



Department of Commerce



WASHINGTON STATE
**HOUSING FINANCE
COMMISSION**

Opening doors to a better life

User Guide

2019 WBARS Improvements

We are making WBARS easier to use



Washington State Housing Finance Commission

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How to Use This Guide?

This User guide is intended to keep updated the WBARS. The goal of this document is to ensure that the user understands the application completely, every effort has been made to ensure that this document is an accurate representation of the functionality of WBARS.



Save paper—Don't Print! This guide was created with the intent of being used electronically, alongside the Web Based Annual Reporting System (WBARS). While printing the Guide is of course possible, by utilizing its online features we believe it will prove much more valuable.

Searchable - The Guide can be searched for any specific term you are looking for, using the Search box of your PDF viewer (press Ctrl+F in Windows). Jump directly to instructions for any WBAR page by entering the page name in the search box. The page name is the last “breadcrumb” in grey on the Navigation bar at the top of each page. In the sample below the page name is “Project Details”

Internal links are live. Clicking on links will jump you to the section of the guide detailing that element.

One more note: While WBARS covers most of the information required for Annual Reporting, each Funder has its own set of additional reporting requirements.

If you encounter any difficulties in using the Guide, please email us.

Introduction to Web-Based Annual Reporting System (WBARS)

About WBARS

Washington State public funders have implemented an online reporting system, WBARS, used by owners and managers to report data from their affordable multifamily rental projects. Currently several major public funders have adopted the system and participation is growing throughout Washington State. The public funders include Washington State Housing Finance Commission, State Department of Commerce (Housing Trust Fund), City of Seattle, King County, Snohomish County, City of Tacoma, and City of Spokane. The system satisfies program and contract reporting requirements and tracks most of the main components of project performance (operation indicators, income, expense, status of reserves, tenancy, etc.)

History of WBARS

In 2000, major Washington public funders began to collaborate on project compliance, asset management and property inspection issues. The group named themselves the Monitoring Coordination Taskforce (MCT) and agreed to combine efforts that would streamline administration in the following

areas: Joint On-Site Inspections, Standardized Reporting Forms, Asset Management Oversight, Contract Changes and Workouts, Transfers of Ownership, Management Changes and Joint Training Workshops.

Inspections were coordinated among funders and a Combined Funders Annual Report (Excel file) was implemented. Property owners could submit the same report to all funders who had an investment in the project. The end results have been better communication and reduced administrative work for public funders and reduced redundancy for the housing owners and managers.

In 2009, the reporting process evolved into the next generation through the introduction of WBARS. WBARS is a comprehensive and “real time” reporting system that tracks compliance monitoring requirements as well as being an asset management tool shared by the funders noted above. The funders believed an Internet-based tool was the logical next step to meet needs of both funders and property owners/managers in today’s electronic world. WBARS continues to help the MCT group share resources, staff and expertise to streamline and prevent duplication of effort, share information and maximize oversight leverage.

What has WBARS accomplished?

- Over 1,550 properties with approximately 100,000 units are now in the system.
- Over 2,000 owner and manager contact numbers and emails are in WBARS. These are updated by the managers themselves as on-site and property management staff change frequently.
- Public funders are actively using the system and participation is expected to grow. Funders enter their individual contractual requirements for each of their properties.
- WBARS accepts data from housing providers’ internal database systems for more efficient reporting:
 - Agencies can enter project information one time and information stays in system
 - The system holds data from prior years for points of reference.

- Property management software vendors (Bostonpost, Yardi, eSite, Real Page, and others) have been able to upload data into WBARS.

Contractors Report Multiple Activities in Four Tables:

Table 1: Rent Roll - a comprehensive rent roll with incomes, rents, subsidies, utilities, set-aside limits and special needs categories. Calculations can be gleaned from the data such as Occupancy Rate, and Turnover Rate. An annual report summary shows how the property matches up to each funder's requirements.

Table 2 and 3: Demographics – including race, ethnicity and disability status.

Table 4: Income and Expense Report – an annual report which shows income sources (including revenue from rents and subsidies), line item expenditures, debt payments, status and activity of reserve accounts. Averages and trends can be calculated from the information provided in this report.

WBARS represents a significant financial investment for Washington State Housing Finance Commission and Washington State Department of Commerce, as well as significant staff time from City of Seattle and King County. We believe it is a good investment and a significant achievement, and that the benefits far outweigh the costs.

WBARS is saving time and staff resources for both funders and owners/managers while delivering better, cleaner, and more accurate data.

From a funder standpoint, WBARS calculates many functions that staff historically had to hand count. It prevents managers from making many of the errors that were possible using Excel spreadsheet reports, and it prevents the need for lots of back and forth correspondence between funder staff and management.

This allows funder staff to focus our efforts on more important audit and asset management functions. Public funders can upload WBARS data into their internal systems and run monitoring and performance reports for their individual housing portfolio, facilitating richer analysis.

From a property owner/management perspective, WBARS is a tool that can save them time and money. It allows users to easily enter data directly into the system and keeps historical data. It allows users with various software systems to work throughout the year in their own systems and

then upload data into WBARS at their convenience. It provides all users with real time compliance where they can instantly see whether projects are in compliance with all funders participating in WBARS. Finally, WBARS allows owners to report to one place regardless of whether they have one funding source or six on a project.

System enhancements currently in development are multiple reporting and asset management functions that funders and owners/managers could use to meet a variety of needs, including submarket needs or performance issues analysis. WBARS increases our capacity to monitor affordable housing operations; moreover, WBARS-generated reports will more effectively inform planning and policy decisions in a period of declining resources.

Questions?

For general information about the system, please contact Melissa Donahue, Compliance Manager (WSHFC) at melissa.donahue@wshfc.org, or Nona White, Program Specialist (Department of Commerce) at nona.white@commerce.gov. For questions regarding development costs or potential usage of the system by another public funder, please contact Melissa Donahue, Compliance Manager (WSHFC) at melissa.donahue@wshfc.org. For information regarding King County's system usage experience, please contact Eileen Bleeker, Project Manager, at eileen.bleeker@kingcounty.gov.

Overview of the WBARS System

What is WBARS?

WBARS is the web based annual reporting system for the combined funders to submit Combined Funder Annual Reports (Tables 1, 2, 3, 4). Participating public funders include,



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Seattle

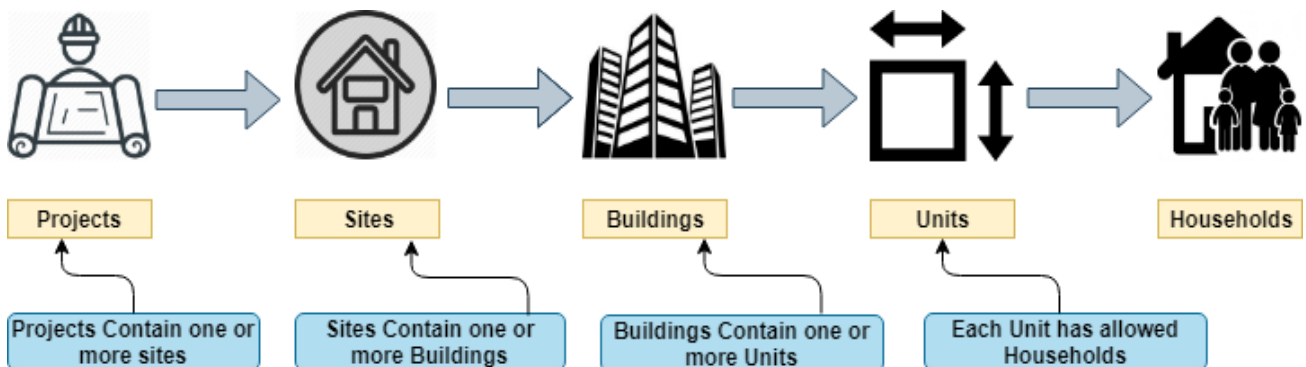


King County



Snohomish
County

The project set up in WBARS system



Annual Reports are submitted for each **SITE** separately for each Calendar year

Reports? What does it contain?

- **Report Cover Page**

↳ The report cover page showcases the overview of the information that the report has.

- **Table 1**

↳ Table 1 contains the household details such as Building, Unit, Household Name, Move In/Out Date, Certification Date and other related details

- **Table 2 and 3**

↳ Table 2 and 3 carries the demographic and count needs for the year

- **Table 4, 4(a) and 4(b)**

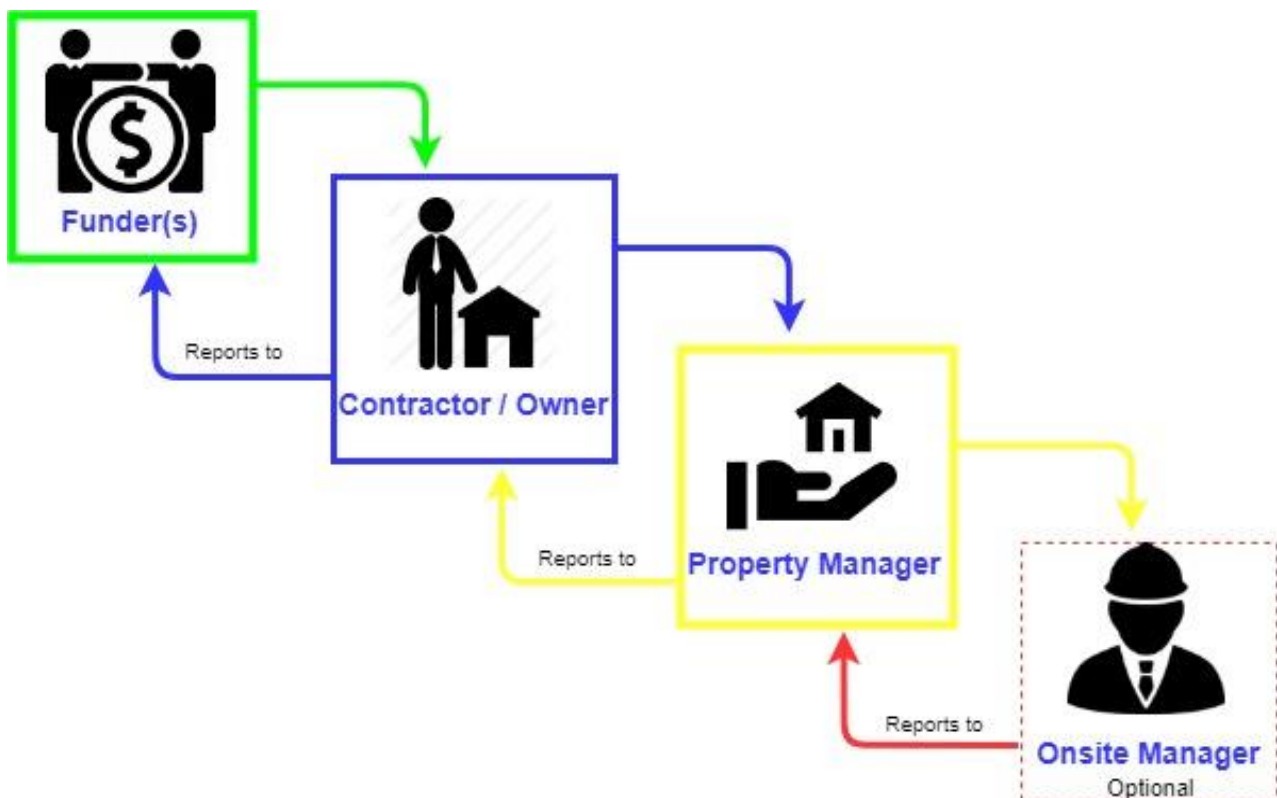
↳ Table 4 carries the financial data for the calendar year such as Project Income and Expense, Reserves, Performance Measures and other related information's needed

Report submission process

The reports are submitted for each table separately. The history of all report submission is tracked in the system and the summary of each table reports can be viewed in the report cover sheet.

WBARS follows reporting hierarchy where the assigned reports are submitted to their reporting hierarchy only. Here we explain below how WBARS Reporting hierarchy works.

WBARS Reporting Hierarchy



In WBARS, each level of reporting hierarchy can submit or un-submit the reports to the next level up or down. If a report is submitted all the way to Funder level, and a mistake is discovered, the report must first be unsubmitted from Funder to Contractor/Owner level, then from Contractor/Owner to Property Manager level, for the mistake to be corrected. This will be very rare

because all the funders need to agree that there are critical errors. It is imperative that close attention be paid to ensuring accuracy before submitting up the hierarchy.

- **Onsite Manager** – The onsite manager submits reports to the property manager. (*Assigning onsite manager is an optional authority to the property manager*)
- **Property Manager** – The property manager submits reports to the contractor/owner
- **Contractor/Owner** – The contractor/owner consolidates and verifies the overall reports received and submits the reports to the funder

The funders are the organizations associated with the system who fund for the projects. All the monetary resources required for the project will be funded by the funder and they occupy the top level in reporting hierarchy where the final reports get submitted.

WBARS User Roles

Organization Administrator (OA) / Super Admin

The Organization Administrator is responsible for managing the contact information and permissions of staff involved with reporting in WBARS, including the adding of staff members to WBARS. Each organization (Contractor/Owners and Property Management Orgs) needs to assign one or two staff to be an "Administrator".

The OA is also responsible for configuring Utility Allowances for each site in a project and for reviewing the restrictions placed on a project by Funders.

Contractor/Owner

The Funders have already set up the Contractor/Owner records for each of the projects in the system and only the funders can set up the contractor/owner each project.

The Contractor/Owner is responsible for submitting reports to the funder level after they have been submitted to the Contractor /Owner by the Project Property Manager. The person who submits the report for the Owner must be authorized to do so and verify that they have that authority.

The Contractor/Owner is not responsible for or able to edit Table 1-4, 4a, 4b records as this is a Property Manager function. Owners who need to also fill out or edit Table 1-4, 4a, 4b will need to set themselves up as both Contractor/Owner and Project Property Manager for a project.

Property Manager

The Property Manager is responsible for submitting reports to the Contractor/Owner and for maintaining Table-1-4, 4a, 4b records. The property managers can be set by the funders or by the Contractor/Owner.

On-Site Manager

The On-Site Manager selection is optional but if included this person is responsible for maintaining Table 1 records and is responsible for submitting reports to the Property Manager. Property Managers set up On-Site Managers in the system. Do not designate the Onsite Manager as the Property Manager as well as this might cause a problem in WBARS.

In this system, one can be a property manager or as a on-site manager but can't serve both at the same time.

Users and their Tasks performed

Organization Admin (OA)

As discussed earlier, each organization must set up OA and they perform several tasks and let's see it briefly below,

- Maintain Project and Contact Information for your Organization
 - Assign Staff to Each Project
 - Review Unit Information for Accuracy
 - Set and Maintain Utility Allowance Records
 - Review Funder Restriction Records
-
- **Maintain Project and Contact Information for your Organization**

On the Organization page link make sure the information listed for your organization is correct. On the Projects link page, click on the + sign to the left of your organization's name. You can also click on the underlined name of your organization to view the complete list of contacts. Click on each staff person's underlined name to open the Contact Detail page for that person. Under each Contact Detail page, review all information and make edits where appropriate. As the WBARS Organization Administrator you are responsible for ensuring that this information is up to date and accurate. Staff can also update their own Contact records, but you can help them by resetting passwords here and ensuring that they have the proper system permissions to work in

WBARS. You may also add new staff to the contact list and “inactivate” staff as necessary by unchecking the Active box on their Contact page. Set the appropriate permissions for all staff using the system. Read more about staff permissions and roles in WBARS in the Contact Detail section and Overview of the WBAR System sections of this Guide.

- **Assign Staff to Each Project**

Every project must have a single staff person assigned to Contractor/Owner level and the Property Manager level in the reporting hierarchy. An Onsite Manager level may also be assigned as needed.

- To assign someone as the Contractor/Owner for a project go to the Project Details page. This level must be filled by a staff person at the Contractor/Owner organization.
- To assign a contact as a Property Manager (PM) or On-Site Manager (OM) for a particular Site go to the Sites and Buildings Page for that site. The PM or OM staff can either be from the Contractor/Owner Organization or from a separate Property Manager Organization.
- Only a single contact can be assigned at any time to each level in the reporting hierarchy. However, it is a simple thing to swap these contacts around if needed so that different staff can work on different areas of the report. For example, you may want to have one contact work on Tables 1, 2 and 3 but switch to another person for completion of the financial information on Table 4. You can switch staff around as much as you need to prior to submitting each table to the Contractor/Owner level in the system.

- **Review Unit Information for Accuracy**

- On the Projects page, click on the Project Name of a property.
- On the Project Detail page, scroll down and click on each Site Name for the property. Click the underlined site name to go to the Sites and Buildings page.
- 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. You will not be able to edit the information you see here. If you see any issues that need to be corrected, please contact your monitoring funders.

- **Set Up and Maintain Utility Allowance Records**

- Each site and building at a project must be configured with all of the allowances that will be used during the report year. These records are accessed on the Sites and Buildings page for each project. For more details refer to the Utility Allowances section of this guide.
- 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. You will also not be able to save your Table 1 Detail information for that household without first selecting a Utility Allowance
- Funders do not configure or maintain the Utility Allowance section of WBARS—This is the responsibility of the Owner/Contractor.

- **Review Funder Restriction Records**

- On 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. 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: Each Funder involved in your project will likely have different set asides and restrictions. Keep in mind that you are reporting to your most restrictive funder.

Contractor/Owner (C/O)

The c/o have already been set by the funders for each project in the system. The c/o collects reports for each table verifies / checks it for the accurate report submission to the funders. In case if the c/o needs to edit the table, they will have to add themselves as the property manager as well and they can edit the table.

Property Manager

Each project will have the property manager and they will have the access to edit all the report tables 1 to 4 (4a, 4b). The property managers submit the reports to their c/o.

Onsite Manager

The Onsite Managers are assigned for each property by the property managers where they have the access to edit report tables for their assigned property and submit the report to the property manager.

Validation Flags

The validation flags are the alert notification set up to convey the issues (missing information) in the reports where the contractors/owners or the project manager address the issues and make sure that there are no validation issues before they submit the report to the funder.

The Funders have already set up the requirements for each field to fulfil the reports criteria and the system uses specified colours to categorize the issues base on the validation and notify us in means of 3 different colours. Each colour has its own set of validation message to convey. They are,

Green	The system compliance has no identified issues. <i>(This is not a guarantee that everything is okay with the report)</i>
Yellow	There are issues with the compliance and there is an explanation needed
Red	There are critical issues with the reports and the reports can't be submitted until the issues are corrected


















Report Submission due dates

Due Date: JANUARY 31	
Organizations	Reports to be submitted
City of Spokane	Table 1,2,3
City of Tacoma	Table 1,2,3
King County	Table 1,2,3
WA State Dept. of Commerce – Housing Trust Fund	Table 1,2,3
WA State Housing Finance Commission	Table 1

Due Date: JUNE 30	
Organizations	Reports to be submitted
City of Seattle	Table 1,2,3,4
City of Spokane	Table 4
City of Tacoma	Table 4
King County	Table 4
Snohomish County	Table 1,2,3,4
WA State Dept. of Commerce – Housing Trust Fund	Table 4
WA State Housing Finance Commission	Table 4

*The due date for any Annual Report Table is the earliest required by any Funder contributing to the project. Please check with your Funders to ensure you have the correct due date. Except in certain circumstances, it will not be possible to edit a Report Table later in the year after it has been submitted. As a practical matter, this means you must complete each Table to the level of detail required by your most restrictive Funder and submit it by the earliest date required by any of the Funders involved, whether the most restrictive funder is the one with the earliest due date

Indications to Be Known

	Used to highlight the relevant portions to the content in this document
	Used to define mandatory Fields
	Click on this to navigate between pages
	Clicking on this button clears the search filter typed
	Unclaim
	Homeless (Home Program)
	NHTF Program
	Pagination – You can move from page to page forward and backward or click on the number for viewing specific page
	Sorting (Ascending Order / Descending Order)
	Download Button (Click on this to download)
	Unsubmit the report table
	Submit the Report table
	Transfer (To Transfer Household Unit)
	Bulk upload Utility Allowances
	XML Data Import (Click to import Table 1)
	Delete / Remove
	View Reports

Getting Started to Report in WBARS

1. Account Setup

To access WBARS system you must have organization approved account created where you can access the system.

Okay! Let us see how to get your account setup,

1.1 Contractor/Owner Account

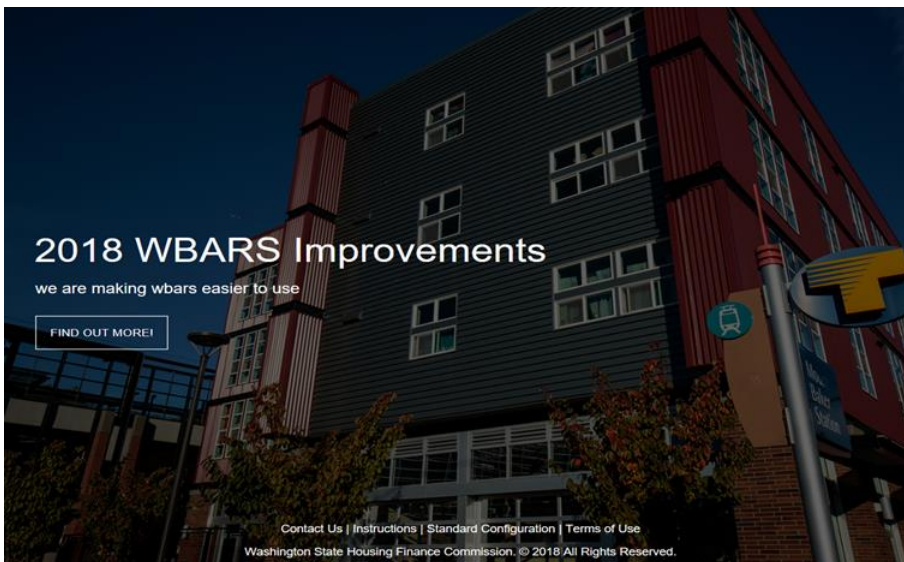
The Organizations Administrators (OA) or the Funder have the rights to create an account for you. Check with others in your organization to identify who is your WBARS OA/Funder and reach them in order to get your account created to get started.

1.2 Property Manager Account

The Contractor/Owner will create your account and you can use the credentials shared by them to access the WBARS system

2. Account Login

The user needs to login his account to access the system. [Click here](#) for the login page and provide your username and password to access your account.



The steps to access or login the WBARS is shown below.

Step 1 – Enter the Username

User Name *

You need to provide the registered / admin created “Username” in the user name field. In case if you provide an invalid username, a warning message will be shown “*Unknown Username or Password*”

Step 2 – Enter the Password

Password *

After providing the user name the next step is to provide the password of the User name used to login.

Step 3 – Click on Login

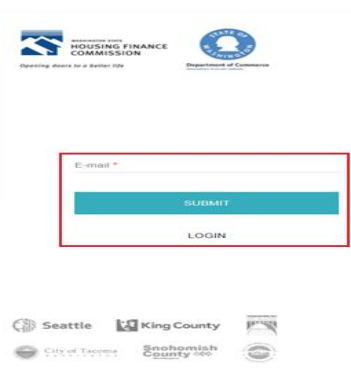
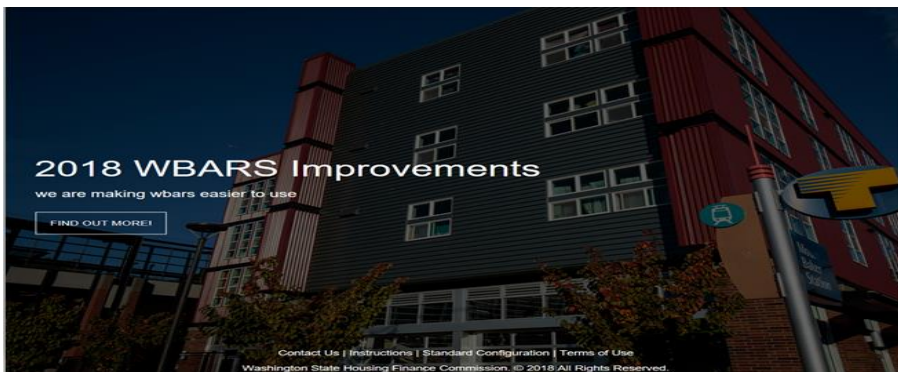
LOGIN

Once the you enter both “User Name” and “Password” click on “Login” button to login the WBAR system

2.1 Forgot Password

FORGOT PASSWORD

In case if the user forgot the password, they can click on “FORGOT PASSWORD” which will lead to a page requesting the registered email ID where the password reset link to the registered email ID



Steps to Recover Password

Step 1 – Enter the Email ID

E-mail *

The user will enter the email ID registered with WBARS system. In case if an invalid email is provided the system will show a warning message *“E-Mail is either empty / invalid”*

Step 2 – Click Submit



The user will Click on the submit button after providing the registered email address where the user will be notified with the message *“Reset Password link has been sent to your email”*

Reset Password link has been sent to your e-mail.

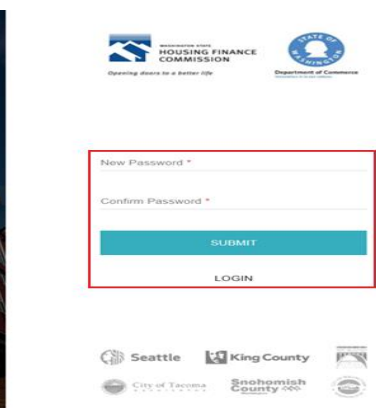
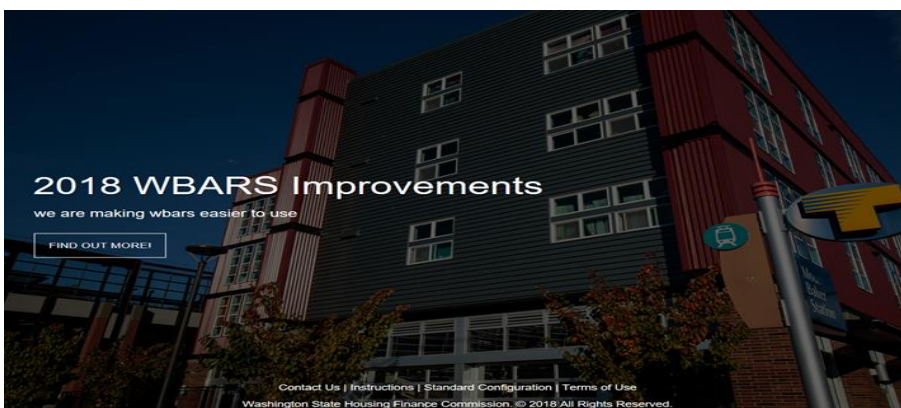


Step 3 - Login



The “Forgot Password” page has the “LOGIN” option where the user can click on login which will lead the user to “ACCOUNT LOGIN” screen. The user can click on login to skip forgot password in case if they still remember the password and can login the application by themselves.

