new data into WBARS.

Q: I'm a little uncomfortable asking applicants to complete the Household Demographics form when I'm qualifying them for occupancy; it could look like we're using their demographic information to evaluate their application. What should I do?

A: Have new households fill this form out ***after you have approved them for occupancy***, ideally on the day they are signing their lease or when you are giving them the keys to their unit. That way, you won't run the risk of having applicants think that their demographic information is related to their qualification process.

Q: What do I enter in WBARS if a new household doesn't want to give me any race or disability information?

A: Residents are not required to tell you their race or if they are disabled. If your residents did not give you this information, you can check (or choose, depending on the field) the "Did Not Disclose" option in WBARS. You can make this choice for every household member that refuses to answer the race or disability questions on the **Household Demographics** form.

Q: When I look at the data collection fields, I notice that a lot of them already have default data in them, like "9999" in every SSN field, or "HHM" in each Last Name field. Why is this?

A: In order for WSHFC to electronically submit data to HUD every year, nearly every field has to have a value in it. If you are unable to give us all the data needed for every household member, then the default values will remain, allowing us to still submit reports to HUD. You can edit any field by selecting and then typing over what is already there - when you save the page, your new data will overwrite the default values.

Q: Do I have to fill in every Data Collection field before I can save the page?

A: No. You can still save the record, even if you've only filled in a couple fields.

Q: I just tried saving the record and WBARS won't let me – it gives me a message saying that the Total Annual Household Income has to match the Current Annual Gross Income – what is going on?

A: This means that whatever income and/or asset information you entered in the "Household Member Income – Data Collection" section does not add up to the amount that you entered in the Current Annual Gross Income field in the regular "Household Income" section. You'll need to go back and correct the individual income and/or asset amounts until the **Total Annual Household Income – All Sources** field amount (in the Data Collection area) matches the amount in the **Current Annual Gross Income** field (in the section above). Once these two fields match, WBARS will let you save the record.

Q: Is there a deadline for entering this information?

A: There is no deadline, just enter this data as you enter other updates throughout the year. If you get to the end of the year and are still missing information for some residents, it's still okay for you to submit your annual report without it.

Q: We've never collected race and ethnicity data from residents before. How do I enter this data in WBARS for residents who are already in place?

A: Have each household complete the new **Household Demographics** form at the time of their recertification. If you have already completed their 2011 recertification, you can wait until 2012 to have them complete the form. Remember to have all newly qualified households complete this new form before they move in.

Once each household has completed this form, they are not required to complete it again unless their household composition changes.

Q: I don't have any tax credits in my project – do I need to fill out these new fields?

A: No. In fact, if you don't have tax credits in your project, these new fields will not show up on your screen.