2.2 Reset Password Page



Step 1 - Enter the New Password

Password Criteria – The password should contain combination of Special Characters, Numbers and Uppercase

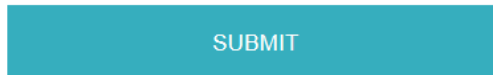
New Password *

The user will enter the new desired password which will be used for further login to the WBARS system. If the password isn't full filling the criteria mentioned above, then the new password will not get updated and a warning message will be shown *"Password is too weak. Please use combination of special characters, numbers and uppercase"*

Confirm Password *

The user will enter the new password again in "Confirm Password"

Step 2 – Click on Submit



The user will click on the submit button after providing the new password. In case if the "New Password" and "Confirm Password" are not matching the user will be notified with a warning message *"Password does not match"*

3. Welcome




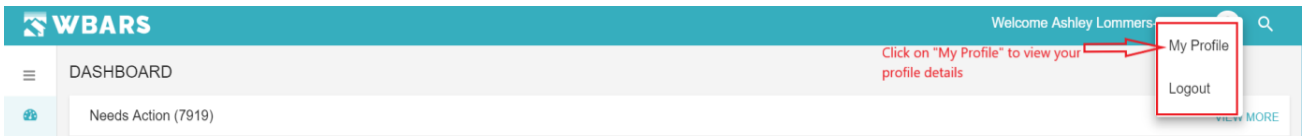
The application shows the user name of the current login right after the welcome.

4. My Profile



"My Profile" is where you can see all your profile related information.

Once you click on **"My Profile"** icon  you can see the following options as shown in the image below,

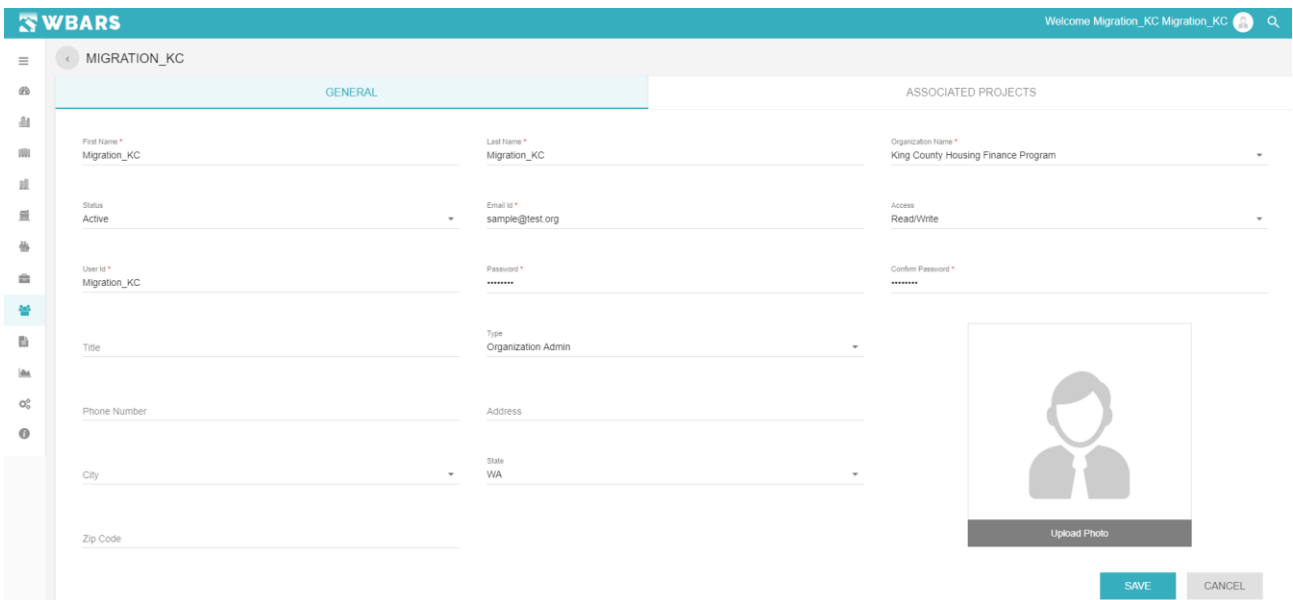


Once you click on “My Profile” the profile details page will be shown. The page has 2 sections. They are,

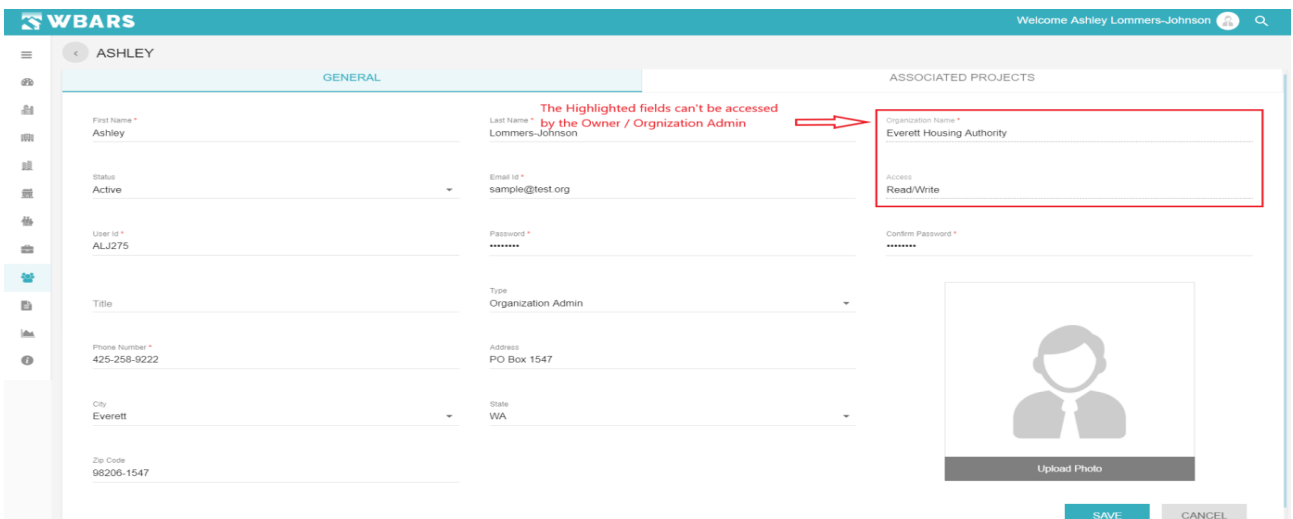
- General
- Associated Projects

The user interface is same for all the system users, but the access rights are different for a Funder, Owner and contractor / Manager. Let’s see the details below,

Funder



Owner / Organization Admin



The Owner / Organization Admin can view and edit their profile details, but they have no access to the following fields,

- Organization Name
- Access

Contractor / Manager

The contractor / Manager has no access to the following fields,

- Organization Name
- Status
- Access
- Type

Let's see the properties and functions that each field carry in the general section and how you can edit and update your profile,

4.1 General

GENERAL

The General section has the overall profile details of the user account where they can view and edit their profile.

4.1.1 First Name

The user can enter or edit their first name in this field. Once the user clicks on the field it gets highlighted as seen in the image above where they can edit their first name.

Condition

- Should have minimum 3 characters and maximum up to 50 characters
- (*) Mandatory field and can't be blank

4.1.2 Last Name

The user can enter or edit their last name in this field. Once the user clicks on the field it gets highlighted as seen in the image above where they can edit their last name.

Condition

- Should have minimum 3 characters and maximum up to 50 characters
- (*) Mandatory field and can't be blank

4.1.3 Organization Name

Funder

The Funder can change their Organization Name by clicking ▾ dropdown where the list of organization name will be shown, and they can click on the required organization name. If you click on “SAVE” you will get the success notification “Updated Successfully”.



Contractor / Manager

Organization Name *
Everett Housing Authority

The field can't be accessed as **Contractor / Manager** have no permission to access this field.

4.1.4 Status

Funder / Organization Admin

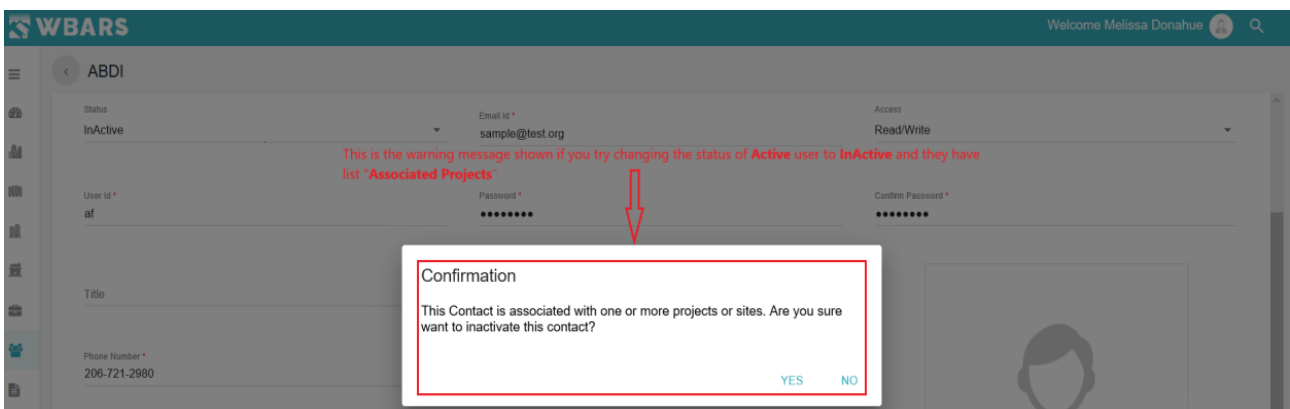
Status
Active ▾

The Funder / Owner can change the status of User account by clicking the ▾ dropdown where two account status will be shown in the dropdown list,

- Active
- Inactive

The Funder / Owner can choose “**Active**” for the User to be active to access the application or choose “**Inactive**” where the user will have no more access to the WBAR system until made active.

If you are changing the status of a user from “**Active**” to “**InActive**” and if the user has “**Associated Projects**” there will be a warning message requested as in the image below,



If you click “**Yes**” the user profile will be changed from **Active** to **InActive** or terminate the process by clicking “**No**”.

You can identify the inactive users where the inactive users will have “*(Asterisk)” symbol before their name as shown in the image below,

Name	Organization Name	Role	Access	Address	City	State	ZipCode	PI
*A. Hianus	Sound Generations	Onsite Manager	Read/Write			Washington		
Aaron Dumas	Washington State Housi...		Read/Write			Washington		2C
Aaron Long	Low Income Housing Ins...	Onsite Manager	Read/Write			Washington		2C

4.1.5 Email Address

Email Address *

sample@test.org

The user can enter or edit their email id in this field. Once the user clicks on the field gets highlighted as seen in the image above where they can edit / enter their email id. The user can click on the icon which removes the characters existing in the field and the user can enter their new email id.

Condition

- The email id should be valid (Ex. anna@wbars.com)
- The user can't save the profile without entering a valid email ID. If the User saves the profile without email ID then the system shows a warning as shown in the image below,

Email Address *

this field is required

4.1.6 Access

Funder

Access

Read/Write

Only the Funder can change the access rights of the User profile. By clicking the dropdown, the access right list will be shown. They are,

- Read / Write
- Read Only

Read / Write – The user has the access to view and edit the fields where they have permission.

Read only – The User will have only the view access and can't edit any field

Conditions

- Funders from WSHFC and Commerce will have rights to edit this control.

- Can be applied to Non-Organization Administrator Funder contacts only.
- When user attempts to select both Read access and Organization Administrator then it will show an error message “A Read Only user cannot be an Organization Administrator!”.
- User can set Read access to Onsite Managers when the user attempts to select both Read-only and Onsite Manager checkbox should show a message “A Read Only user cannot be an Onsite Manager!”

4.1.7 User ID



The user can enter or edit their user id in this field. Once the user clicks on the field it gets highlighted as seen in the image above where they can edit their user name. The user can click on the × icon which removes the characters existing in the field and the user can enter / update their user name.

Condition

- Should have minimum 3 characters
- (*) Mandatory field and can't be blank

4.1.8 Password



The user can edit /update their password in this field. Once the user clicks on the field it gets highlighted as seen in the image above where they can edit / update their password.

Condition

- The password should contain at least 7 characters
- A warning message will be shown If the user proceeds to save the profile without a password



- (*) Mandatory field and can't be blank

4.1.9 Confirm Password



The user will provide the same that they have provided in the password to confirm that both the provided password matches.

Condition

- The “Password” and “Confirm Password” should be the same. If the password isn’t matching the system shows a warning message as shown in the image below,



- (*) Mandatory field and can’t be blank

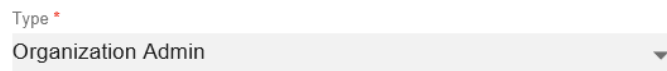
4.1.10 Title



The user can enter their contact role as title. This is a non-mandatory field where the user can enter the title if required or they can leave this field empty.

4.1.11 Type

Funder / Owner



The “**Type**” is referred to as the users account type where there are three types available and only the admin has the access to change the type. The types are,

- Organization Admin
- Onsite Manager
- None, the **Funder / Owner** can choose the type.

If you choose **Organization Admin** then the below mentioned rights will be applied to the user profile,

- Can create New Contact
- Can have the access to change Property Manager, Onsite Manager of his organization projects
- Access to Edit, Delete and Add Utility Allowances of his organization projects.
- Edit the contact information for any staff person at their organization.
- Set the user permissions for each staff person
- Activate or inactivate any staff record

- Change User IDs and/or passwords for any staff at their company

If You choose **Onsite Manager** then the below mentioned rights will be applied to the user profile,

FYI - WBARS does not require anyone in the Onsite Manager role.

- The “Onsite Manager” box should be checked only for those staff entering rental activity into WBARS that will be submitting to a Property Manager
- If a staff person is the Onsite Manager, they cannot also be designated in WBARS as the Property Manager. Please note that WBARS designated Onsite Managers and Property Managers may enter rental activity into WBARS
- Cannot be assigned as Owner or Property Manager, so this contact will not have listed when assigning Owner or Property Manager.
- A user can either be an Organization Administrator or an On-Site Manager.
- Should show an error message when deactivating an Onsite Manager who is associated with some other projects

Condition

- (*) Mandatory field and can't be blank

Managers

Type
Onsite Manager

You have no access or authority to change the “Type” as the **Funder / Owner** has the authority to set your user type

4.1.12 Phone

Phone

All users have the access to this field where you can enter your phone number, this is a non-mandatory field where the user can enter the phone number if required or they can leave this field empty.

Condition

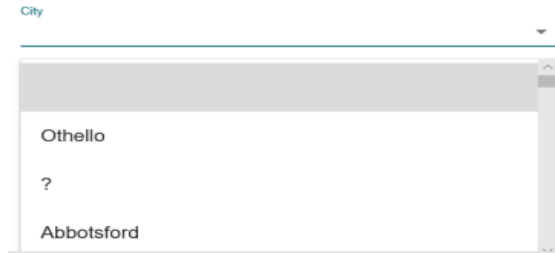
- The number should be minimum of 10 characters

4.1.13 Address

Address

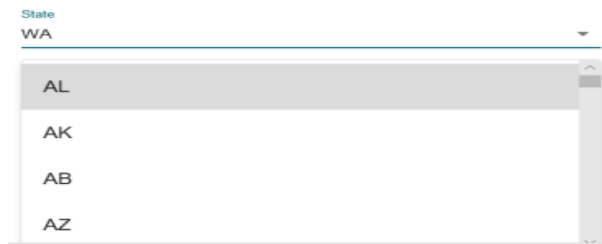
All users in the WBAR system has the access to edit / Change the “**Address**” where you can click on the field and type your address.

4.1.14 City



Click on the “**City**” field and choose your city from the dropdown list or you can type your city name where the relevant results will be shown in the dropdown once you start typing and you can choose the city from the dropdown.

4.1.15 State



Click on the “**State**” field and choose your State from the dropdown list or you can type your state name where the relevant results will be shown in the dropdown once you start typing and you can choose the state from the dropdown.

4.1.16 Zip Code

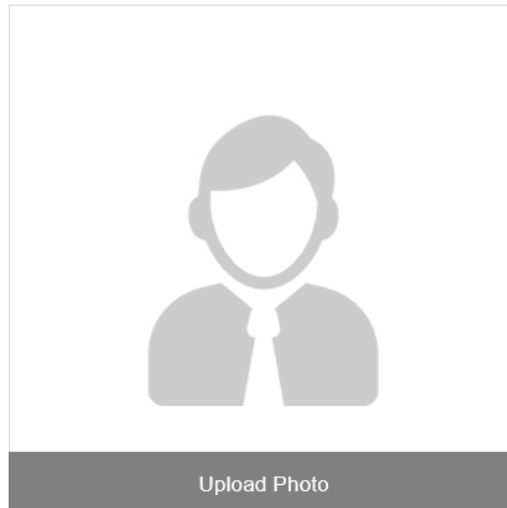
Zip Code

Click on the zip code field where the field gets enabled and you can enter your area zip code.

Condition

- Enter a valid Zip code

4.1.17 Upload Photo



Click on “Upload Photo” and the computer folder gets opened where you can choose the desired picture and click open which will be your set as your profile picture.

4.1.18 Save



After entering all the detail required in the profile section you can click on “SAVE” where all the changes made will be saved

Condition

- Make sure all the (*) Mandatory fields are filled before clicking on “SAVE”

4.1.19 Cancel



You can click on the “CANCEL” button if you don’t want to proceed with you profile edit or updating. Once you click “CANCEL” the system will take you back to the [dashboard](#).

4.2 Associated Projects

ASSOCIATED PROJECTS

The “Associated Projects” shows the list of all projects associated with the user login. The user interface screens of Funder and Contractors / Managers are shown below,

Funder

WBARS Welcome Migration_KC Migration_KC

MIGRATION_KC

GENERAL				ASSOCIATED PROJECTS				
Project Name	Owner Organization	Management Company	Contract ID / OID	Monitoring Status	Total Sites	Total Buildings	Total Units	Role
1 South Madella	Everett Housing Author...	Everett Housing Author...	16-06	Monitoring	1	7	47	
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100 A, 7171	Monitoring	3	1	88	
13 West Apartments	Everett Housing Author...	Everett Housing Author...	15-99A	Monitoring	1	2	92	
15 West Apartments	DBG Properties LLC	GSL Properties Inc.	14-46A	Expired	1	1	120	
3904 MLK Way	SouthEast Effective De...	Coast Property Managem...	3390, 99-172A	Expired	1	1	33	
Abbey Lincoln Court	Everett Housing Author...	Everett Housing Author...	15-81A, 7105	Monitoring	1	1	68	
add	Vltus Group			Pending	1	0	0	
ash	Everett Housing Author...	Everett Housing Author...	12-100A	Monitoring	1	1	1	
brook	Everett Housing Author...	Everett Housing Author...		Monitoring	1	2	2	
Cherry Phase	Everett Housing Author...	Everett Housing Author...		Monitoring	1	2	2	
Claim PT	Everett Housing Author...			Monitoring	1	0	0	

Displaying 1 to 11 of 24 records

Contractors / Managers

WBARS Welcome EHA Property Manager

EHA

GENERAL				ASSOCIATED PROJECTS			
Project Name	Owner Organization	Owner Contact Name	Contract ID / OID	Total Sites	Address	Email ID	Role
1 South Madella	Everett Housing Author...	Ashley Lommers-Johnson	16-06	1		prathu@intelectyx.com	Project Manager
12th Avenue Arts	Capitol Hill Housing	Christopher Persons	12-100 A, 7171	3		sample@test.org	Project Manager
13 West Apartments	Everett Housing Author...	Ashley Lommers-Johnson	15-99A	1	12	prathu@intelectyx.com	Project Manager
2500 E Union	YWCA of Seattle-King C...	Anna Preyapongsean	3723	2		sample@test.org	Project Manager
60 Project	Everett Housing Author...	Ashley Lommers-Johnson		1		prathu@intelectyx.com	Project Manager
Abbey Lincoln Court	Everett Housing Author...	Ashley Lommers-Johnson	15-81A, 7105	1		prathu@intelectyx.com	Project Manager
ash	Everett Housing Author...	Ashley Lommers-Johnson	12-100A	1		prathu@intelectyx.com	Project Manager
Bakerview Grandview Al...	Everett Housing Author...	Ashley Lommers-Johnson	14-79A	2		prathu@intelectyx.com	Project Manager
Broadway Plaza	Everett Housing Author...	Ashley Lommers-Johnson	11-60A	1		prathu@intelectyx.com	Project Manager

Displaying 1 to 9 of 46 records

The “Associated Projects” shows the following details,

1. Project Name	2. Owner Organization	3. Owner Contact Name
4. Contact ID / OID	5. Total Sites	6. Address
7. Email ID	8. Role	9. Monitoring Status (Funder Only)

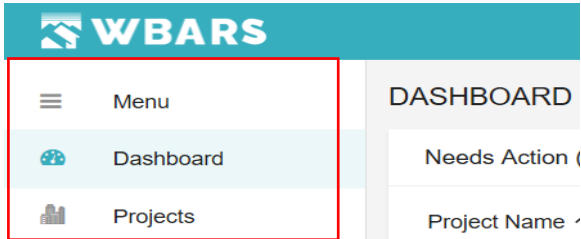
The funders additionally have the option to view the “**Monitoring Status**” where the Contractors / Managers can’t Monitor the projects. The above screens shows the differences and the fields that can be viewed under “**Associated Projects**” for a **Funder** and **Contractor / Manager**.

Project Name – The Project name is a link where you can click on it to view the [project details page](#).

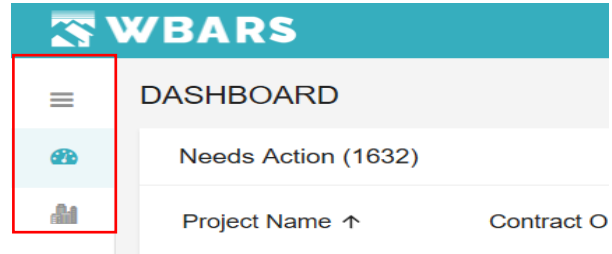
5. Menu

The menu is where you can explore overall features available in the application. Clicking on Menu icon “☰” Shows / Hides the options to access overall. Please view the images below to understand how clicking on the “Menu” works

Show Menu



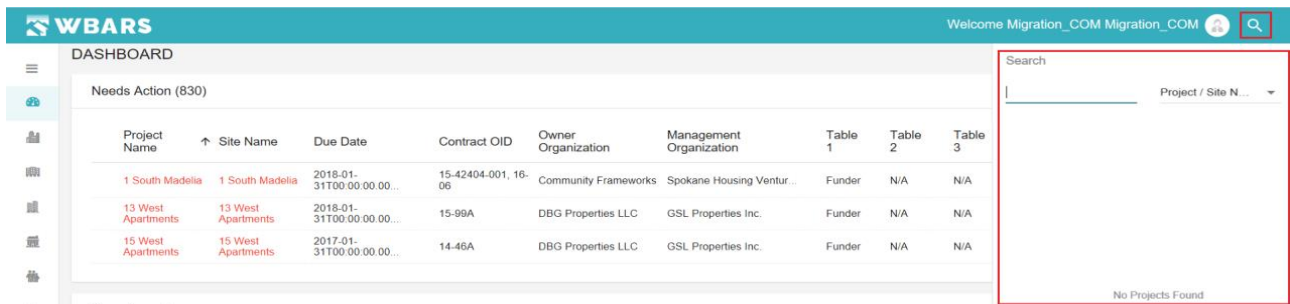
Hide Menu



6. Global Search

Global search is located at the top right corner of the application interface. Just a click on the “🔍 search icon” and Global search opens to sort out the inconveniences in searching and finding a project information in the WBARS system.

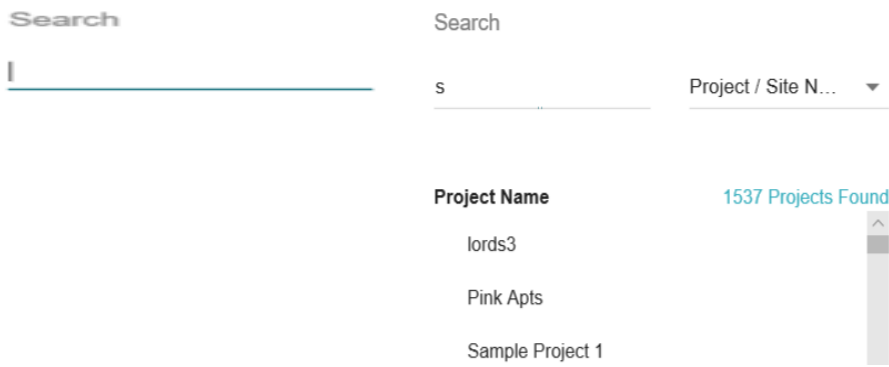
This is how the global search works,




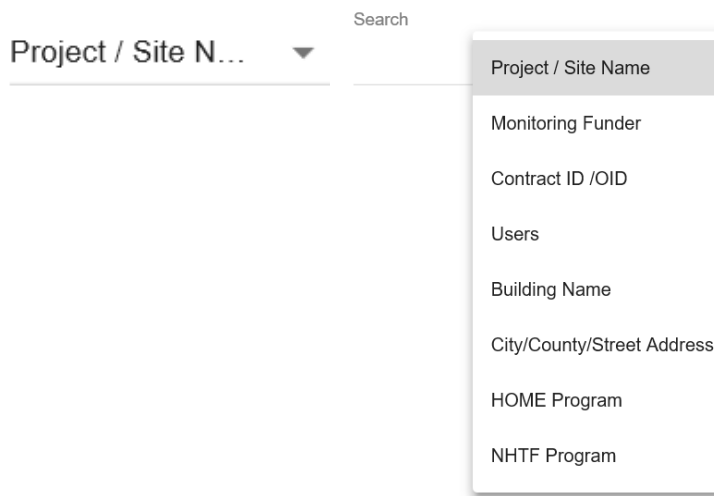
Step 1 - Click on the “🔍 search icon”



Step 2 – Type the project name in the search field. Once you type starting the system will predict the related projects and will show those in the drop-down list where you can select the required project from the list and the overall count of the projects will be shown as in the image below,



Step 3 – Click on the  drop down icon where the list of criteria for the search are shown and you can choose the required criteria. Let us take a close look into the 8 list of criteria mentioned and the search results will be according to the chosen criteria,



The Global Search and their criteria according to the user roles are,

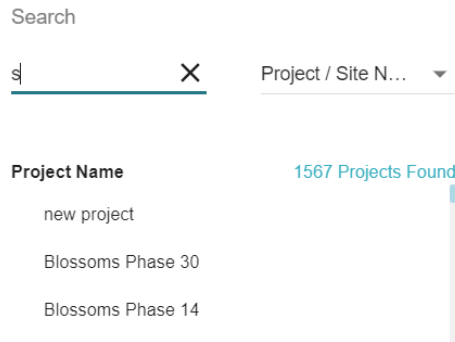
- Project / Alias / Site Name - All Users
- Monitoring Funder - All Users
- Contract ID /OID - Funders only
- Users - Funders only
- Building Name - All Users
- City/County/Street Address - All Users
- HOME Program -All Users
- NHTF HOME Program - All Users
- Monitoring Status - Funders only

6.1 Project / Site Name

If you choose “Project / Site Name” then the list of projects and sites in the WBARS system will be displayed based on the search criteria typed by you.

Example - If you type “s” in the search field by choosing “Project / Site Name” then the list of projects and sites with the relevancy to character “s” will be shown as the result. Let’s see the results for both Funder and Contractors / Managers

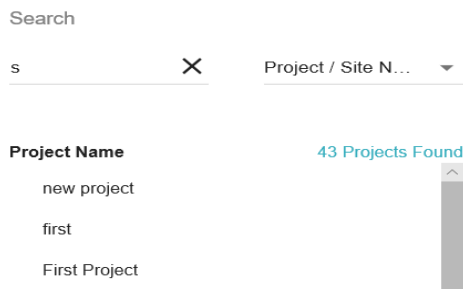
- Funders



The above screenshot shows the search results for typing character “s” in the search field and choosing the criteria “**Project / Site Name**” where the funders get to see the overall projects and site names having the alphabet “s” in it.

If you click on “**1567 Projects Found**” then the project listing page will be shown having all the relevant projects. If there are no projects relevant to the search, then you will be shown with a message “**No Projects Found**”


- Contractors / Managers

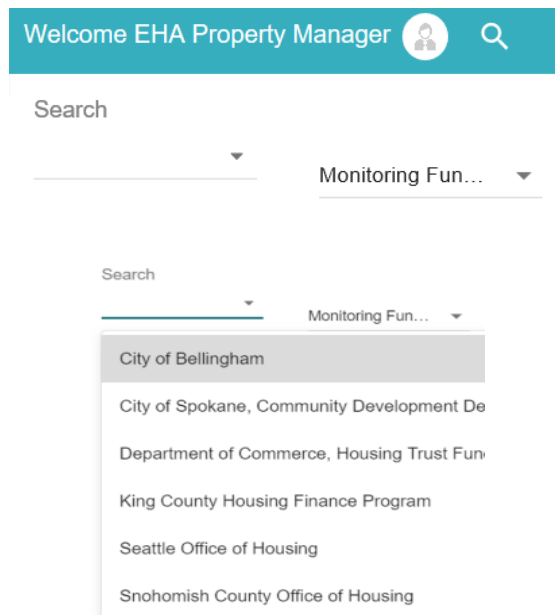


The above screenshot shows the search results for typing character “s” in the search field and choosing the criteria “**Project / Site Name**” where the **Contractors / Managers** get to see only the related projects and site names having the alphabet “s” in it.

If you click on “**43 Projects Found**” then the project listing page will be shown having all the relevant projects. If there are no projects relevant to the search, then you will be shown with a message “**No Projects Found**”

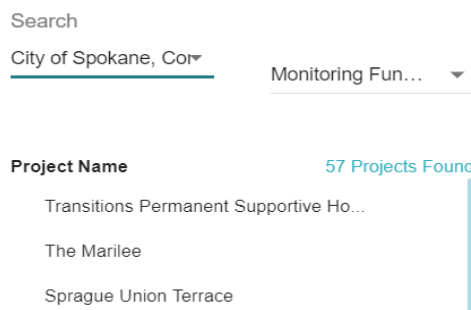
6.2 Monitoring Funder

If you choose “Monitoring Funder” the “Search” field gets a dropdown property added where you can search for the funder or choose the required funder from the dropdown list by clicking the  dropdown icon. Please refer the image below,



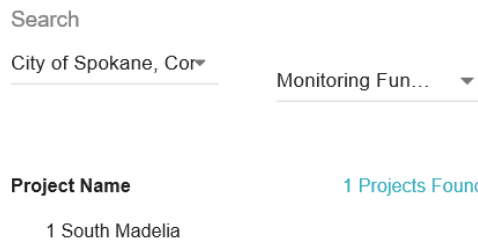
For Example – We have chosen “**City of Spokane, Community Development dept.**” in the search criteria for a “**Monitoring Funder**” and the search results for both for both Funder and Contractors / Managers is shown below

Funder



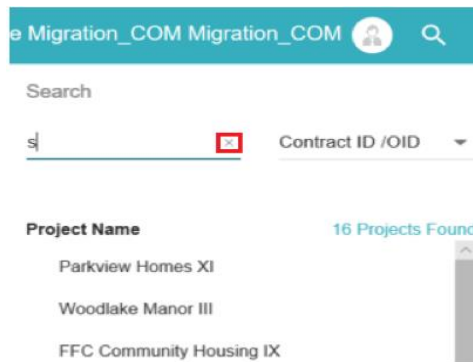
The **Funder** gets the results of the project names which has “**City of Spokane, Community Development dept.**” as the “Monitoring Funder” overall in the WBARS where they can click on the required project name and view the **project details**

Contractors / Managers



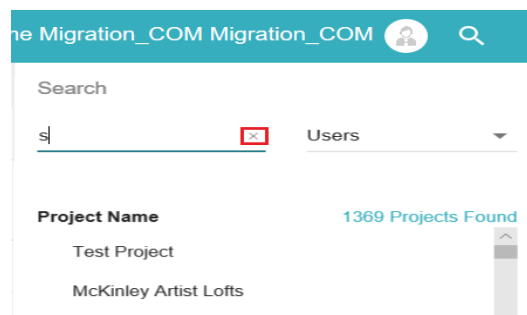
The **Contractors / Managers** get the result of the project names which has “**City of Spokane, Community Development dept.**” as the “Monitoring Funder” associated only to their organization = where they can click on the project name and view the **project details**

6.3 Contract ID / OID



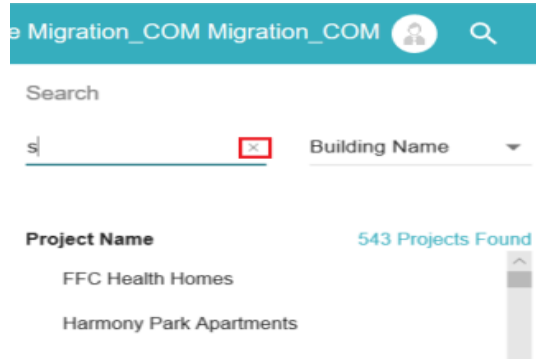
Choosing “Contract ID / OID” displays the project names with respect to the search criteria having the details of relevant contract id. The total count of the projects corresponding to the search and selected criteria will be shown in the list where you can click on the required from the list. If you want to clear the typed characters in the search field, click on **x** where the typed characters will be removed.

6.4 Users



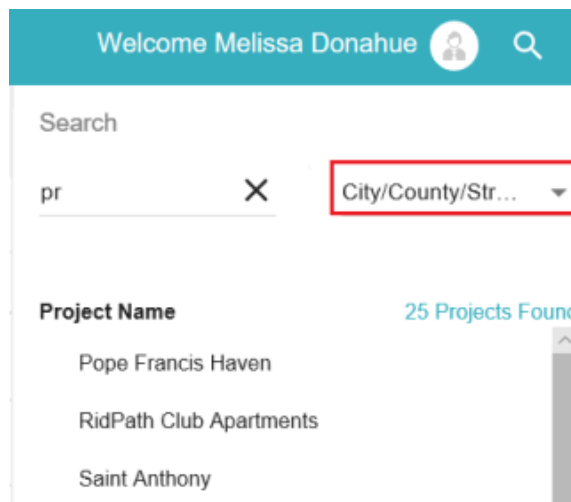
The “Users” can be selected if you want to view the projects based on the user name where you can type the name of the user in the search field and the related project list with the total project count will be shown as the result and you can choose the required project from the list.

6.5 Building Name



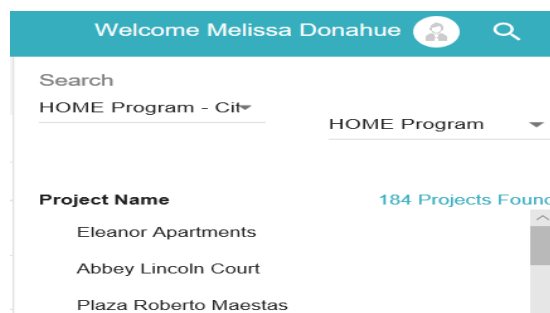
You can search having the building name where the projects related to that building name which you have type searched will be shown as the result with the total number of projects found in the WBAR system.

6.6 City / County / Street Address



If City / County / Street Address is chosen from the dropdown and set as the search criteria, then the search result will be the projects related to the search input having the total projects found in the system.

6.7 Home Program



If you choose the set the criteria as “Home program” then you will be provided with three options to choose in the search field. They are,

- HOME Program – City

- HOME Program – County
- HOME Program – State

You can select the required HOME program option and the relevant results will be shown.

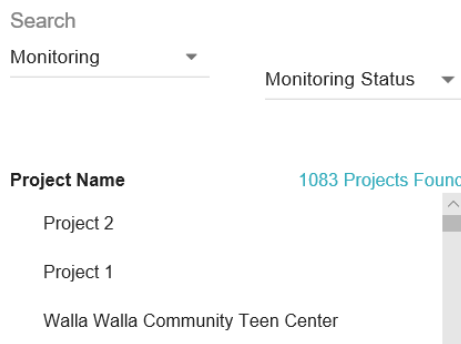
6.8 NHTF Home Program

If you choose the set the criteria as “NHTF Home program” then you will be provided with three options to choose in the search field. They are,

- NHTF Home Program – City
- NHTF Home Program – County
- NHTF Home Program – State

You can select the required NHTF Home program option and the relevant results will be shown.

6.9 Monitoring status



The screenshot shows a search interface with two dropdown menus: 'Search' (set to 'Monitoring') and 'Monitoring Status'. Below the filters, a list of project names is displayed: 'Project 2', 'Project 1', and 'Walla Walla Community Teen Center'. A search count of '1083 Projects Found' is shown in blue text. A vertical scrollbar is visible on the right side of the project list.

The projects can be searched by the monitoring status where you can set the search criteria as “Monitoring Status” and in the search field you can choose the type of status. There are four Monitoring status available. They are,

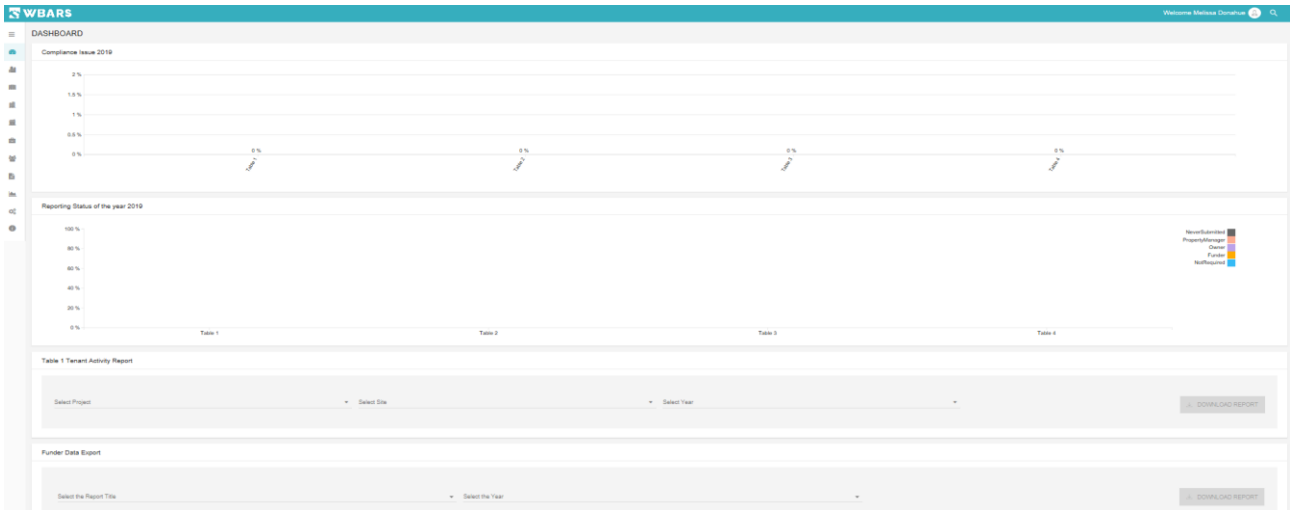
- Claimed
- Expired
- Monitoring
- Pending

You can choose the required monitoring type from the above where the projects will be shown in the search results accordingly.

Dashboard

The dashboard is the first page that you will see after login where it has the consolidated details to show. The dashboard view is different for a Funder and Contractor / Manager. Let's see the dashboards in detail.

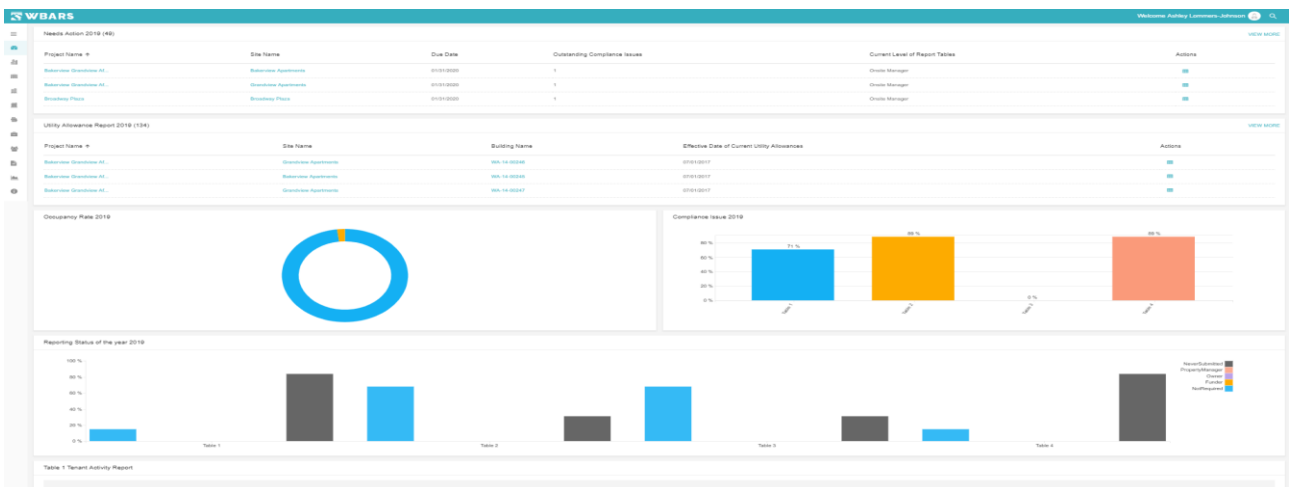
D1. Funder Dashboard



The Funder dashboard has the following sections,

- Compliance Issue 2019
- Reporting status of the year 2019
- Table 1 Tenant Activity Report
- Funder Data Export

D2. Contractor / Manager Dashboard



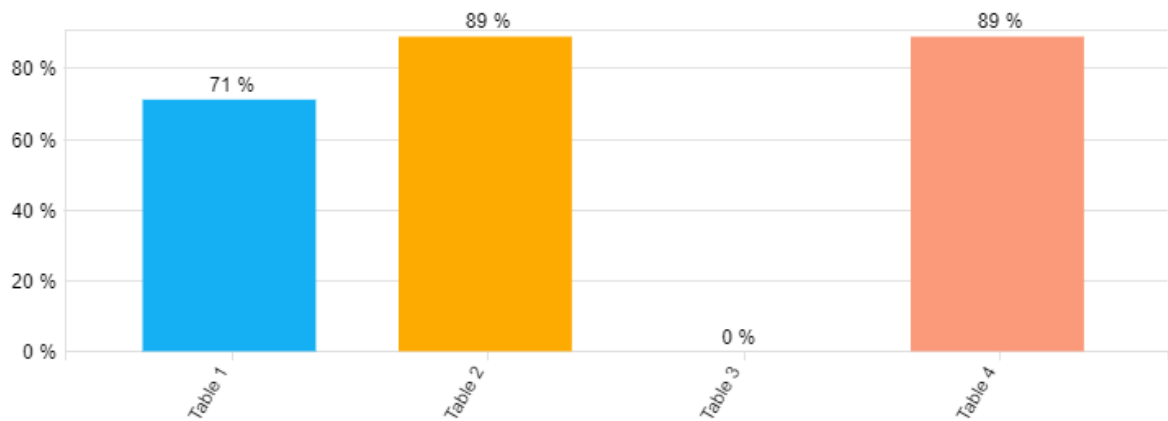
- Needs Action – The Projects that needs to attention for completion

- Utility Allowance Report 2019
- Occupancy Rate 2019
- Compliance issue2019 – A bar chart representation of the levels
- Reporting status of the year 2019– A bar chart expressing the yearly reporting status
- Table 1 Tenant Activity Report -To view the report

The projects related to the user login will only be displayed and only the Admin can view all the projects in the system. The list under each table can be sorted in ascending or descending order. Once clicked on the title you can see this icon which represents the order of the list.

D3. Compliance Issue

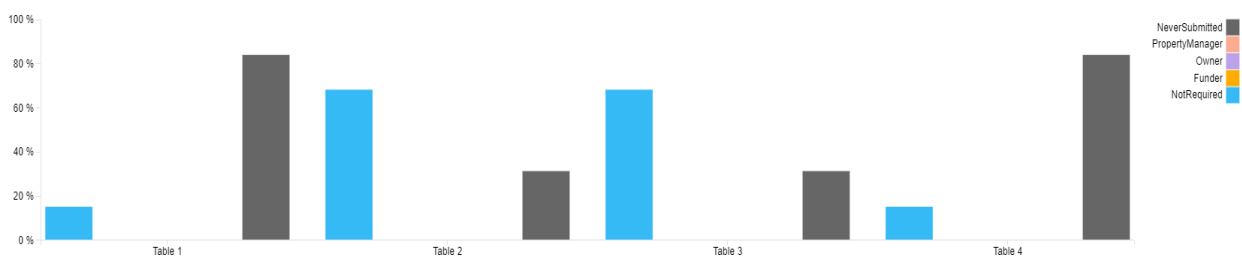
Compliance Issue 2019



The compliance Issue according to the Tables is shown in this graph where you can understand which table has how much levels of issues and you can act and resolve things accordingly. Each bar is differentiated with colours for better understanding of the compliance issue levels. If you place the cursor on the bar it will show you the reporting status percentage details of that table. The chart shows the issues of the year 2019. This is available for both Funder and Contractors / Managers.

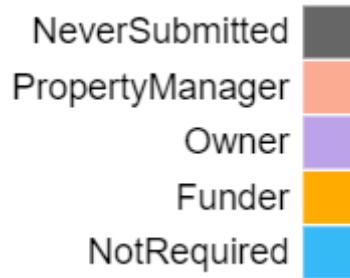
D4. Reporting Status of the Year 2019

Reporting Status of the year 2019



The reporting status of each table for the year 2019 is shown here in this chart where the bar shows the percentage with respect to the tables. Each bar has its own defined colours and the colour definition is shown at the top right corner of the chart. If you place the cursor on the bar it will show you the reporting status percentage details of that table.




Please refer the below image for colour and what they correspond to,



D5. Needs Action

Needs Action 2019 (49)

[VIEW MORE](#)

Project Name ↑	Site Name	Due Date	Outstanding Compliance Issues	Current Level of Report Tables	Actions
Bakerview Grandview Af...	Bakerview Apartments	01/31/2020	1	Onsite Manager	
Bakerview Grandview Af...	Grandview Apartments	01/31/2020	1	Onsite Manager	
Broadway Plaza	Broadway Plaza	01/31/2020	1	Onsite Manager	

The “Needs Action” section in the dashboard has the total projects which needs to be updated ie. which has the outstanding compliance issues. The table has the following details,

D5.1 Project Name

Project Name ↑

[Bakerview Grandview Af...](#)

[Bakerview Grandview Af...](#)

[Broadway Plaza](#)

The “Project Name” field has the list of projects where the user can click on the project name to view and access to edit / update that project details. The project name can be sorted ascending or descending order by clicking ↑

Here the projects are displayed according to the user login where you can see the projects associated with your organization.

D5.2 Site Name

Site Name
Bakerview Apartments
Grandview Apartments
Broadway Plaza

The “Site Name” has the list of all sites and the user can click on any site name in the list to view and access to edit / update the site details. Once you click on the site name the site details will be shown.

D5.3 Due Date

Due Date
01/31/2020
01/31/2020
01/31/2020

The “Due Date” is the final submission date for that project where the table reports, and the details should be updated and submitted to the funder before that date.

D5.4 Outstanding Compliance Issues

Outstanding Compliance Issues
1
1
1

The number of outstanding compliance issues is shown in this column corresponding to their project.

D5.5 Current Level of Report Tables

Current Level of Report Tables

Onsite Manager

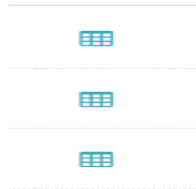
Onsite Manager

Onsite Manager

The current level of the report tables is shown here where the level at which the reports are there is the user who has access to edit and update the report tables. In the above image you can see onsite manager where he has the access to the report table and only he can update and move it to next levels of hierarchy.

D5.6 Actions

Actions



Clicking on “Actions” opens the reports page. You can view the reports page directly from the dashboard just by clicking on reports icon .

D5.7 View More / Hide

The screenshot shows the WBARS dashboard with the following data:

Needs Action 2019 (49)						
Project Name ↑	Site Name	Due Date	Outstanding Compliance Issues	Current Level of Report Tables	Actions	
Bakerview Grandview Af...	Bakerview Apartments	01/31/2020	1	Onsite Manager		
Bakerview Grandview Af...	Grandview Apartments	01/31/2020	1	Onsite Manager		
Broadway Plaza	Broadway Plaza	01/31/2020	1	Onsite Manager		

Utility Allowance Report 2019 (134)					
Project Name ↑	Site Name	Building Name	Effective Date of Current Utility Allowances	Actions	
Bakerview Grandview Af...	Grandview Apartments	WA-14-00246	07/01/2017		
Bakerview Grandview Af...	Bakerview Apartments	WA-14-00245	07/01/2017		

“View More” is placed at the top right corner in the “Needs Action 2019” and “Utility Allowance 2019”. If you want to view more table list view click on “View More” and it will extend the table list and shows a greater number of rows in the table. Clicking on “Hide” will bring back the default view as shown in the above screenshot.

For Example – If you click “View More” for “Needs Actions 2019” then the table will explain as shown in the image below,

Needs Action 2019 (49)

View of the page after clicking "View More"

Click here to bring the table back to normal view

Project Name ↑	Site Name	Due Date	Outstanding Compliance Issues	Current Level of Report Tables	Actions
<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	
Bakerview Grandview Af...	Grandview Apartments	01/31/2020	1	Onsite Manager	
Bakerview Grandview Af...	Bakerview Apartments	01/31/2020	1	Onsite Manager	
Broadway Plaza	Broadway Plaza	01/31/2020	1	Onsite Manager	
EHA Senior Housing Por...	Meadows Senior Apartme...	01/31/2020	1	Onsite Manager	
EHA Senior Housing Por...	Meadows Senior Apartme...		3	Onsite Manager	
EHA Senior Housing Por...	Lake Woods II Senior A...		3	Onsite Manager	
EHA Senior Housing Por...	Meadows II Senior		3	Onsite Manager	
EHA Senior Housing Por...	Lake Woods II Senior A...	01/31/2020	1	Onsite Manager	
EHA Senior Housing Por...	Meadows II Senior	01/31/2020	1	Onsite Manager	
EHA Senior Housing Por...	Meadows III Senior Apa...		3	Onsite Manager	

D6. Utility Allowance Report 2019

Utility Allowance Report 2019 (134)

[VIEW MORE](#)

Project Name ↑	Site Name	Building Name	Effective Date of Current Utility Allowances	Actions
Bakerview Grandview Af...	Grandview Apartments	WA-14-00246	07/01/2017	
Bakerview Grandview Af...	Bakerview Apartments	WA-14-00245	07/01/2017	
Bakerview Grandview Af...	Grandview Apartments	WA-14-00247	07/01/2017	

The utility allowance report of the year 2019 details can be managed here where Project Name, Site Name, View More, has the same actions as explained in **Needs Action**.

D6.1 Building Name

Building Name

WA-14-00246

WA-14-00245

WA-14-00247

The building names corresponding to the sites are shown here where you can click on the names of the building to view its details.

D6.2 Effective Date of current Utility Allowance

Effective Date of Current Utility Allowances

07/01/2017

07/01/2017


07/01/2017

The **Effective Date of current Utility Allowance** for each building is shown here.

D6.3 Actions

Actions

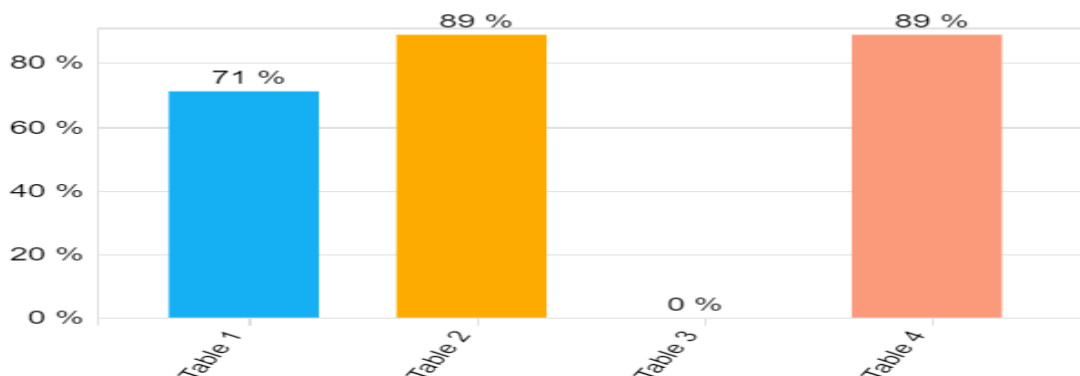


Clicking on “Actions” opens the Utility Allowance page. You can add the utility allowances for building directly from the dashboard just by clicking on reports icon  .

D7. Compliance Issue

The compliance issue is where the user needs to adhere with the system developed rules which is mandatory for the successful submission of the reports. The dashboard has the view of showing the percentage level of compliance issue which in a bar graph where the user understands the levels which needs to be addressed.

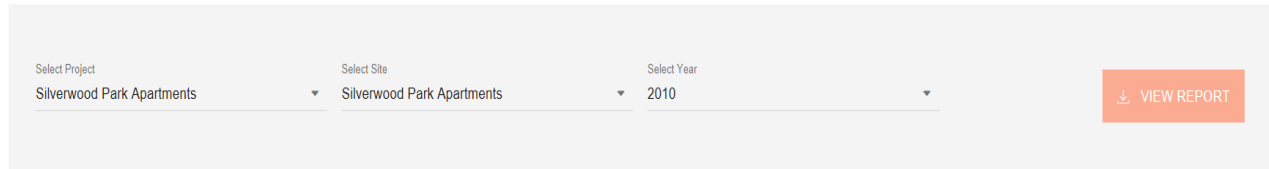
Compliance Issue 2019



D8. Table 1 Tenant Activity Report

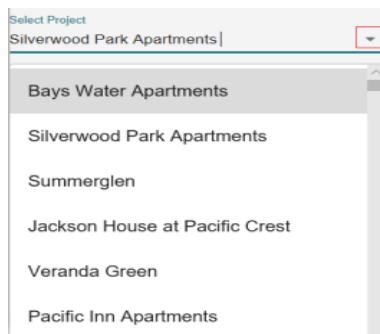
The report can be downloaded for the table 1 in the dashboard. Let see how we can download the report.


Table 1 Tenant Activity Report



The screenshot shows a form with three dropdown menus and a button. The first dropdown is labeled 'Select Project' and has 'Silverwood Park Apartments' selected. The second dropdown is labeled 'Select Site' and has 'Silverwood Park Apartments' selected. The third dropdown is labeled 'Select Year' and has '2010' selected. To the right of these dropdowns is an orange button with a download icon and the text 'VIEW REPORT'.

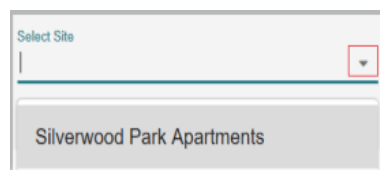
D8.1 Select Project




Clicking  (*Dropdown Icon*) shows the list of projects in the dropdown where the required project can be selected from the list and the list is scrollable depending upon the list length.

Choose the required project for which the report needs to be downloaded which can be selected from the dropdown.

D8.2 Select Site

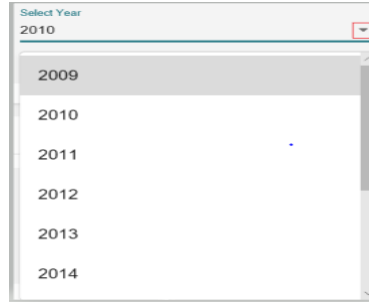



Clicking  shows the list of sites in the chosen project as a dropdown where the required project can be selected from the list and the list is scrollable depending upon the list length.

Once the project name is chosen the next step is to select the required site for which the report needs to be downloaded can be selected from the dropdown.

Note: The sites can't be selected without selecting a project

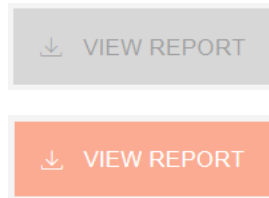
D8.3 Select Year



Clicking  shows the list of years for the chosen project as a dropdown where the required year can be selected from the list and the list is scrollable depending upon the list length.

Upon selecting the project name the required year for which the report is needed can be selected from the dropdown list.

D8.4 View Report

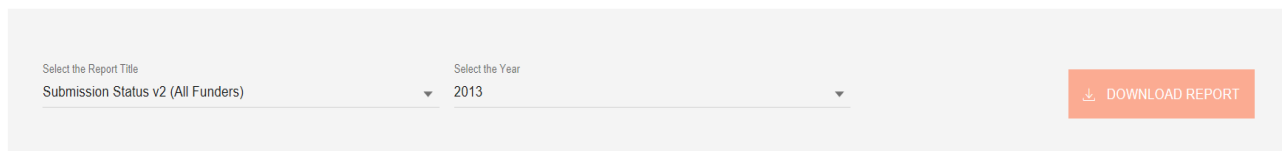


The selected project report can be downloaded by clicking on the button “View Report”. The button gets highlighted and available to be clicked for download only if the “Select Project” and “Select Year” are chosen if not the button remains unhighlighted as shown in the first image and following is the image of the button highlighted.

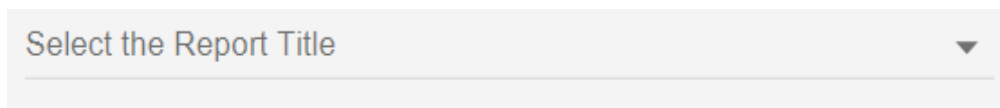
D9. Funder Data Export

The funder data export is where the user will select the report title and the year to download the report.

Funder Data Export



D9.1 Select the Report Title




The list of reports available will be shown in the dropdown and the user can select the required report. The report titles are,

- Table 2 – 4 Report Summary
- Table 1 – Export All for Year

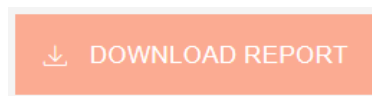
D9.2 Select the Year



Clicking  shows the list of years for the chosen project as a dropdown where the required year can be selected from the list and the list is scrollable depending upon the list length.

Upon selecting the project name the required year for which the report is needed can be selected from the dropdown list.

D9.3 Download Report



The report can be downloaded by clicking on the “Download Report” button. The button will be enabled to access only if the fields “Select the Report Name” and “Select the Year” are selected.

Projects

The projects page shows the list of all projects where you can click on the “Project Name” to view its details. The projects are shown based on the user login where the contractors / Managers can view only their related projects and the Funder can view the list of all projects in WBARS.

P.1 Projects Page View based on User Types

The projects page is different for a Funder and a Contractor / Manager. The screenshot of the page for both is shown below,

P1.1 Funder

Name ↑	Owner Organization	Owner Contact Name	Management Company	Contract ID / OID	Funder Contact	Monitoring Status	Fun
1 South Madelia	Everett Housing Author...	Ashley Lommers-Johnson	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	Monitoring	WS CSC
12th Avenue Arts	Capitol Hill Housing	Christopher Persons	Capitol Hill Housing	12-100Aq, 7171	Migration_COM Migratio...	Monitoring	WS
13 West Apartments	Everett Housing Author...	Ashley Lommers-Johnson	Everett Housing Author...	15-99A	Migration_COM Migratio...	Monitoring	WS
15 West Apartments	DBG Properties LLC	Skip Grodahl	GSL Properties Inc.	14.46A	Michael Dill, Migratio...	Claim	WS
22 North	Opportunity Council	Wendy Lawrence	Opportunity Council	17-13	Michael Soper, Lisa Ma...	Claim	WS
2500 E Union	YWCA of Seattle-King C...	Anna Preyapongpisan	Everett Housing Author...	3723	Migration_WSHFC Migrat...	Pending	WS
30 Bellevue	Imagine Housing	Villette Nolon	Quantum Residential In...		Marji Johnson	Claim	WS
33 Oakes	Everett Housing Author...	Steve Yago			Migration_WSHFC Migrat...	Claim	WS
33 Rucker Apartments	Everett Housing Author...	Steve Yago			Ken Katahira	Claim	SNK
3904 MLK Way	SouthEast Effective De...	Lance Matteson	Coast Property Managem...	3390, 99-172A	Michael Dill, Migratio...	Claim	WS
410 Apartments	Capitol Hill Housing	Christopher Persons	Capitol Hill Housing	3401	Migration_WSHFC Migrat...	Claim	WS


Displaying 1 to 11 of 1918 records

P1.2 Contractor / Manager

Name ↑	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Funders	Total Sites	Totz
1 South Madelia	Everett Housing Author...	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	WSHFC COMMERCE KC CSCD	1	7
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100Aq, 7171	Migration_COM Migratio...	WSHFC COMMERCE SOH	2	1
13 West Apartments	Everett Housing Author...	Everett Housing Author...	15-99A	Migration_COM Migratio...	WSHFC COMMERCE KC	1	1
2500 E Union	YWCA of Seattle-King C...	Everett Housing Author...	3723	Migration_WSHFC Migrat...	WSHFC COMMERCE SOH	2	1
33 Oakes	Everett Housing Author...			Migration_WSHFC Migrat...	WSHFC SNO COUNTY	0	0
33 Rucker Apartments	Everett Housing Author...			Ken Katahira	SNO COUNTY	0	0
60 Project	Everett Housing Author...			Nona White	COMMERCE	1	0
Abbey Lincoln Court	Everett Housing Author...	Everett Housing Author...	15-81A, 7105	Migration_KC Migration...	WSHFC SOH KC	1	1
Apr Project	Everett Housing Author...	Everett Housing Author...		Nona White	COMMERCE	1	2
Auto Project	Everett Housing Author...			Nona White	COMMERCE	1	0
Bakerview Grandview Af...	Everett Housing Author...	Everett Housing Author...	14-79A	Marji Johnson	WSHFC	2	61

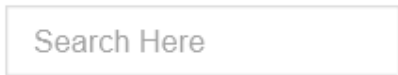
Displaying 1 to 11 of 79 records

P.2 How to view projects list?

To view the projects list, you can click on the “**Projects**” icon  under the menu and the projects listing page “**All Projects**” will be shown. You can scroll the projects list and you can search for the required project. The screen shot of the projects page is shown below,

Name ↑	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Monitoring Status	Funders	Total Sites
1 South Madelia	Community Frameworks	Spokane Housing Ventur...	16-06	Paul Trautman, Chrysta...	Monitoring	WSHFC COMMERCE CSCD	1
12th Avenue Arts	DBG Properties LLC	Capitol Hill Housing	12-100A	Cheryl Cohen, Shawna H...	Monitoring	WSHFC COMMERCE SOH	1
13 West Apartments	DBG Properties LLC	GSL Properties Inc.	15-99A	Chrystal White	Monitoring	WSHFC	1
15 West Apartments	DBG Properties LLC	GSL Properties Inc.	14-46A	Michael Dill	Monitoring	WSHFC	1
1811 Eastlake Supporti...	Downtown Emergency Ser...	Downtown Emergency Ser...	04-36	HFP Asset Management, ...	Monitoring	WSHFC COMMERCE SOH KC	1
18th Ave Apts	Capitol Hill Housing	Capitol Hill Housing		Cheryl Cohen, Complian...	Claim	COMMERCE SOH	1
1st Street Apartments	Vancouver Housing Auth...	Quantum Residential In...	13-96A	Marji Johnson, Complia...	Monitoring	WSHFC COMMERCE	1
22 North	Opportunity Council	Opportunity Council	17-13	Michael Soper, Lisa Ma...	Monitoring	WSHFC COB	1
2500 E Union	YWCA of Seattle-King C...	YWCA of Seattle-King C...		Cheryl Cohen	Claim	SOH	1
2nd Street Home	Peninsula Community Me...	Peninsula Community Me...		Compliance Asset Manag...	Claim	COMMERCE	1

P.3 How to search for a Project?

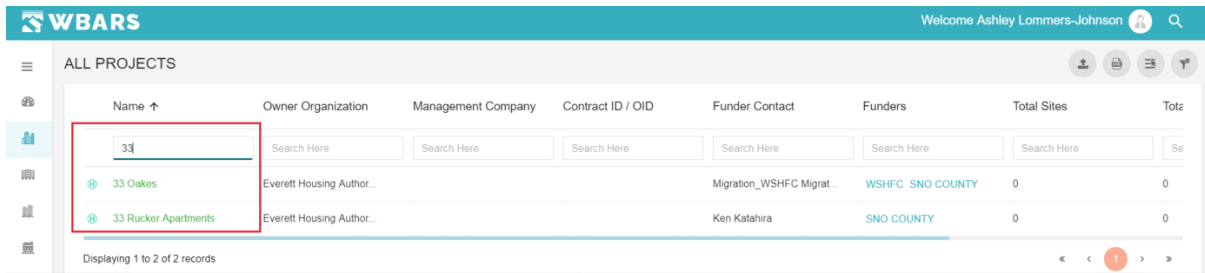


The above image is the search field where you can search for a project by using any portion of the project name. Type the name in the search field and the related projects associated with your input will be shown.

For example – If you type “33” in the search field the system would return all the project name having “33” as result


The below images show you where you can type the project name to search and the result achieved for the above example.

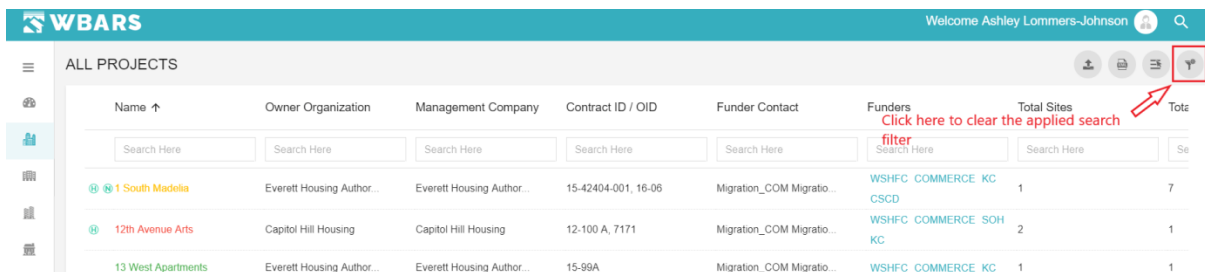
Name ↑	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Funders	Total Sites	Total
1 South Madelia	Everett Housing Author...	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	WSHFC COMMERCE KC CSCD	1	7
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100Aq, 7171	Migration_COM Migratio...	WSHFC COMMERCE SOH	2	1



Make sure that the entered search filter is cleared as these will unnecessarily constrain all subsequent search results.



P.4 Clear Filter

The “Clear Filter” is used to clear the search filter criteria. You can click  on this icon where it clears the text typed in the search field. This icon is located at the top right corner of the page. The below image shows where the clear filter icon is located.



P.5 How to Sort the Projects list?



Each column can be sorted in ascending or descending order by clicking on the column name. once you click on the column name you can see one   these icons next to the column name which denotes the sorting.

Please see the below images for better understanding on how the sort option works.

Image 1 – The below image shows the list view by default before sorting. You can see “1 South Madelia” which is place on top of the list

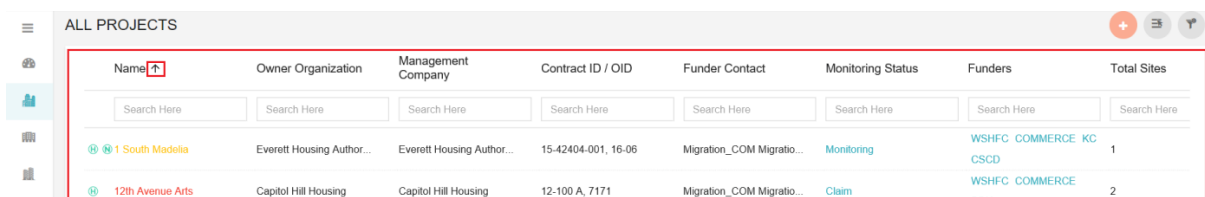


Image 2 – Click on the column Title For example – Click on **“Name”** and the sorting is changed. In the previous image it showed **“1 South Madelia”** and now its showing **“Zeigen House”** where the sorting placed the last project name on top.

Name	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Monitoring Status	Funders	Total Sites
Zeigen House	Compass Health	Coast Property Managem...	5-92-491-11B, HTF 1993	Ken Katahira, Complian...	Claim	COMMERCE SNO COUNTY	1
YWCA Snohomish Portfol...	YWCA of Seattle-King C...	YWCA of Seattle-King C...	17-108A.C	Erik Giesen	Claim	WSHFC SNO COUNTY	3

The sorting can be done by clicking on any column name where the order of the listing will change accordingly.

P.6 How to view a project detail?

To view a project detail, you need to click on the **“Project Name”** which shows the details of that project.

For example – If you are looking for the details of the project **“1 South Madelia”** you can click on it from the list where the system shows its information.

Step 1

Name	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Funders	Total Sites	Total
1 South Madelia	Everett Housing Author...	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	WSHFC COMMERCE KC CSCD	1	7
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100 A, 7171	Migration_COM Migratio...	WSHFC COMMERCE SOH KC	2	1

Step 2 – The project details page having the details of **“1 South Madelia”** is shown

GENERAL		FUNDERS		SITES		REPORTS	
Name *	1 South Madelia	Total Sites	0	Total Bldgs	7	Total Units	44
Address				City	Spokane	State	AL
				Zip Code			99202
Contractor/Owner *	Everett Housing Authority	Address	PO Box 1547	City	Everett	State	WA
				Zip Code			98206-1547
Owner Contact Name *	Ashley Lommers-Johnson	Address	PO Box 1547	City	Everett	State	WA
				Zip Code			98206-1547
Phone Number	425-256-9222		Email to	prabhu@intellectyx.com			

P.7 Select the Columns

The columns shown in the project listing page **“All Projects”** can be customized by clicking select the column icon . This icon is placed at the top right corner and the below image shows the icon location,

Name ↑	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Funders	Total Sites	Total
1 South Madelia	Everett Housing Author...	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	WSHFC COMMERCE KC CSCD	1	7
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100 A, 7171	Migration_COM Migratio...	WSHFC COMMERCE SOH ...	2	1

P.7.1 How does Select the columns work?

There are several columns shown in the below image and the user can customize the columns based on his needs where only the columns selected by him will be shown,

Name ↑	Owner Organization	Management Company	Contract ID / OID	Funder Contact	Funders	Total Sites	Total
1 South Madelia	Everett Housing Author...	Everett Housing Author...	15-42404-001, 16-06	Migration_COM Migratio...	WSHFC COMMERCE KC CSCD	1	7
12th Avenue Arts	Capitol Hill Housing	Capitol Hill Housing	12-100 A, 7171	Migration_COM Migratio...	WSHFC COMMERCE SOH KC	2	1

Let’s see the step by step process on how “Select the Column” works,

Step 1 – Click on “Select the columns”

Step 2 – “Show/Hide Columns” will be shown to select the columns where you can click on the checkbox to select the required columns.

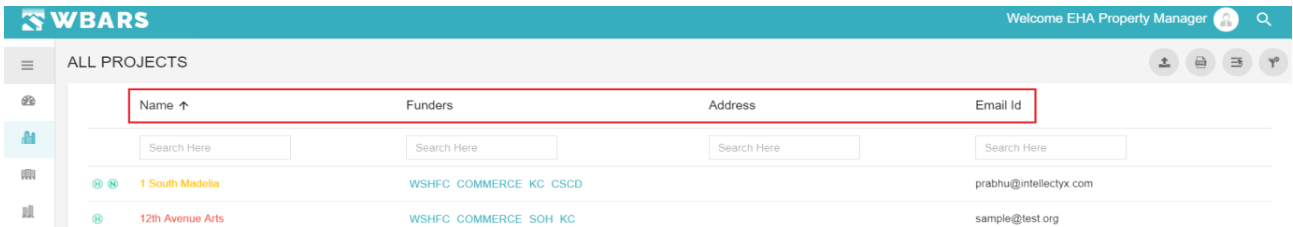
For Example – Let’s choose Name, Funders, Address and Email ID shown in the image below.

Show/Hide Columns

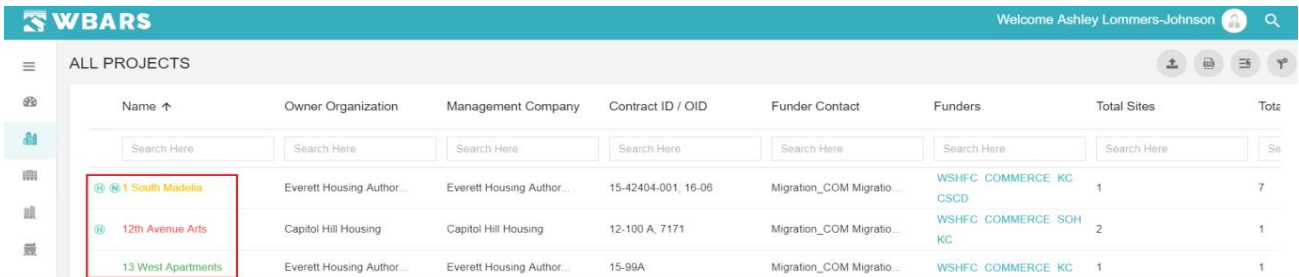
<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Owner Organization	<input type="checkbox"/> Owner Contact Name	<input type="checkbox"/> Management Company
<input type="checkbox"/> Contract ID / OID	<input type="checkbox"/> Funder Contact	<input type="checkbox"/> Monitoring Status	<input checked="" type="checkbox"/> Funders
<input type="checkbox"/> Total Sites	<input type="checkbox"/> Total Buildings	<input type="checkbox"/> Total Units	<input type="checkbox"/> Project City
<input type="checkbox"/> Project County	<input checked="" type="checkbox"/> Address	<input type="checkbox"/> Project State	<input type="checkbox"/> Project ZipCode
<input type="checkbox"/> Phone Number	<input checked="" type="checkbox"/> Email Id		

SAVE **CANCEL**

Step 3 – Click on “Save” where only the selected columns will be shown. As we have selected Name, Funders, Address and Email ID only these 4 columns will be shown as in the image below.



P.8 Why the Project Names are in different colours and what do they convey?



In the project listing page, you can notice project names are in different colours where each colour represents the validation stages. You can get to know the details on colour and their representation in Validations.

P.9 What does the icon near the project name denotes?

You can see either of these or both icons placed at the left side of the project name which denotes the Projects “Set Aside Types”.

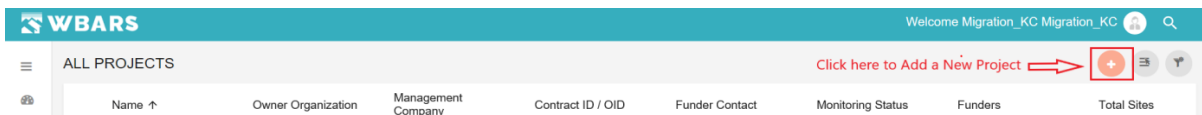
- Homeless
- NHTF Program

If the projects belong to the above-mentioned set aside types then the project names will have the respective icon representing it.


P.10 Add a Project

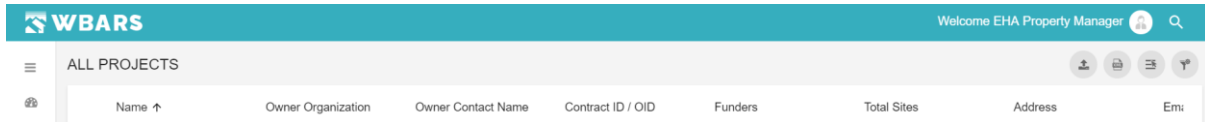
Funders

Only the Funders have the access to add a project. The projects can be added to the WBARS by clicking the “Add” icon . The icon location is shown in the Image below,




Contractors / Managers

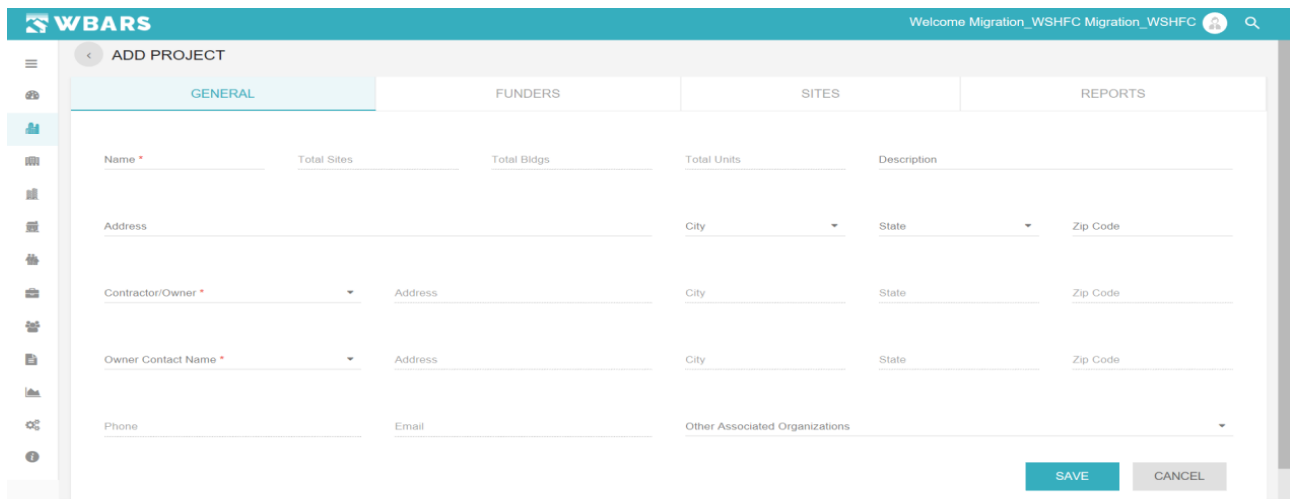
Contractors / Managers can't add a project as their interface will have no option and they have no permission to add a project. In the image below you can see that there is no Add  icon available. The below image is the screenshot of a Contractors / Managers Projects page.



Let's see the step by step process to add a project in to WBARS explained below,

Step 1 – Click on “Add” 

Step 2 – The page to add the project details will be shown as in the image below



The “Add Project” page has four sections. They are,

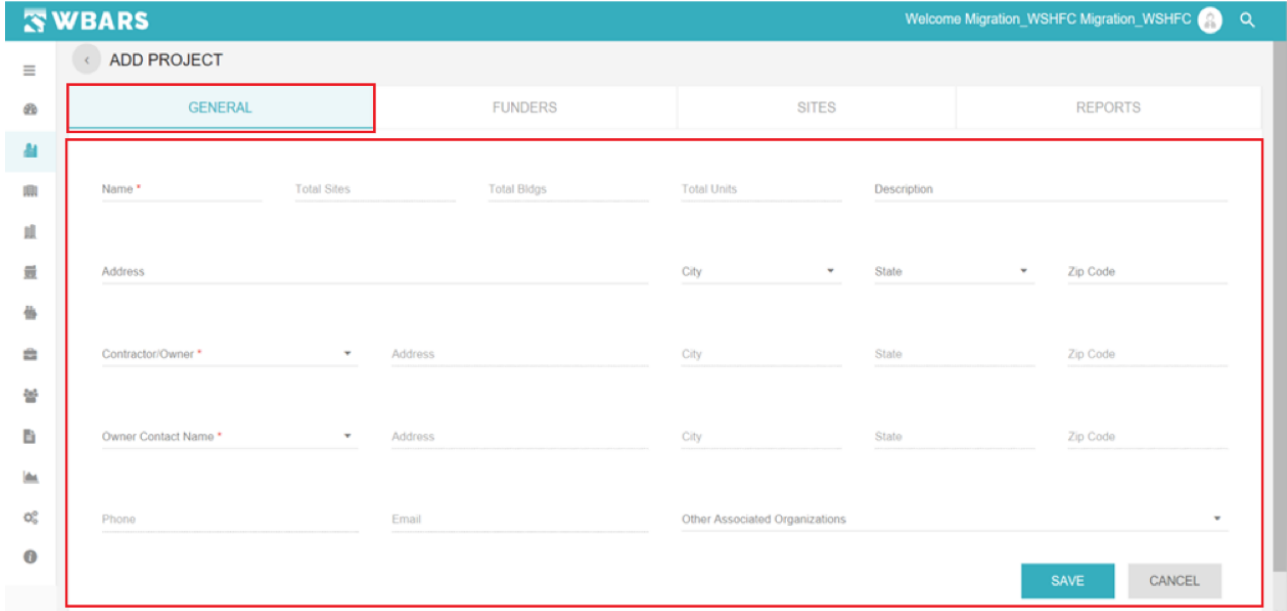
- General
- Funders
- Sites
- Reports

FYI – The fields “Funders / Sites / Reports” will get enabled only after the “General” field is updated and saved. If you click on any of these its page will not be shown until you add the general details of the project.

P.10.1 General



The general section has the project generic fields where the user needs to enter the required details. The fields mentioned with * are mandatory where the user need can't save the project without providing details in the fields which are mandatory. The screenshot of the general section is shown below,



G1. Name

Name *

The project name should be entered in the name field. Click on the field to type the project name.

G2. Description

Description

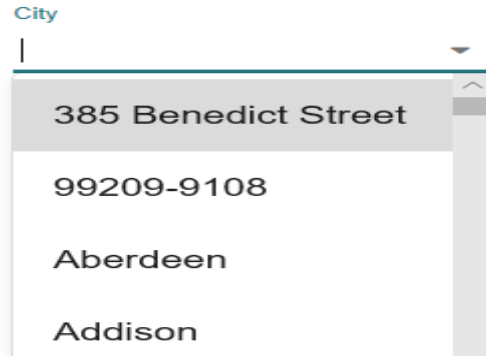
The project description should be entered in this field. You can enter the details of the project if any in the description section and this is a non-mandatory section where you can save the project without providing any details here.

G3. Address

Address

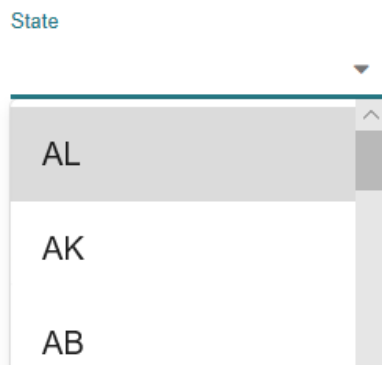
The project location is entered in the address field. Click on the field to type the address and this is a non-mandatory section where you can save the project without providing the details here.

G4. City



The list of city names will be shown in the dropdown list where you can choose the city of the project which you are creating or you can type the city name in the field and the relevant cities matching your search input will be shown and you can choose the required city just by clicking on the name. If you give wrong inputs in the field, you will shown “**No Options**” to choose.

G5. State



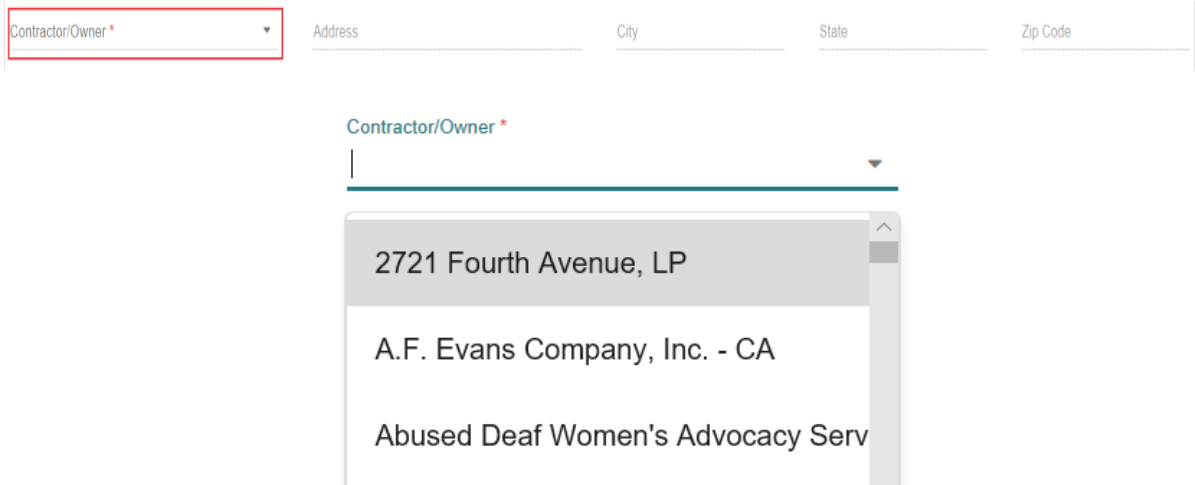
The list of state names will be shown in the dropdown list where you can choose the state of the project which you are creating or you can type the state code in the field and the relevant states matching your search input will be shown and you can choose the required state just by clicking on the name. If you give wrong inputs in the field, you will shown “**No Options**” to choose.

G6. Zip code

Zip Code

Enter the valid zip code of the state here in this field.

G7. Contractor / Owner



The list of Contractor / Owner organization is chosen from the dropdown list. You can click on the field where the dropdown list having the overall organizations will be listed down from which you can choose the Contractor / Owner organization of the project which is being created. Once the Contractor owner is chosen the following fields will be auto filled,



- Address
- City
- State
- Zip Code

G8. Owner Contact Name



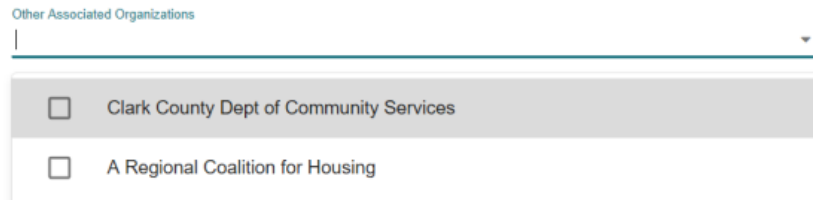
Each organization have their own list of contact / Owner from which the person name can be chosen who will be the owner contact of the project created. You can click on the field where the list of owner contacts for the chosen organization is shown to choose.

Once the owner contact name is chosen the following fields will be auto filled



- Address
- City
- State
- Zip Code

G9. Other Associated Organizations



The “**Other Associated Organizations**” is a field that provides you the option to add one or more associated organizations for the created project. Once you click on this field the dropdown list having the organization name will be shown with checkbox where you can choose multiple associated projects by clicking the checkbox.

G10. Non-Editable Fields

Total Sites

Total Bldgs

Total Units

Phone

Email

The following fields are non- editable fields where the access is granted for the project property manager. The non-editable fields are,

- Total Sites
- Total Buildings
- Total Units
- Phone
- Email

G11. Save / Cancel

SAVE

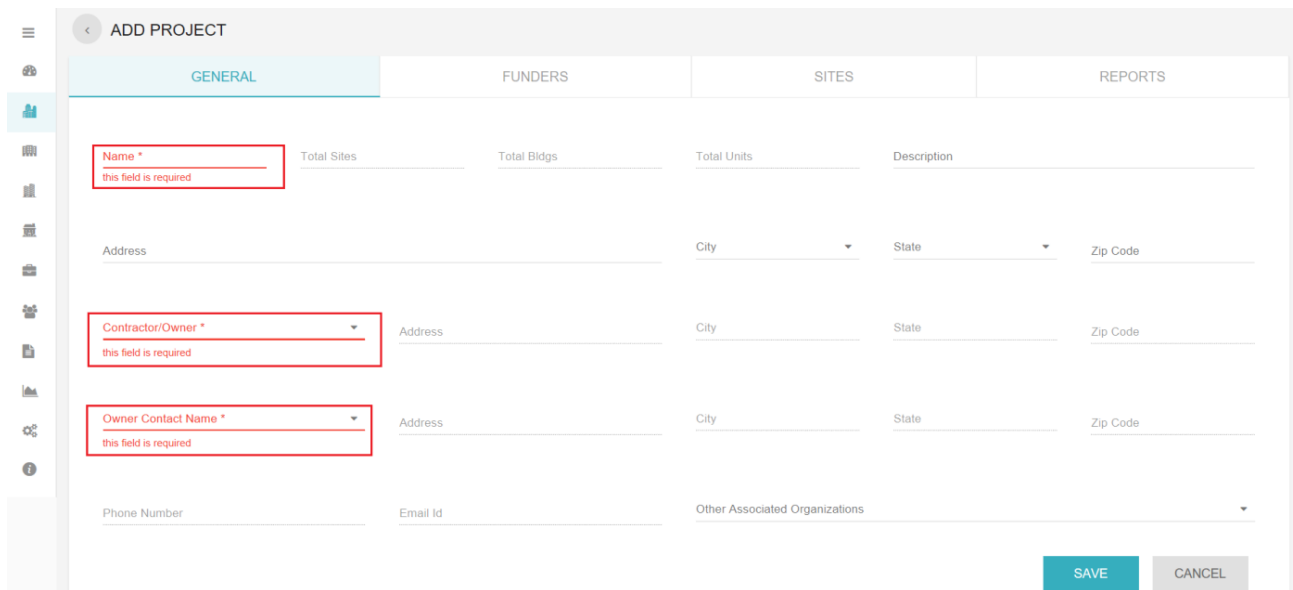
CANCEL

After entering all the details required you can click on “**SAVE**” where all the details entered will be saved showing the notification “**Project Created Successfully**” and the project listing page will be shown where you can see the project which you have created. If you couldn’t see you can search by tying the project name in the “Search Here” field and you can click on the project name to view the

project details and now you will have the access for the following fields (**Funders / Sites / Reports**) as mentioned above.

You can click on the “**CANCEL**” button if you don’t want to proceed with the new project creation. Once you click “**CANCEL**” the system will take you back to the dashboard.

If you try to save the project without providing any details in the GENERAL section then you will be shown with the warning message as shown in the image below,



P.10.2 Funders

Once the “**General**” section of the project is saved and the project is created you will have the access to “**FUNDERS**” section.

- Any Funders from the funding organization have the rights to edit the Funder Settings Page
- Read Only Funders doesn’t have rights to edit the Funder Settings Page

Once you click on the **FUNDERS** tab you will shown with the page as shown in the image below,

Here you will provide the “**Project Expiration Date**” and choose the “**Project Type**”. Where the “**primary contact on project**” will have the name of the funder who created the project.

F1. Primary Contact on Project

The primary contact is the name of the funder who created the project which will be shown by default and you can assign the project to other funders in your organization.


Note – If you are changing the primary contact, make sure that you assign the project to “**Active**” Funders. You can see this “*” symbol before the names which means that those funder users are “**Inactive**”. Refer the screenshot below to identify the user status,


F2. Subsidy Commitment Text

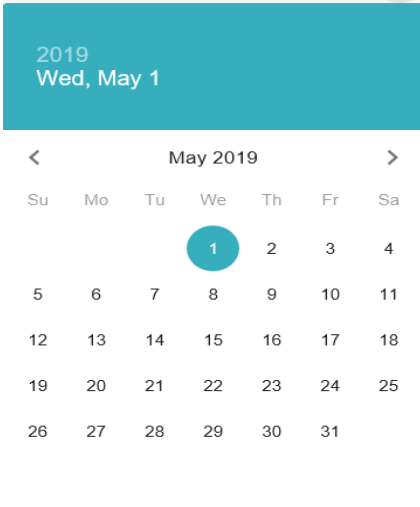
Subsidy Commitment Text

This is a non-mandatory field and you can enter the subsidy commitment if any.


F3. Project Expiration Date

Project Expiration Date *
05/01/2019 
mm/dd/yyyy (e.g 01/01/1991)

Project Expiration Date *
05/01/2019 



2019 Wed, May 1						
May 2019						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

The project expiration date should be provided, where you can type the date in mm/dd/yyyy format, or you can click on the calendar  icon to choose the date from the calendar.

F4. Project Type

Project Type: *



Choose the project type from the list shown in the dropdown. There are 3 option shown for you. They are,

- None
- Elderly Project
- ARRA Project

The above options are multi select where you can choose None as a single choice and the other two has a multi choosing availability. The screenshot of the options is shown below,

None

Elderly Project

ARRA Project

F4.1 Elderly Project

- 1) Upon activating the Elderly Project as the project type the it will insert an Elderly record in Tax Credit section.
- 2) On Funder Set Aside Report Elderly column shows “Yes” if this is chosen

F4.2 ARRA Project

This Is applicable only for **WSHFC** Funder.

Upon selecting the ARRA, a combo selection will visible with two choices

1. 1602 Exchange
2. TCAP

Funder can select either one of the selections and save. The screenshot upon choosing “ARRA Project” is shown below,

The screenshot shows the WBARS interface for a project under the 'FUNDERS' tab. The primary contact is Melissa Donahue. The 'ARRA' dropdown menu is open, showing three options: 'None', 'Elderly Project', and 'ARRA Project'. The 'ARRA Project' option is selected and highlighted with a red box. The 'Project Expiration Date' field is also highlighted with a red box. The 'SAVE' and 'CANCEL' buttons are visible at the bottom right.

F5. Note

Note

You can add any notes to the project of required and this is the last field in this section which you can see at the bottom above the save button.

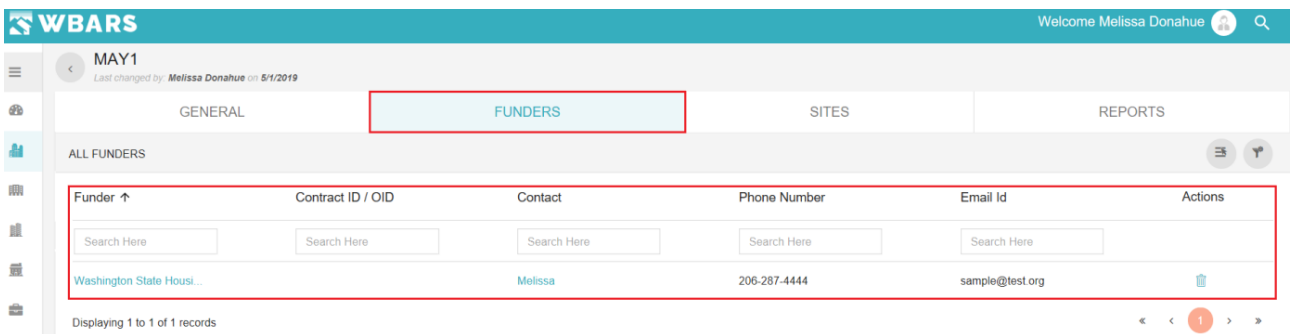
F6. Save / Cancel



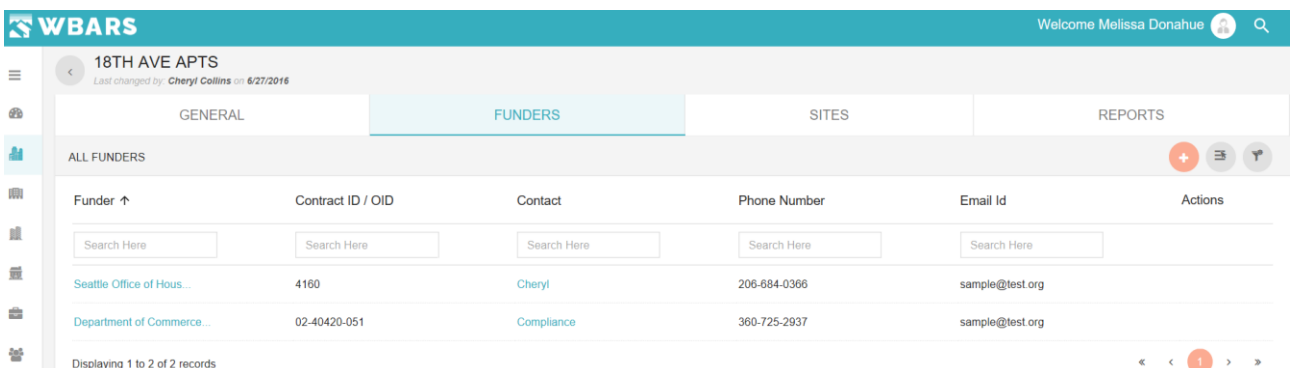
After entering all the details required you can click on “**SAVE**” where all the details entered will be saved. Once the Project Level Settings are saved the **Monitoring Status** will be updated as Monitoring in Project Search and Project Details page.

After you click on **SAVE** you will be moved to “ALL FUNDERS” page where the list of funders associated with the project will be shown. If you are the only funder then your page will be as of in the screenshot below,

The funders section has the list of funders associated to the project. All the monitoring funders will be listed in this page and the funder who is creating the project is considered as the “**Monitoring Funder**” to the project. The organization name will be displayed by default having their list of contacts associated with the organization.




If you are opening the project which you aren't associated with then your page will be as of in the screenshot below,



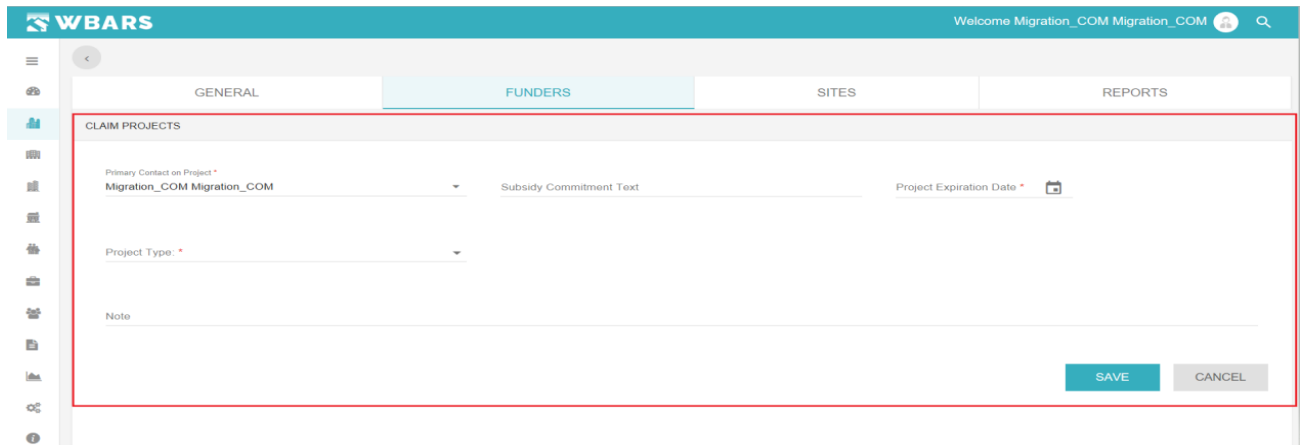
From the above two screenshots the difference is, you will have the option to “**Claim Projects**” if you aren’t associated with. You can claim the project if the project is associated with your organization only.

F7. Claim Projects

The project can be claimed only once by the admin where the name of the funder gets displayed in the section after saved. Here we explain the steps to claim the projects.

Step 1 - Click on the **Add**  button

Step 2 - The “Claim Project” page will open. The screenshot of the page is shown and explained below.



F7.1 Primary Contact on Project



The “*Primary Contact on Project*” is a dropdown field, once you click on the field the dropdown list having the contact names associated to the login will be shown where you can choose the contact by clicking on the name.

FYI – There will be a * symbol in front of the name which denotes that the contact is currently inactive. Choose the contact which has no * symbol so that the

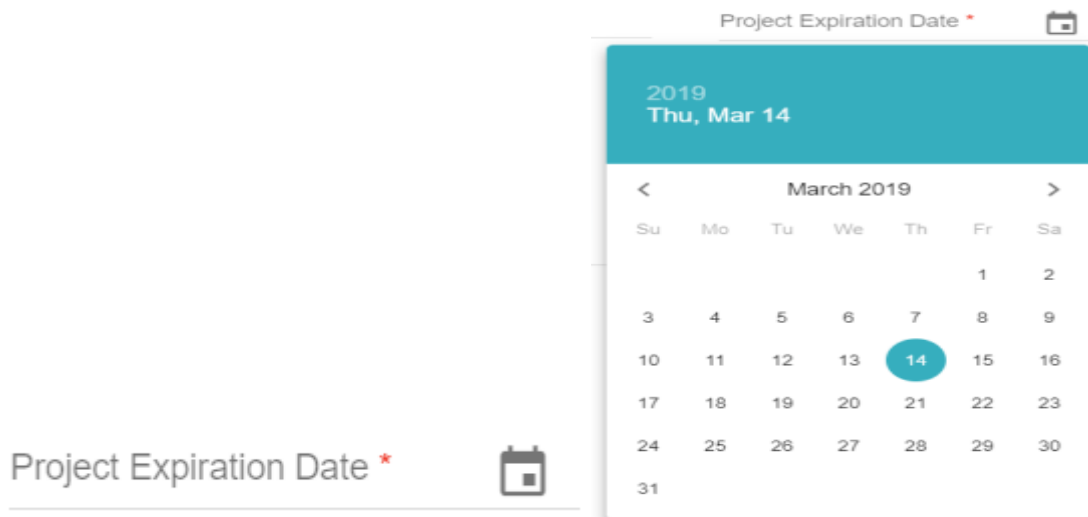
F7.2 Subsidy Commitment Text


Subsidy Commitment Text

Condition

- Non-Mandatory field. The changes can be saved without editing this field

F7.3 Project Expiration Date



To set the project expiration date you can click on the calendar icon  to set the project expiration date. If you proceed to save without entering this field a warning message will be shown as in the image below.



Condition

- (*) Mandatory Field and the fields can't be saved without entering the field

F7.4 Project Type

Project Type: *

None

Elderly Project

There are 2 types of project type available to choose. They are,

- None
- Elderly Project

Where you can choose the required by clicking on the check box where once the option is chosen the check box would look like this . If you proceed to save without entering this field a warning message will be shown as in the image below.



Condition

- (*) Mandatory Field and the fields can't be saved without entering the field

F7.5 Note



The note is a text field

Condition

- Non-Mandatory field. The changes can be saved without editing this field

F7.6 Save / Cancel



You can save or cancel the changes. If you click on the "SAVE" button the changes made will be saved and the Funders page will be opened with the newly added funder listed in the page or if "CANCEL" button is clicked the page will land back to Funders page.

F8. Funder Settings

You can click on the Funder name under the funder list to view the funder settings and you can have access to edit if you are the funder of the project. Refer the screenshot below on how to view the funder settings,

WBARS | Welcome Melissa Donahue

MAY 1 | Last changed by: Melissa Donahue on 5/1/2019

GENERAL | **FUNDERS** | SITES | REPORTS

ALL FUNDERS

Funder ↑	Contract ID / OID	Contact	Phone Number	Email Id	Actions
Washington State Housi...		Melissa	206-287-4444	sample@test.org	

Displaying 1 to 1 of 1 records

Once you click on the Funder Name the Funder settings page will be shown as in the image below,

WBARS | Welcome Mjgalek, COM Migration, COM

COMMERCE 1 SOUTH MADEIRA | Last changed by: Mjgalek, COM Migration, COM on 5/1/2019

GENERAL | **FUNDERS** | SITES | REPORTS

Project Name: Compliance Asset Management | Subtype: Subtype Commitment Text | Project Location: 01012008

Project Type: None

Reporting Forms

Site: 1 South Madeira | Site Key: 10106 | Contract OOID: 15-4204-001 | First Reporting Year: 2018

Report Table	2018	2019	2020
Table 1	1/1/2019	1/1/2020	1/1/2021
Table 2	1/1/2019	1/1/2020	1/1/2021
Table 3	1/1/2019	1/1/2020	1/1/2021
Table 4	6/30/2019	6/30/2020	6/30/2021

Unit Set-Aside Requirements

LIH Percentages

LIH Percentage *	#Units *	First Year *	Last Year *	Actions
30%	+ 14	2018	2020	
40%	+ 11	2018	2020	
60%	+ 10	2018	2020	

HOME Program

Configure by Bedroom

HOME Program *	Bedroom Type *	#Units *	First Year *	Last Year *	Actions
HOME Program - State		+ 1	2018	2020	
HOME Program - State		+ 2	2018	2020	
HOME Program - State		+ 3	2018	2020	

NHTF Program

Configure by Bedroom

NHTF Program *	#Units *	First Year *	Last Year *	Actions
Special Needs Populations entered on Table 3.1				
Special Needs Populations *	#Units *	First Year *	Last Year *	Actions
Physically Challenged	+ 7	2018	2020	
Special Needs Populations - Homeless entered on Table 3				
Special Needs Populations - Homeless *	#Units *	First Year *	Last Year *	Actions

SAVE | CANCEL

This page has the following section,

- Reporting Forms
- Unit Set-Aside Requirements
- LIH Percentages
- Tax Credits Special Needs

F8.1 Reporting Forms

Reporting Forms			
Site : May1	Site Key : 18314	Contract ID/OID :	First Reporting Year * 2019
Report Table	2019		2020
Table 1	<input checked="" type="checkbox"/> 1/31/2020		<input checked="" type="checkbox"/> 1/31/2021
Table 2	N/A		N/A
Table 3	N/A		N/A
Table 4	<input checked="" type="checkbox"/> 6/30/2020		<input checked="" type="checkbox"/> 6/30/2021

1. This section will be loaded after saving the Project Level Settings. Each site will have a separate tabular grid for editing the Report Tables.
2. If a project has 3 sites but the Funder is monitoring only 2 sites then the Reporting Forms should show the 2 sites only.
3. Every reporting forms tabular grid should show Site Name, Site key, Contract OID and first reporting year
4. User can Edit and select the required tables. Once the Funder received the report then the checkbox became non-editable as shown in the image below,

Reporting Forms				
Site : Bakerview Apartments	Site Key : 18015	Contract ID/OID :	First Reporting Year * 2015	
Report Table	2016	2017	2018	2019
Table 1	<input checked="" type="checkbox"/> 1/31/2017	<input checked="" type="checkbox"/> 1/31/2018	<input checked="" type="checkbox"/> 1/31/2019	<input checked="" type="checkbox"/> 1/31/2020
Table 2	N/A	N/A	N/A	N/A
Table 3	N/A	N/A	N/A	N/A
Table 4	<input checked="" type="checkbox"/> 6/30/2017	<input checked="" type="checkbox"/> 6/30/2018	<input checked="" type="checkbox"/> 6/30/2019	<input checked="" type="checkbox"/> 6/30/2020

Please refer the below points to know how it works

If it is an existing project:

- Display 4 years of reports, e.g. prior year, current year and next two reporting years. E.g. 2016 (prior), 2017(current), 2018 (next year) and 2019 (future year)
- Report years displayed would vary depending on submitted reports
 - a. E.g. if last year submitted report was 2017, funder settings should show: 2016 (prior), 2017 (current), 2018 (next year) and 2019 (future year)
 - b. If last submitted report was 2012, funder settings should show:

2011 (prior), 2012 (current), 2013 (next year), and 2014 (future year)

- Funder settings checkbox and Reporting Forms should show the exact same years (refer images 3a, 3b)

E.g. Project 1812 Eastlake – funder settings checkboxes should show 2014, 2015, 2016 and 2017

Default reporting forms should show 2014, 2015, 2016 and 2017

- Alternate and Farmworker reports - some tables should be required but not all. (see case 26404)
 - a. E.g. for Alternate reports only require Table 2, Table 3 and Table 4 – Table 1 is not required and therefore should not be checked.
- Reporting Forms boxes should auto-populate to the default required tables,
 - a. **Default reports** – should default to Table 1, Table 2, Table 3, Table 4
 - b. **Alternative reports** – should default to Table 2, Table 3, Table 4

Please note that Table 2 & 3 are not required for WSHFC funder hence it is showing N/A.

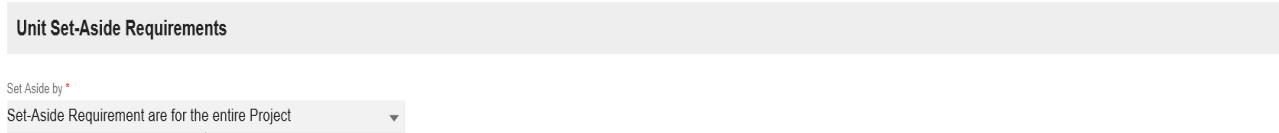
If it is a Newly created project:

WBARS should show Reporting Forms as follows:

- Display years according to First Reporting Year.
 - a. Project created in 2016 first reporting year is 2016: show 2016, 2017.
 - b. Project created in 2016, first reporting year was 2015: show 2015, 2016, 2017.
 - c. Project created in 2016, first reporting year was 2014: show 2014, 2015, 2016, 2017.
- Never show more than one year in future. If current year is 2018, show 2019, no later. If current year is 2019, show 2020, no later.
- **Reporting Forms checkboxes**
 - a. For default reports should be automatically checked for Table 1, Table 2, Table 3, Table 4 for all future reporting years by default.
 - b. For alternate/farmworker should be automatically checked for all Table 2, Table 3, Table 4 for all future reporting years by default.
- **Site claiming** – if the project is claimed, all sites should be claimed – all checkboxes should be automatically checked.

If a Funder is claiming a project newly then all the sites will be claimed automatically, and the Funder don't need to go to each site and claim.

F8.2 Unit Set Aside Requirements



Sections displaying under unit set aside requirement will vary based upon the Funder. If it is a **WSHFC** funder then LIH section and Tax Credit sections will be displayed. For other Funders LIH, HOME Program, Table 3 and Table 3.1 sections will be displayed.

When you click on “**Set Aside by**” it will show you two options. They are,

- Set Aside Requirement are for the Entire Project
- Set Aside Requirement are for each Site

F8.3 Set Aside Requirement are for the Entire Project

If you select” **Set Aside Requirement are for the Entire Project**” then you will be shown with the following message as shown in the image below,

Confirmation

This will merge all Set-Aside Requirements for each site and will move to entire project

YES NO

If you click on “**YES**” then it will merge all Set-Aside requirements for each site and will move to entire project.

F8.4 Set-Aside Requirement are set for each Site

If you select” **Set Aside Requirement are for the Entire Project**” then you will be shown with the following message as shown in the image below,

Confirmation

This will move project level Set-Aside Requirements to first site

YES NO

If you click on “YES” then it will move project level Set-Aside Requirements to first site.

F8.5 Select Claimed Site

Select Claimed Site *


2500 E Union

This field Will be enabled once the user chooses to set aside requirement as "Each Site"

F8.6 First Reporting Year

First Reporting year should be selected for each site

F8.7 LIH Percentages

LIH Percentages				
LIH Percentage *	#Units *	First Year *	Last Year *	Actions
				

[+ Add Rows](#)


LIH section should be configured by the Funder. Else the household details page doesn't show the RUP percentage.

If a project is monitoring by three Funder WSHFC, Commerce, KC and each of the them fixed LIH percentage as 80, 60, 50 then Move-In Restricted Unit Percentage will show 80,60,50.

Move-In Maximum Allowable Income and Current Maximum Allowable Income will be calculated based on RUP selection.

To add new LIH percentage click on [+ Add Rows](#)


F8.8 Tax Credits Special Needs

Tax Credits Special Needs				
Tax Credits Special Need *	#Units *	First Year *	Last Year *	Actions
				

[+ Add Rows](#)

To add new LIH percentage click on [+ Add Rows](#)

F8.9 Tax credit special needs

Tax Credits Special Needs				
Tax Credits Special Need *	#Units *	First Year *	Last Year *	Actions
				

[+ Add Rows](#)

To add new LIH percentage click on [+ Add Rows](#)



The “**Tax credit special needs**” is applicable only for the WSHFC Funder and has the following options to choose from,

- Disabled
- Elderly
- Farmworker
- Homeless
- Large Household
- Transitional

When activating Elderly Project checkbox will insert an Elderly record in Tax Credit section (applicable only for WSHFC funder) and it automatically takes the Total no. of Units in the projects, First Year means First Reporting Year and Last Year would be Year of Expiration.

When selecting Elderly in Tax Credit special need will make the Elderly Type visible.

F8.10 Home Program

HOME Program					
<input checked="" type="checkbox"/>	Configure by Bedroom				
<input type="checkbox"/>	Committed after 8/23/2013				
HOME Program *	Bedroom Type *	#Units *	First Year *	Last Year *	Actions
HOME Program - State	▼ Studio	▼ 4	2002	2016	
HOME Program - State	▼ 1	▼ 4	2002	2016	

[+ Add Rows](#)

HOME unit set-aside restrictions are listed under HOME Program heading, and only viewable under the Funder through which the HOME funds were awarded. For each project that has HOME-assisted units, the funder may break out the number of HOME units by bedroom size if specified in the funder contract for HOME funds.


There are totally three HOME programs. They are,

- HOME Program – State
- HOME Program – City
- HOME Program – County


Please note that the First Year and Last Year are report year and it doesn't mean From Date and To Date.

If a project has HOME program units with Last Year as 2017 then it means HOME program are applicable till submitting 2017 report year. For 2018 report the HOME icons and will get invisible. Please refer the project “**Raymond Eagle’s Building**”.

F8.10.1 Visibility of HOME Flag

Once the Funder sets the HOME program to any number of units in Funder Settings Page then the HOME icon  will be appeared next to project Name.


F8.11 NHTF Program

NHTF Program				
<input type="checkbox"/>	Configure by Bedroom			
NHTF Program *	#Units *	First Year *	Last Year *	Actions
				
Add Rows				

There are totally three NHTF programs. They are,

- NHTF Program – State
- NHTF Program – City
- NHTF Program – County

F8.12 Special Needs Population entered on Table 3.1

Special Needs Populations entered on Table 3.1				
Special Needs Populations *	#Units *	First Year *	Last Year *	Actions
				
Add Rows				

Funder can set any of the Special Needs population to number of units.

If the Table 3 report doesn't match the number of units entered by the Onsite Manager with the number of units fixed by the Funder. Then it shows a validation message "*Reported Domestic Violence Survivors set aside is less than required*"

Under Special Needs Populations, restrictions are noted for any special needs groups served by the project according to state, county or city funding mandates (these are not the Tax Credit Special Needs Housing Commitments) The number indicated and type of special need represents a unit set-aside requirement as defined in your contract .

F8.13 Special Needs Population – Homeless Entered on table 3

Special Needs Populations - Homeless entered on Table 3				
Special Needs Populations - Homeless *	#Units *	First Year *	Last Year *	Actions

[+ Add Rows](#)

Special Needs Population homeless has the following options to choose,

- Homeless Family head of Household Served
- Homeless Individual head of Household Served

Funder can set any of the Special Needs Populations – Homeless to number of units.

If the Table 3 report doesn't match the number of units entered by the Onsite Manager with the number of units fixed by the Funder. Then the validation is Yellow colour.

To add new LIH percentage click on [+ Add Rows](#)

F9 Show / Hide Columns

The right to choose the columns that need to be displayed in the Funders page is with the Admin / Funder. To customize the columns, you can click on this icon which is next to the add icon which opens the pop-up page to select the columns which needs to be displayed in the funders page.

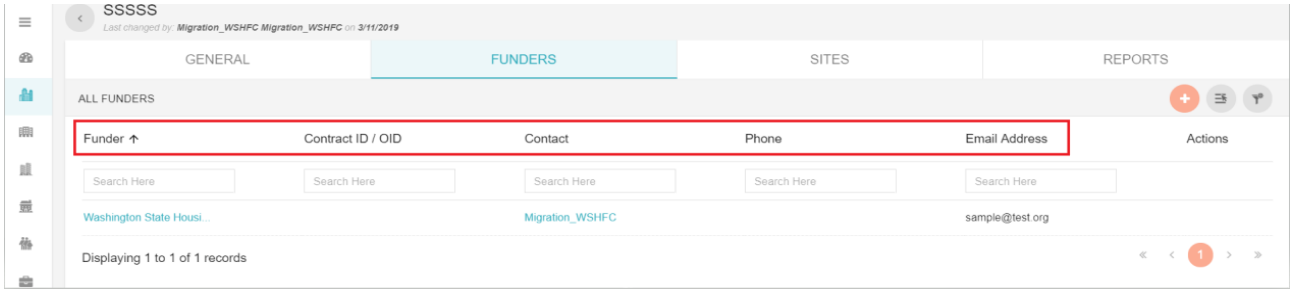
Image 1

Show/Hide Columns

- | | | | |
|--|---|---|--|
| <input checked="" type="checkbox"/> Funder | <input checked="" type="checkbox"/> Contract ID / OID | <input checked="" type="checkbox"/> Contact | <input type="checkbox"/> Project Expiration Date |
| <input type="checkbox"/> Project Type | <input checked="" type="checkbox"/> Phone | <input checked="" type="checkbox"/> Email Address | <input type="checkbox"/> Subsidy Commitment Text |


[SAVE](#) [CANCEL](#)

Image 2



You can click on the check box for the required columns where only the selected are displayed in the Funders page. Have a look at the images above where there are 5 columns selected is shown in Image 1 and only those which are selected is displayed in the Image 2. The columns can be customized by the Admin/Funder.

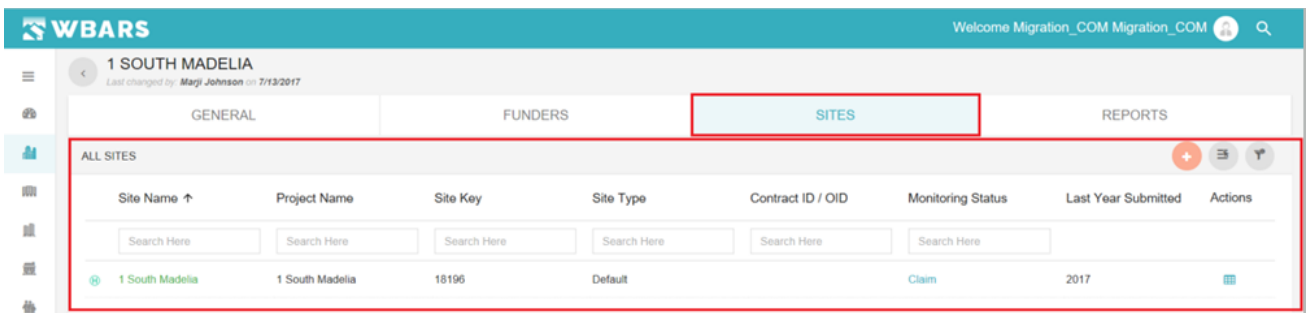
F10. Clear Filter

In order to clear the search fields, you can click on the  “Clear Filter” icon where the characters typed in the search field will be cleared.

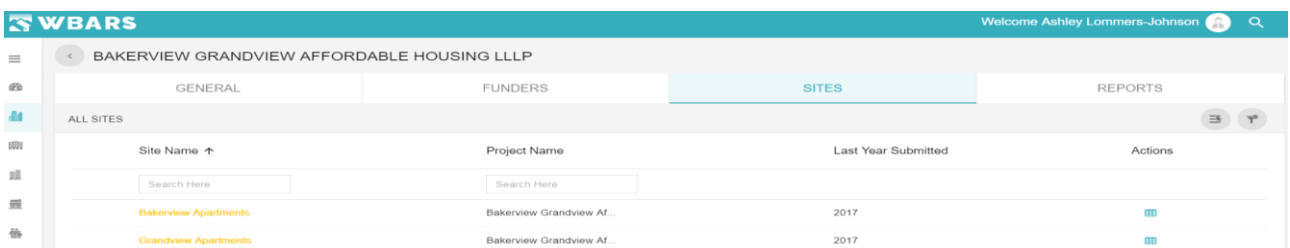
P. 10.3 Sites

The number of sites in the project and their details are shown in the sites page where the Monitoring Funder can add new sites under the created project. The screenshot of the funder interface is shown here

Funders



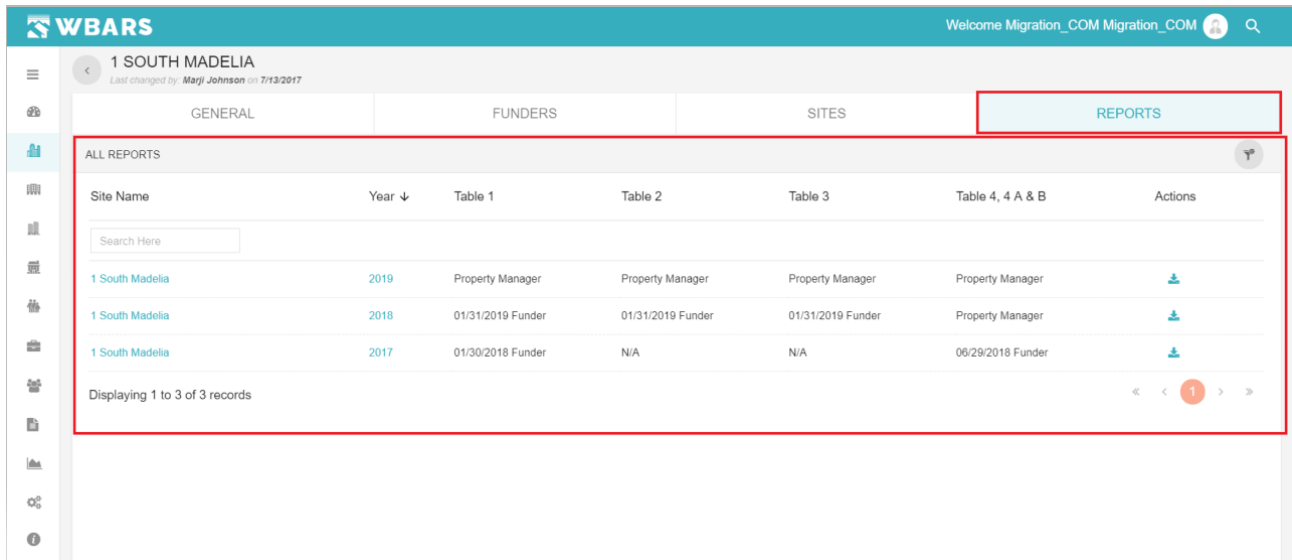
Contractors / Managers



From the above two screenshots you can see that the funder has the option to add new site and the contractors / owners will not have the option to add a new site.

P.10.4 Reports

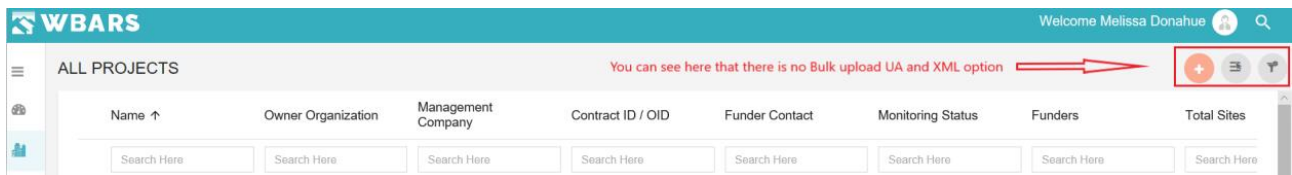
The reports page has the site and the related table reports where the table reports can be edited by clicking on the year which opens the reports cover page



P 11. Bulk Upload Utility Allowances

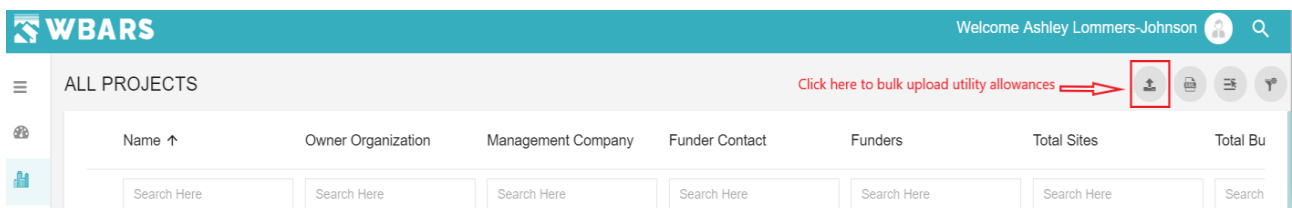
This is an option only for the **Contractors / Managers** where the **Funders** will not have this option. The Funder projects page is shown below for your reference,

Funder

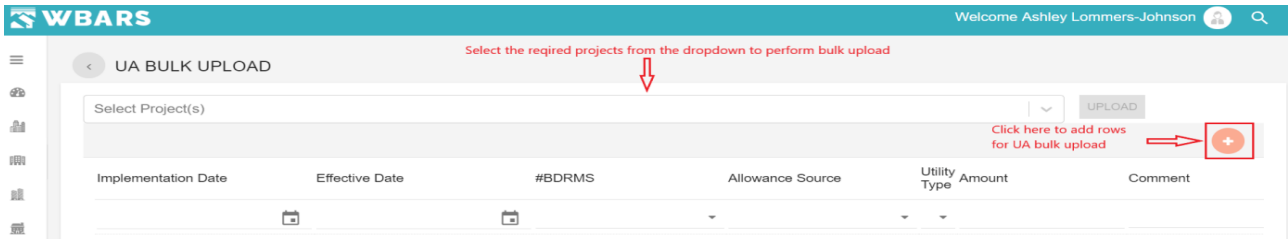


To Bulk upload the utility allowances you will click on this button which is placed at the top right corner of the projects listing page. The location of the button is shown in the screenshot below,

Contractors / Managers

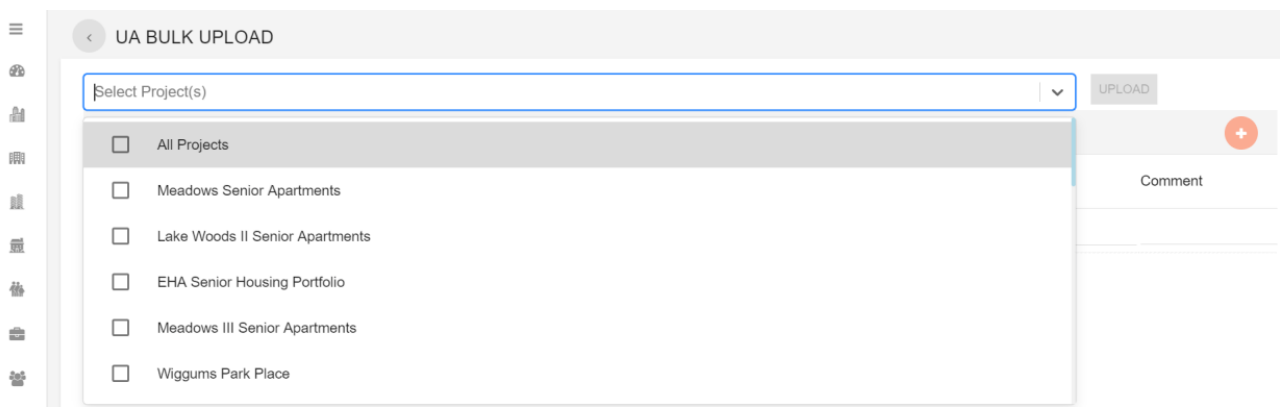


Once you click on the button you will be shown with the “**UA BULK UPLOAD**” page as shown in the image below,



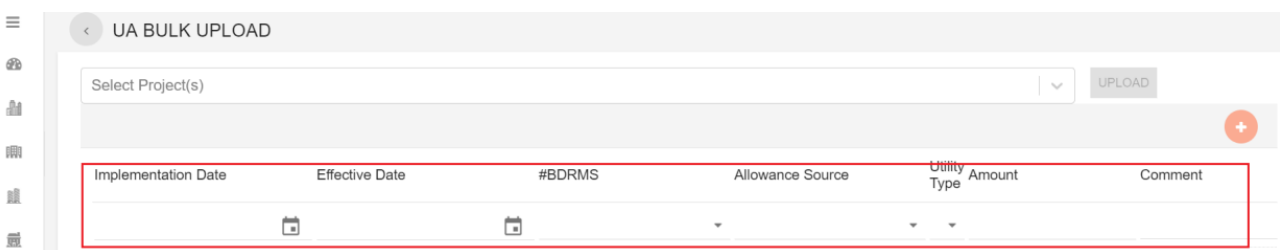
Here in UA bulk upload page you will perform the following,


Step 1 – Select the project

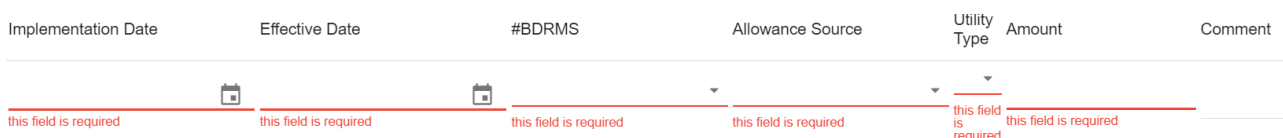


Click on “**Select Project(s)**” where you will be shown with the projects associated with your organization. You can multi select or click on “**All Projects**” to select all the projects.

Step 2 – Enter the fields highlighted in the image below,

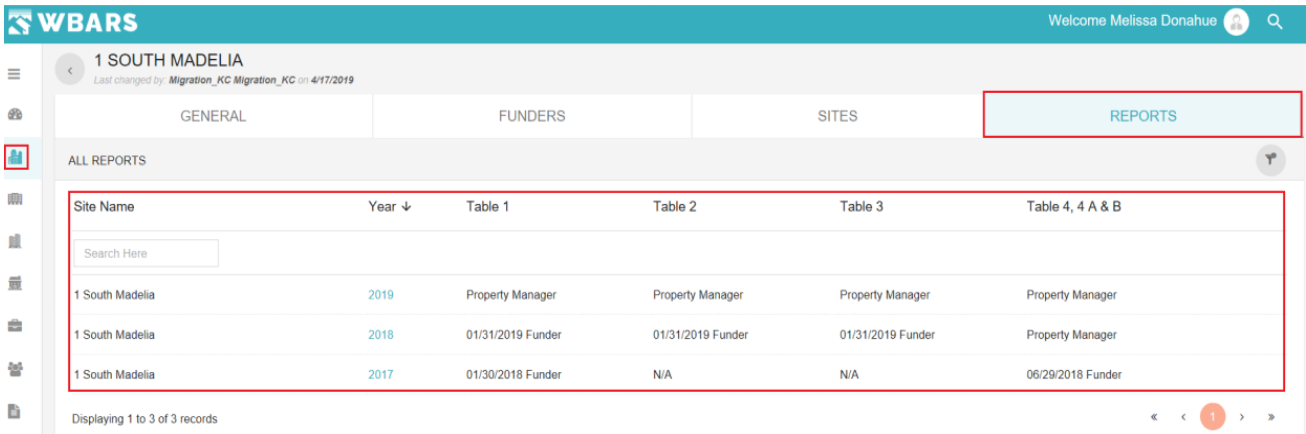


If you didn’t find the fields, you can click on the **ADD** button  which will add the fields to enter. You can’t bulk upload UA without entering these if you proceed to upload you will be shown with warning as in the image below.





Reports

Each project in the WBARS has reports where all the table data are stored and managed. In **project detail** page, the reports are the final section. The location of the reports section is highlighted and shown in the image below,



R1. How to view the Reports?

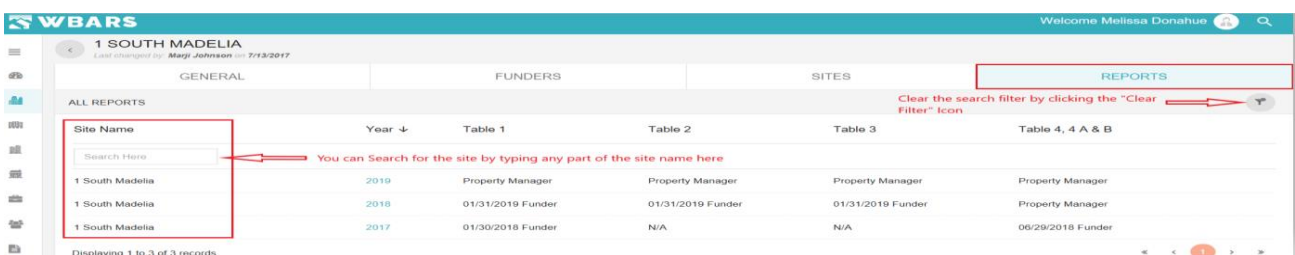
To view the reports, click on the Projects Icon  under Menu  where **“ALL PROJECTS”** page will be shown having the list of projects associated with your user login. Click on the project name for which you need to see its report details.


FYI – All the project names displayed in the list are links where you can click on the name to view the project details

Once you click on the project name you will be shown with its details in four different sections where the last is the reports section. Click on **“Reports”** and all the report details of the project will be shown with the following details, (Refer the above image for the screenshot of reports)

1. Site Name	2. Year	Table1
3. Table 2	4. Table 3	Table 4, 4A & B

R1.1 Site Name



The column “**Site Name**” has the list of all sites associated with the project which you have opened. The sites can be searched by typing in the search field below the column name and you can delete the typed inputs or just click on the “**Clear Filter**” button  . You can sort the list by clicking on the column title.

R1.2 Year

Site Name	Year ↓	Table 1	Table 2	Table 3	Table 4, 4 A & B
1 South Madelia	2019	Property Manager	Property Manager	Property Manager	Property Manager
1 South Madelia	2018	01/31/2019 Funder	01/31/2019 Funder	01/31/2019 Funder	Property Manager
1 South Madelia	2017	01/30/2018 Funder	N/A	N/A	06/29/2018 Funder

The column “**Year**” has the list of report years which is a link where you can click on the year and the **Reports Cover Page** will be shown. You can sort the list in ascending or descending order by clicking on the column title (**Year**).

R1.3 Table Details

Site Name	Year ↓	Table 1	Table 2	Table 3	Table 4, 4 A & B
1 South Madelia	2019	Property Manager	Property Manager	Property Manager	Property Manager
1 South Madelia	2018	01/31/2019 Funder	01/31/2019 Funder	01/31/2019 Funder	Property Manager
1 South Madelia	2017	01/30/2018 Funder	N/A	N/A	06/29/2018 Funder

The Table details shown here are the levels at which they are currently (i.e) the associated Funders, Owner, Property Manager and Onsite Manager’s Report submission level are shown and if its mentioned as N/A then that table details is not required for that project.

For Example – In the above image Under “**Table 1**” you can see the its is mentioned as property manager, Funder which refers to levels at which the reports are currently and only the users at that

levels associated with the project can access the table reports and move it to the next levels of hierarchy.

R2. Reports Cover Page

The reports cover page has the report history of all the tables and shows the overview information of the project. The screenshot of the “Reports Cover Page” is shown below,

Image 1 (Reports Cover Page)

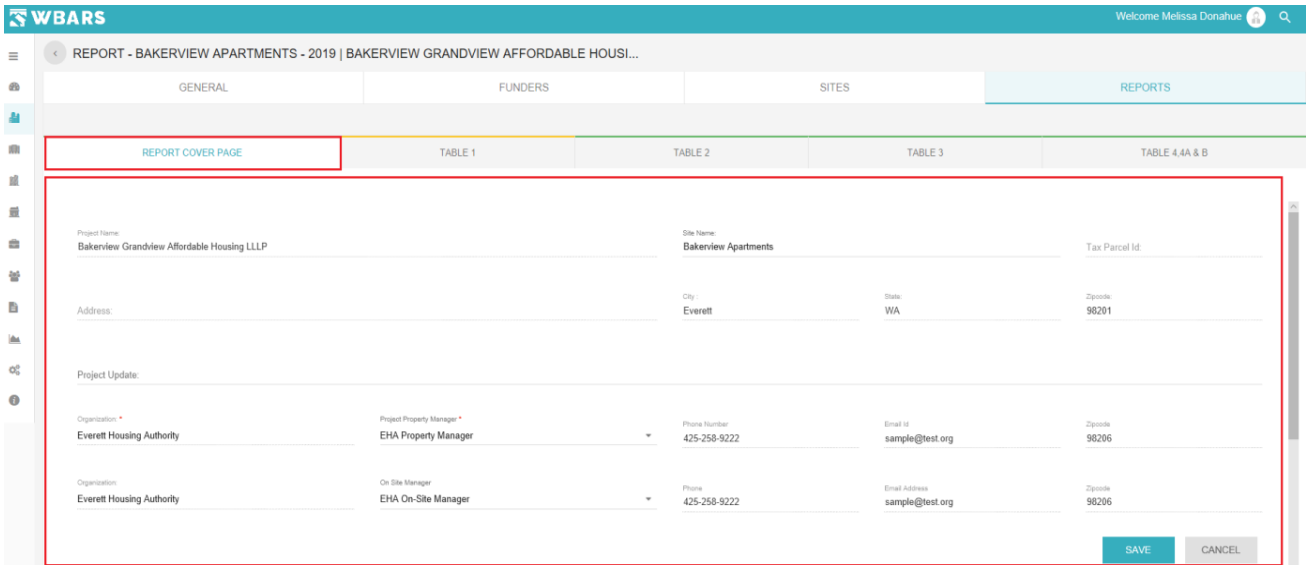


Image 2 (Reports Cover Page)

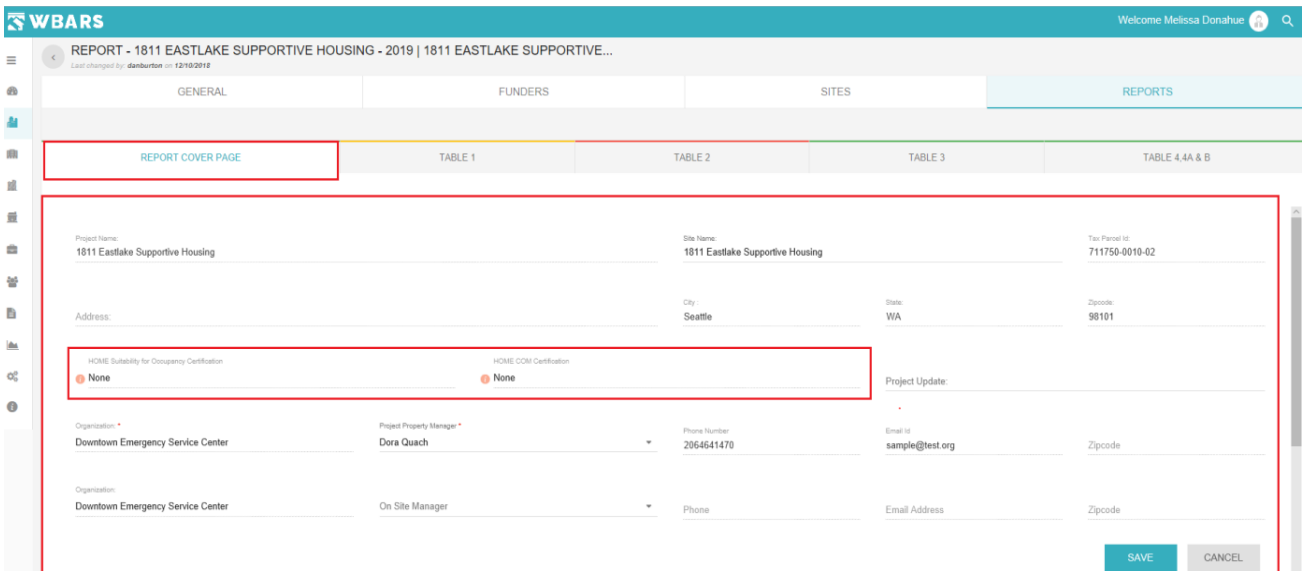
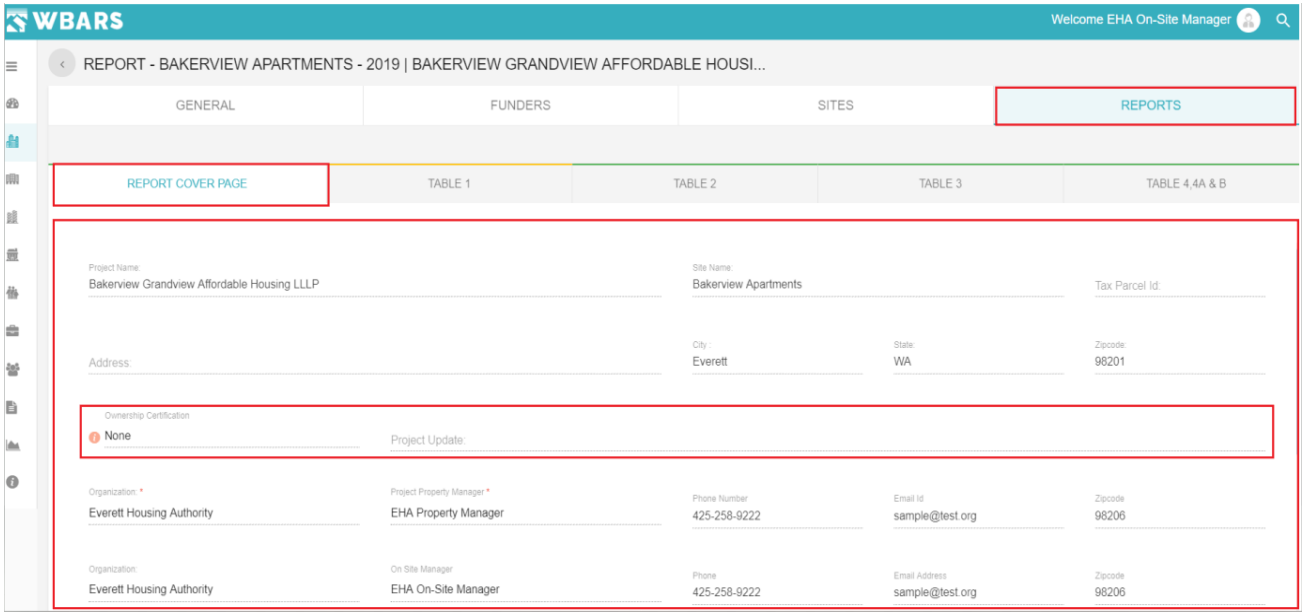


Image 3 (Reports Cover Page)



R2.1 Project Name

Project Name:
1811 Eastlake Supportive Housing

The project Name is displayed in this field.

R2.2 Site Name

Site Name:
1811 Eastlake Supportive Housing

The Site name is shown here where the Funder, Owner and the level contractor / Manager can change the site name.

R2.3 Tax Parcel ID

Tax Parcel Id:
711750-0010-02

The **Tax Parcel ID** is a read only field where you can view and will have no access to change the id.

R2.4 Address / City / State / Zip code

Address: 1300 W. Columbia Street City : Vancouver State: WA Zipcode: 98660

The **Address / City / State / Zip code** of the project will be shown here

Project Update

Project Update:

In the field “**Project update**” the user can enter any comments about the site if required.

The above screenshots are the screens of reports cover page where the **Image 1,2 and 3** the following fields vary,

- Ownership Certification
- HOME suitability for occupancy certification
- Home COM Certification

You can see that the above fields vary based on the user type.


R2.5 Ownership Certification

the owner will sign the “**Ownership Certification**”. This field will be enabled only to **Commerce, KC** and **SOH** projects. Owner should choose Accepted to sign the certification

Ownership Certification
 None

If you keep the cursor on the icon a message from the owner will be shown as shown in the image below,

I, Ashley Lommers-Johnson , hereby certify that the data contained in all WBARS Table reports for the applicable reporting year is accurate. I also certify that I am responsible for the accurate and timely submission of these reports to Funder level, even if I have authorized another staff person to submit these reports on my behalf.

 None

HOME suitability for occupancy certification / Home COM Certification

HOME Suitability for Occupancy Certification

None

HOME COM Certification

None

This is applicable only to the **HOME** projects.

When you place the cursor on the icon you will be shown with the message as shown in the image below,

24 CFR 92.504(d)(ii)(C): "The property owner must annually certify to the participating jurisdiction that each building and all HOME-assisted units in the project are suitable for occupancy, taking into account State and local health, safety, and other applicable codes, ordinances, and requirements, and the ongoing property standards established by the participating jurisdiction to meet the requirements of §92.251." To be completed by authorized owner/contractor prior to submission to funder level: I, Daniel Burton , certify that each building and all HOME-assisted units in the project are suitable for occupancy. hereby certify that the data contained in all WBARS Table reports for the applicable reporting year is accurate.

None

I, Daniel Burton , have been given express consent from my HOME funder to waive this certification requirement because the units funded with HOME program funding are not considered rental units as per HUD guidelines. The user can select any one check box

None

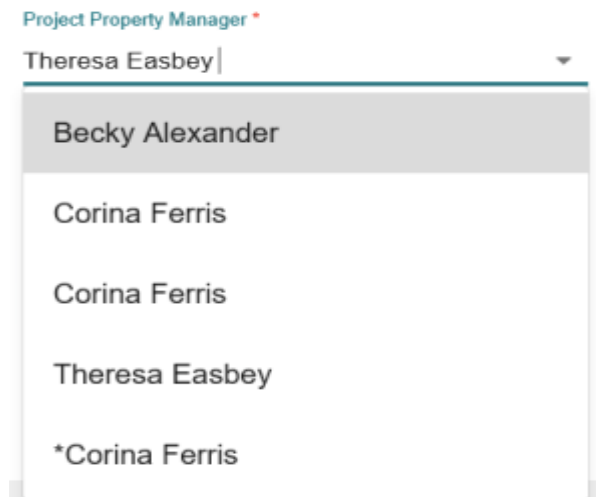
R2.6 Organization

Organization: *

Everett Housing Authority

The Property Manager's organization name will be shown here in this field

R2.7 Project Property Manager



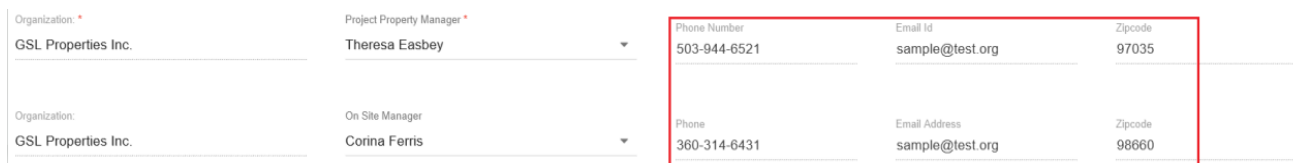
The project property manager name will be shown here, and this can be changed by the Funder or Owner. By clicking on this field, it shows the list of property managers in the dropdown where you can choose the property manager by clicking on the name.

If the project has an Onsite Manager then the Organization detail and the name of the onsite manager will be shown as on the image below,



Same as the property project manager the onsite manager name can be changed.

R2.8 Phone Number / Email ID / Zip Code



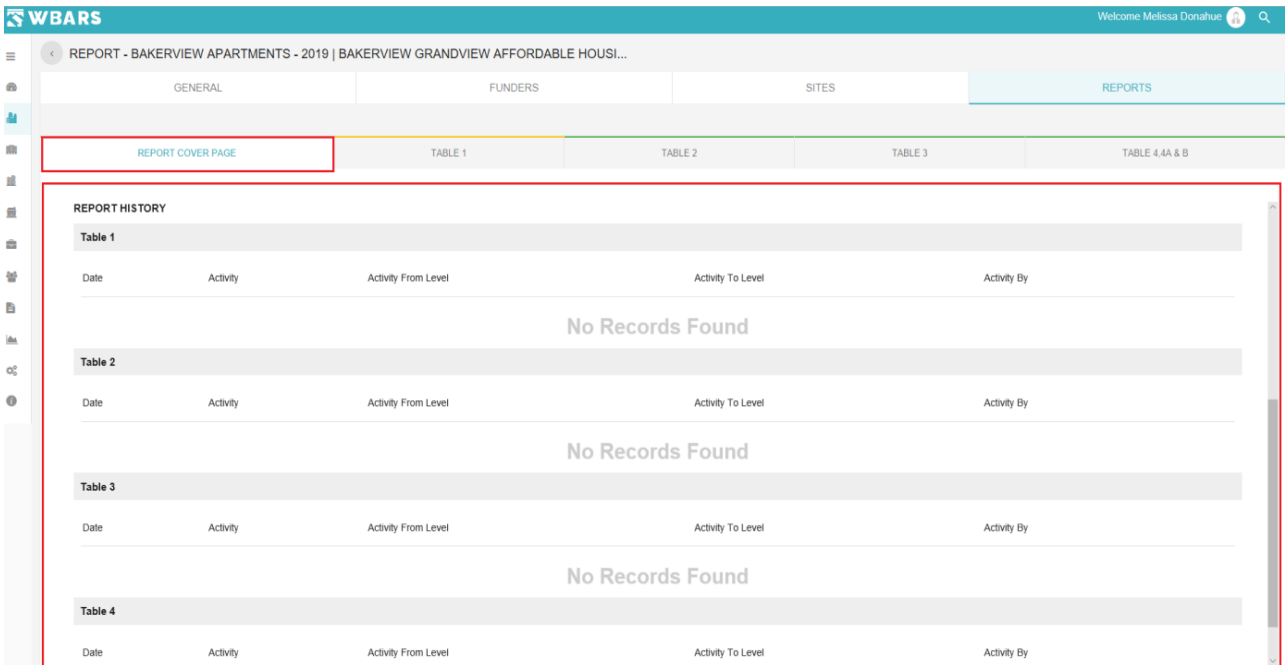
The **Phone Number / Email ID / Zip Code** of both Project Property Manager and Onsite Manage will be shown here.

R2.9 Save / Cancel



You can “**SAVE**” or “**CANCEL**” the changes. If you click on the “**SAVE**” button the changes made will be saved and if you wish not to proceed to save the changes you can click on “**CANCEL**” where the page will go back to the **Reports** page.

R2.10 Image 4 (*Reports Cover Page*) - Report History



The second section of the reports cover page is the “**Report History**” where all the table report submission status from level to level will be shown with the date and the type of activity with the user name will be shown here. Here the details are shown in a table format and all the fields are read only.

Table 1

The Table 1 has the details of the rental activity and the household information. Table 1 Report shows the currently occupied household units in all the building in a site where the details are shown in a tabular view where you can search in the search field below the column title by typing in the “**Search Here**” box and sort the column list ascending or descending by clicking the column title.

The screenshot of the Table 1 Section is shown below,

Report currently at Onsite Manager level.										
Building	Unit ↑	Household Name	Move-In Date	Current Recertification Date	Move-out Date	Vacant?	Restricted Percentage	Maximum Annual Household Income	Maximum Allowable Rent	Current Annual Income
<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>
WA-14-00158	120	<vacant>	03/17/2016	03/17/2019	03/31/2019	Yes	60%	34200	1099	28000
WA-14-00158	121	Andino-Barbier	05/07/2016	05/07/2019			60%	34200	916	21000
WA-14-00158	203	Penner	02/21/2018	02/21/2019			60%	39120	916	20267
WA-14-00158	204	Lavelle	03/29/2016	03/29/2019			60%	34200	916	28900
WA-14-00158	205	Petersen	04/24/2016	04/24/2019			60%	39120	1099	20406
WA-14-00158	206	Bojang	03/30/2016	03/30/2019			60%	34200	916	27745
WA-14-00158	207	Hibbard	10/15/2018	10/15/2018			60%	39120	1099	16530
WA-14-00158	208	Martin	04/22/2016	04/22/2019			60%	34200	1099	30000

T1. How to view the Table 1 report list?

To view the Table 1 report list you will click on the “**TABLE 1**” tab where the list of report details having the Household details will be shown as in the image above.

FYI

- **Table 1** report is applicable if the **Report Type** is **Default**
- **Table 1** report is not applicable If the **Report Type** is **Alternate / Farmworker**. You will be shown with the message as shown in the image below,

REPORT COVER PAGE	TABLE 1	TABLE 2	TABLE 3	TABLE 4, 4A & B
	This table is not currently required by any funder for this report year.			

T2. What does the colours convey?

You can see different colour lines above the table name and on the household name where they convey the validation status of the table. The coloured sections are highlighted and shown in the image below,

For more details check [validation](#).

REPORT - 33 OAKES - 2019 | EVERETT AFFORDABLE HOUSING PORTFOLIO

GENERAL FUNDERS SITES REPORTS

REPORT COVER PAGE TABLE 1 TABLE 2 TABLE 3 TABLE 4, 4A & B

Report currently at Onsite Manager level.

Building	Unit ↑	Household Name	Move-In Date	Current Recertification Date	Move-out Date	Vacant?	Restrict
WA-88-00161	1	Ruby Lewis-Altman	09/26/2016	09/01/2018			50%
WA-88-00161	10	Dana Wallace	02/19/2016	02/01/2018			50%
WA-88-00161	11	James Holmes	12/16/2014	05/01/2018			50%
WA-88-00161	12	Patrick Hebert	12/16/2014	06/01/2018			50%
WA-88-00161	2	Ashley Kreiman	07/16/2015	07/01/2018			50%

T3. How To See The Validation Errors?

If there are validation errors, you will be notified with the validation colours as mentioned above and in order to view what are those error you will have the button “**SHOW VALIDATION (ERRORS)**” as shown below,

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GENERAL FUNDERS SITES REPORTS

REPORT COVER PAGE TABLE 1 TABLE 2 TABLE 3 TABLE 4, 4A & B

Once you click on “**SHOW VALIDATION (ERRORS)**” all the validation errors related to the corresponding table will be shown as in the image below,

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GENERAL FUNDERS SITES REPORTS

REPORT COVER PAGE TABLE 3 TABLE 4, 4A & B

Move In Income is equal to or more than the maximum TC/HUD allowed income.

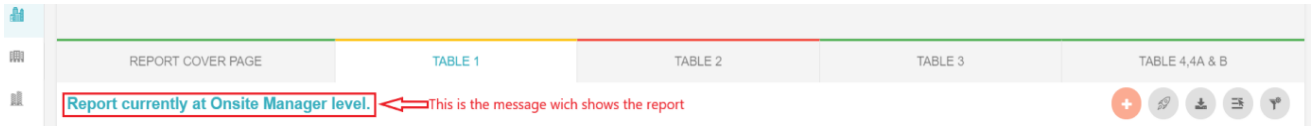
The units current certification date is more than 12 months old.

Annual Income exceeds HOME maximum allowable income.

HIDE VALIDATION ERROR(S)


T4. Who can edit update the table?

You will be shown with the current report level message and the level at which the report is the user who can edit update that table. The image of the message is shown below,



In the above image the report is at Onsite Manager Level and he has the access to edit / update the table.


T5. How to Move in Occupants?

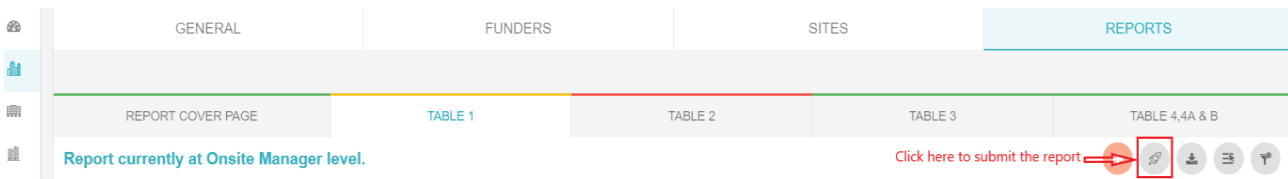
In order to add the occupants, you can click on the “**Move In**” button  which is placed at the top right corner. The location of the button is shown in the image below,



Once you click on Move in the page will be shown. [Click here](#) to view the “**Move In page**”

T6. How to Submit / Unsubmit The Report?

To Submit the report, you will click on the “**Submit**” button  which is at the top right corner. The location of the button is shown in the image below,




Once you click on the submit button you will shown with a “Warning” message as shown in the image below,

Warning:

Submitting a Report Table will send it forward to the level after yours. Once submitted you will no longer be able to edit this specific Report Table page for this year; you will be able to edit any other Report Table still under your control. Do you want to continue?



Click on “**SUBMIT**” if you wish to continue submitting the report next level or click “**CANCEL**”.

To Unsubmit the report you will click on the “**Unsubmit**” button  and provide the reason to unsubmit in the comments section.

T6.1 Report Submission

Onsite Manager

- 1) Initially the Onsite Manager will feed all the required data in the household unit and Submit the report to PM for verification by clicking **Submit Report** button.
- 2) Following popup message will appear with OK, Cancel buttons. “WARNING: Submitting a Report Table will send it forward to the level after yours. Once submitted you will no longer be able to edit this specific Report Table page for this year; you will be able to edit any other Report Table still under your control. Do you want to continue? “

Clicking OK button will submit the report to PM. A confirmation message will be appeared “***The report has been submitted.***”

- 3) After submitting the report, the appropriate status should be shown in below pages
 - 1) Reports Tab
 - 2) Report Cover Page

Property Manager

- 1) Once the report submitted to PM, they will see both a Submit and Unsubmit Report button.
- 2) Upon clicking Submit Report a warning popup message will appear “WARNING: Submitting a Report Table will send it forward to the level after yours. Once submitted, you will no longer be able to edit this specific Report Table page for this year; you will be able to edit any other Report Table still under your control. Do you want to continue? “
- 3) After submitting the report, the appropriate status should be shown in below pages
 - 1) Report tab
 - 2) Reports Cover Page

Owner

- 1) Once the report submitted to Owner will get both Submit and Unsubmit Report button.
- 2) If the property has HOME program or required Owner Certification signature, then it should show the validation message, such as “**HOME Suitability for Occupancy Certification must be**

signed by the Owner on the Report Cover Page before any Report Table is Submitted to the Funder level.”

- 3) If the property required Owner Certification signature, then it should show the validation message, such as: “Ownership Certification must be signed by the Owner on the Report Cover Page before any Report Table is Submitted to the Funder level.”
- 4) Upon clicking Submit Report a warning popup message will appear , such as “Cannot submit to the funder level until first day of next calendar year”. Example: 2018 Table 1 report can be submitted to Funder only on or after 01/01/2019.
- 5) After submitting the report, the appropriate status should be shown in below pages
 - a) Report Tab
 - b) Report Cover Page

If Funder unsubmitted the previous report year, then current report year will be disappeared.

Example:

Onsite Manager submitted 2018 report to property manager level now Funder unsubmitted 2017 report to owner for correction then automatically 2018 report will be invisible in Reports by year section.

T6.2 Table 1 Report HOME Validation

If the property doesn’t accommodate the number of HOME units fixed by the Funder, then it should show a validation message.

“Sno County: A total of 10 units must be identified as "HOME Program-county" to need Sno county HOME program requirements. 9 units are correctly identified as "HOME program - county" for this reporting year.”

T7. Email Notification


Email should be sent to the appropriate contacts upon submitting the report to next level. Please refer the below email sent to the property manager

The Table 1 report for Meadows Senior Apartments was submitted to the Property Manager on 4/2/2018 8:07:39 AM, EHA Property Manager, by EHA On-Site Manager. You were sent this message because you are listed in the WBAR system as the on-site manager, property manager or owner contact responsible for submitting the annual report for this project.


This table is now available for editing by EHA Property Manager who is listed as the Property Manager for this report. When all edits have been made EHA Property Manager will need to submit the report forward to Ashley Lommers-Johnson. Ashley Lommers-Johnson the owner contact and is responsible for the final submission to the funder. For instructions and more information about the WBAR system please visit <http://www.wshfc.org/managers/wbars.htm>

Thank you.

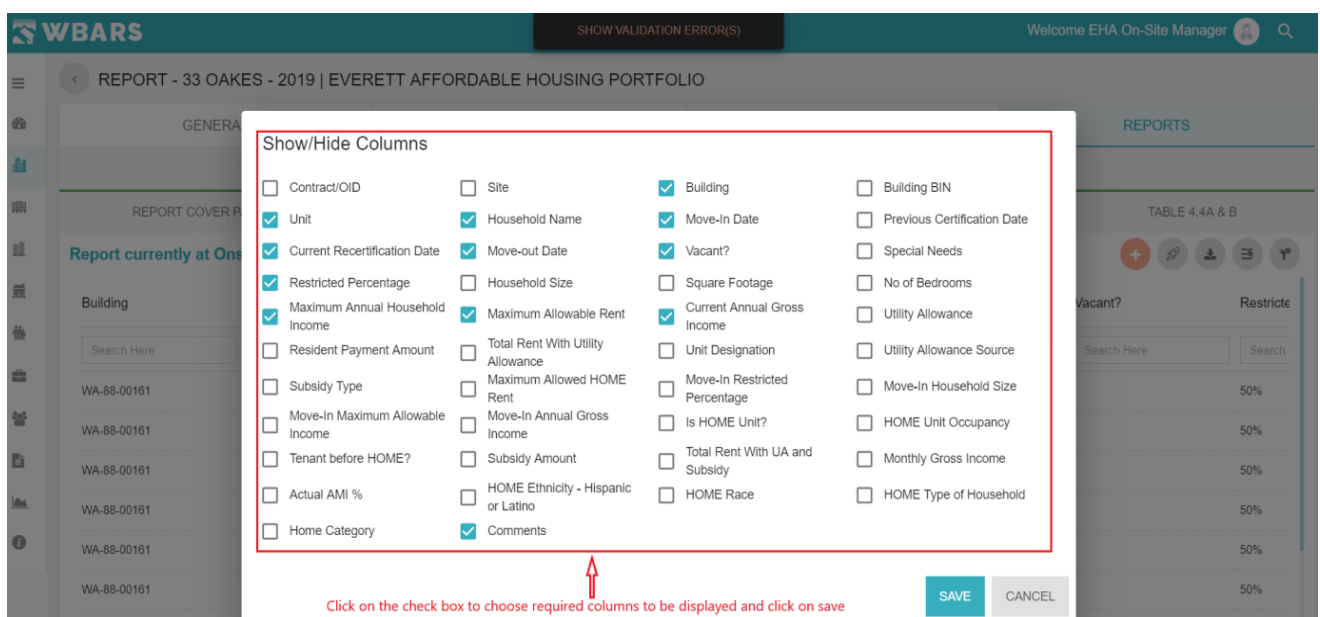
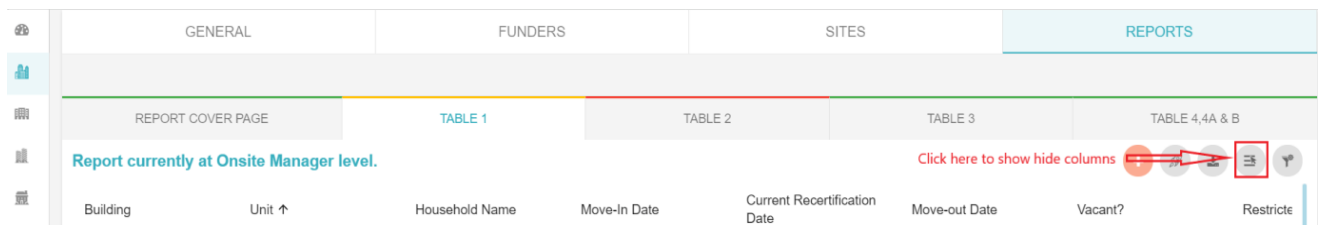
T8. Download the Report

The reports can be downloaded by clicking on the “Download” button  where you will be shown with the notification “Please wait” and your report will get downloaded.

T9. Show / Hide Columns

You can customize the columns which are shown under “TABLE 1”. Click on “Select the Column”  button where a pop up with the option to choose the required columns to display will be shown.

The below image shows the columns highlighted which can be customized.



As a funder, you can choose all or any required fields by Clicking on the Check box. You can

Select / Unselect any field and click on “SAVE” to save all the changes done or “CANCEL” to unsave the changes.

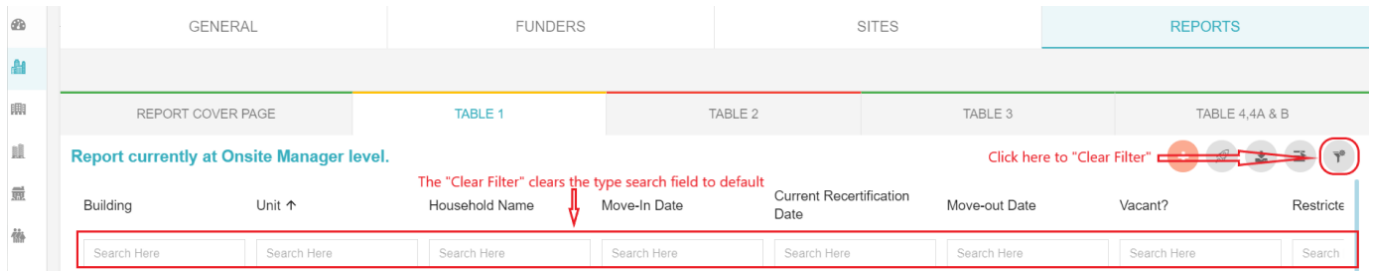
T10. Clear Filter

“Clear Filter” performs a common task for all users where clicking on the clear filter icon



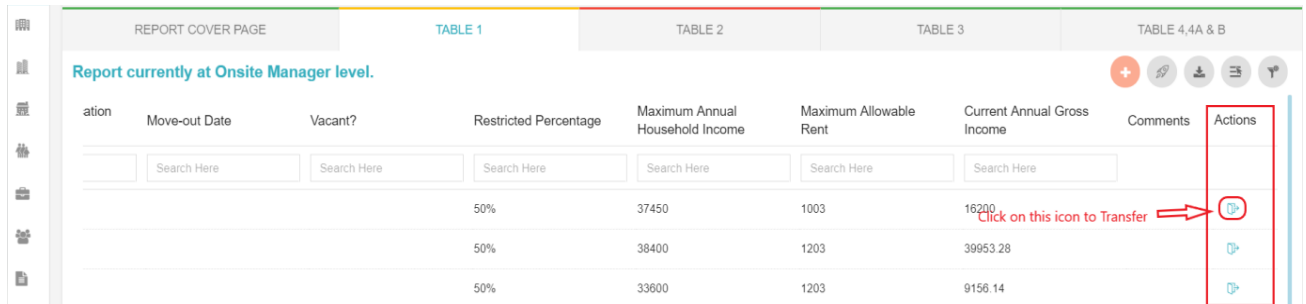
clears the “Search Field” ie. the set filter criteria will be cleared and restored to default.

The location of “Clear filter” is shown in the image below,

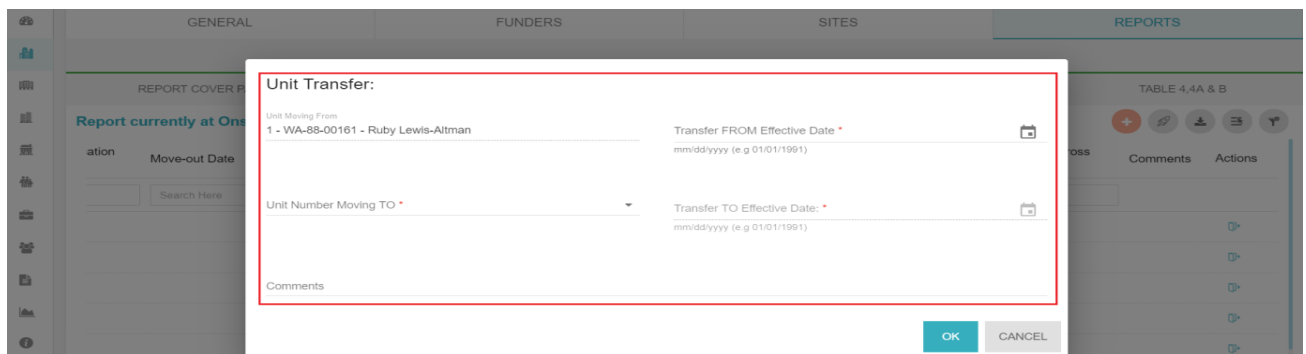


T11. Transfer

The user level at which the table is has the access to transfer the house hold unit. To transfer the household unit, you will click on the “Transfer” button under “Actions”. The location of the button is shown in the screenshot below,



Once you click on the “Transfer” button you will be shown with the popup requesting details on the “Unit Transfer” as shown in the image below,



The Unit Transfer has the following fields which needs to be provided. They are,

- Unit Moving From
- Unit Number Moving To
- Transfer FROM Effective Date
- Transfer TO Effective Date
- Comments

FYI – The fields with “*” symbol is mandatory

T11.1 Unit Moving From

Unit Moving From
1 - WA-88-00161 - Ruby Lewis-Altman

The unit name from where you are moving the household unit will be displayed here and this is a read only field.

T11.2 Unit Number Moving To


Unit Number Moving TO *

The unit number to which you are transferring can be chosen here where once you click on the field you will be shown with the options to choose the unit number. The empty/vacant units will be shown here and if there are no vacant units then you will be shown with “**No Options**” to choose.

T11.3 Transfer FROM / TO Effective Date

Transfer FROM Effective Date * 
mm/dd/yyyy (e.g 01/01/1991)

Transfer TO Effective Date: * 
mm/dd/yyyy (e.g 01/01/1991)

The effective dates to transfer will be chosen here. By clicking on the field you can type the date or click on the calendar icon  to choose the required dates.

Note –

- “Transfer FROM Effective Date” should be Less than “Transfer TO Effective Date”
- “Transfer TO Effective Date” should be Greater than “Transfer FROM Effective Date”

Transfer FROM Effective Date *

Date must be less than To Effective date

Transfer TO Effective Date: *

Date must be greater than FROM Effective date

Click on “OK” once you have provided with all the field details. If you click on “OK” without entering the field details you will be shown with the warning message as in the image below,

Unit Transfer:

Unit Moving From

1 - WA-88-00161 - Ruby Lewis-Altman

Transfer FROM Effective Date *

Please enter valid Transfer FROM Effective Date



Unit Number Moving TO *

Please select Unit Number Moving TO

Transfer TO Effective Date: *

Please enter valid Transfer TO Effective Date



Comments

OK

CANCEL

FYI

- A household in Unit # 001 was vacated on 03/01/2018 then the user attempts to transfer a Unit # 007 to Unit # 001 on or before 03/01/2018 then **Unit Number Moving TO** field should not list the Unit # 001.

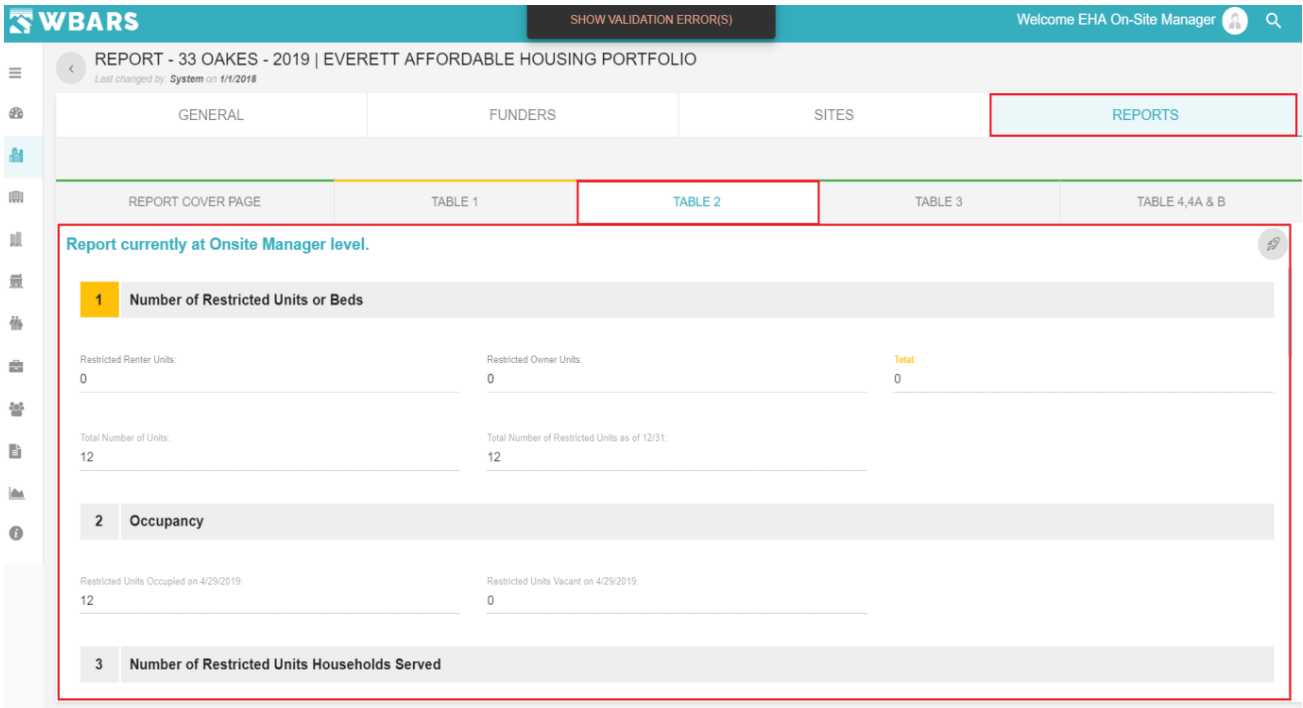
- Once the unit transferred from one unit to another unit it should show a message in top of household detail that “This household transferred to Unit 20 in Building WA-13-00121 on 03/22/2018”.
- Unit Number Moving FROM should list the unit numbers based on Move-In Date. A household unit # 003 was Moved In on 10/01/2018 and the user tries to transfer this unit with date 01/01/2018 then it should not list the Unit # 003.
- When transferring a household unit, the date between From and To is more than one day then it is mandatory to enter comments, so it will show a validation message “Please enter comments because the difference between Transfer FROM Effective Date and Transfer TO Effective Date is more than one day.”

Table 2

Table 2 has the occupant characteristics.

T1. How to view Table 2?

To view the Table 2 report, you will click on the “**TABLE 2**” tab under “**REPORTS**” where the page will be shown as in the image below,



The fields and requirements shown in **TABLE 2** varies based on the custom report type.

The Custom Report Types are,

- Default
- Alternate
- Farmworker

Custom Report Type – Default

If the Site has custom report type set as **Default**, then the Table 2 collects information of Restricted Units only. Common Area Units and Market Units will not be included.

The Fields in the TABLE 2 are,

1. Number of Restricted units or beds
2. Occupancy
3. Number of restricted units Households served
4. Race and Ethnicity of Restricted Unit Household Served

5. Restricted unit Households Income
6. Total Restricted Units Households Served
7. Total Restricted Units Households Served During the Year
8. Comments

T1.1 Number of Restricted units or beds

1 Number of Restricted Units or Beds		
Restricted Renter Units: 0	Restricted Owner Units: 0	Total: 0
Total Number of Units: 12	Total Number of Restricted Units as of 12/31: 12	

T1.1.1 Restricted Renter Units

Restricted Renter Units:

0

If your program provides housing for low income renters (including transitional housing projects and single-family group homes), enter the number of units/beds on the renter’s line. If you do not provide this type of housing enter 0. This figure is the sum of each unit that is rentable by a tenant and was income restricted at some point during the reporting year. This includes units that are vacant as of 12/31 but were previously restricted during the year. When totalled with Restricted Owner Units, it should match the Total Number of Restricted Units as of 12/31.

T1.1.2 Restricted Owner Units

Restricted Owner Units:

0

If your program provides housing for low-income homeowners, enter the number of units on the Owners Line. If you do not provide this sort of housing opportunity, enter 0. (For example, owners would be reported in manufactured housing communities). This figure is the sum of each unit that is owned by a tenant and was income restricted at some point during the reporting year. This includes units that are vacant as of 12/31 but were previously restricted during the year. When totalled with Restricted Renter Units, it should match the Total Number of Restricted Units as of 12/31.

T1.1.3 Total

Total:

0

The total count of the Restricted Renter unit and Owner units will be shown here in this field.

T1.1.4 Total Number of Units

Total Number of Units:

12

A read only text will show the count of total no. of units available in the site. This is generated by WBARS based off all the units that are listed at the site, regardless of whether the households occupying them are income restricted or market rate units.

Total Number of Restricted Units as of 12/31

Total Number of Restricted Units as of 12/31:

12

A read only text will show the count of total no. of restricted units available in the site. This figure is generated by the system based on the total number of units with the Table 1 Unit Designation “Restricted” (including vacant units that were previously income restricted) at years end.

Validation should be shown if the total doesn’t match with total restricted units and the icon colour should be changed to Yellow and the validation issue should be described in Validation Issues section.

T1.2 Occupancy

2	Occupancy
Restricted Units Occupied on 4/29/2019:	Restricted Units Vacant on 4/29/2019:
12	0

T1.2.1 Restricted Units Occupied on 4/29/2019

Restricted Units Occupied on 4/29/2019:

12

System generated number that provides a snapshot of all units listed in Table 1 with the Unit Designation “Restricted” that are occupied as of 12/31 of the reporting year.

T1.2.2 Restricted Units Vacant on 4/29/2019

Restricted Units Vacant on 4/29/2019:

0

System generated number that provides a snapshot of all units listed in Table 1 with the Unit Designation “Restricted” that are vacant as of 12/31 of the reporting year. The system will include all currently vacant units that were occupied at an earlier point in the year with the Unit Designation “Restricted”.

T1.3 Number of restricted units Households served

3 Number of Restricted Units Households Served		
Total Number of Family Household Served:	Total Number of Individual Household Served:	Total:
4	8	12

T1.3.1 Total Number of Family Households served

Total Number of Family Household Served:

4

A system generated number that counts each household (tenant record) entered on Table 1 that has a unit designation of “Restricted” and two or more tenants. Tenants may not actually be a family but are counted as such for the purposes of this field to reflect the unit not being occupied by an individual.

T1.3.2 Total Number of Individual Households served

Total Number of Individual Household Served:

8

Individual Households means the number of individuals living alone or unrelated individuals living together in a group facility. This is a system generated number that counts each household (tenant record) entered on Table 1 that has a unit designation of “Restricted” and only one tenant.

T1.3.3 Total

Total:
12

This field is generated by WBARS based on all households that were designated as restricted for the reporting year in Table 1. The total count of both Family and Individual Households served will be shown here in this field.

T1.4 Race and Ethnicity of Restricted Unit Household Served

4 Race and Ethnicity of Restricted Unit Household Served				
Race	Head of Household count by Race		Head of Household count of Hispanic Ethnicity	Comments
American Indian or Alaska Native	0	0	0	
American Indian or Alaska Native, and Black (AA)	0	0	0	
American Indian or Alaska Native, and White	0	0	0	
Asian	0	0	0	
Asian and White	0	0	0	
Black or African American (AA)	0	0	0	
Black or African American (AA), and White	0	0	0	
Native Hawaiian or Other Pacific Islander	0	0	0	
Not Disclosed	0	0	0	
Other Multi-Racial	0	0	0	
White	0	0	0	
Total	0	0	0	
Total Restricted Unit Households Served	0	0	0	

These fields are required to be entered by the on-site manager or property manager, with each head of household being counted only once. You must complete the race and ethnicity (if Hispanic) for each head of household in order to get a green validation icon light in the system. If the head of household identifies only as Hispanic and does not identify with a corresponding race, enter the household in the “Not Disclosed” race category and in the Hispanic ethnicity category. If the race of a head of household is not known, it is perfectly acceptable to count the Head of Household under “Not Disclosed”.

This section has been completed correctly when all heads of households designated on Table 1 as “Restricted” for the report year (calendar year) have been accounted for in a race category, and the total number of heads of households under race equals the number of system calculated households on Table 2, section 3).

Information should be filled by the onsite manager / property manager with total counts with Race type and Hispanic Ethnicity

Validation

Validation should be if the total doesn't match with total restricted units and the icon colour should be changed to Yellow.

Section 4 - Head of Household by Race and Ethnicity total doesn't match the total number of households served during the year.

T1.5 Restricted Units Household Income

5 Restricted Unit Households Income		
0-30 %	31-50 %	51-80 %
8	3	1
Over 80%	Total Restricted Unit Household Served	
0	12	

These fields are generated by WBARS based on information provided by the property manager in Table 1. All households for the reporting year listed in Table 1 as having a Unit Designation of “Restricted” are categorized according to the tenant’s actual current income in relation to the Area Median Income of the project site’s county.

0-30% : 0

31-50% : 0

51-80% : 0

Over 80% : 0

Total Restricted Unit Households Served : 0

T1.6 Total Restricted Units Households Served

6 Total Restricted Unit Households Served		
Single Mothers With Children:	Single Fathers With Children:	Total:
0	0	0
Total Household Served:		
12		

T1.6.1 Single Mothers with Children

Single Mothers With Children:

0

Enter the total number of income restricted households where a single mother with children resides.

T1.6.1 Single Fathers with Children

Single Fathers With Children:

0

Enter the total number of income restricted households where a single father with children resides.

Total

Total:

0

The total of single Father / Mother with children is shown here in this field

T1.6.3 Total Households Served

Total Household Served:

12

This field is generated by WBARS based on all households that were designated as restricted for the reporting year in Table 1

You will receive a green validation icon if your total number of single parents does not exceed the total number of restricted unit households served during the year. The system cannot validate the number you enter against any other information.

T1.7 Total Restricted Units Households Served During the Year

7

Total Restricted Unit Households Served During the Year

Total Rent Households in RestrictedUnits:

0

Total Owner Households in RestrictedUnits:

0

Total:

0

Total Household Served:

12

T1.7.1 Total Renter Households in Restricted Units

Total Rent Households in Restricted Units:
0

Figure entered by the property manager. This figure is the sum total of each household that is rentable by a tenant and was designated as income restricted. This includes units that are vacant as of 12/31 but were previously restricted during the year. When totalled with Restricted Owner Units, it should match the Total Households Served field that is generated by WBARS from Table 1 information.

T1.7.2 Total Owner Households in Restricted Units

Total Owner Households in Restricted Units:
0

Typically, rental projects will only have renter households. Exceptions include manufactured housing communities where residents may own their homes but also may have some rental units. Enter the sum total of each household that is owned by a tenant and was designated as income restricted. This includes units that are vacant as of 12/31 but were previously restricted during the year. When totalled with Restricted Renter Units, it should match the Total Households Served field that is generated by WBARS from Table 1 information.

T1.7.3 Total Households Served

Total Household Served:
12

This field is generated by WBARS based on all households that were designated as restricted for the reporting year in Table 1.

T1.7.4 Total

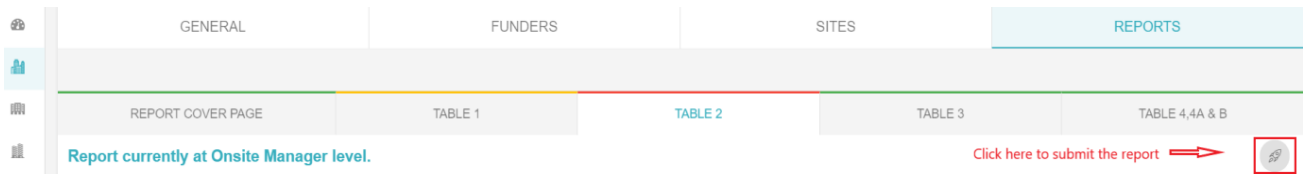
Total:
0

The total of Renter / Owner households in restricted units is shown here in this field

Note: You must hit “**Save**” before navigating away from this page or submitting the report for your entries to be saved. Upon saving, please explain in the Comments section any yellow validation messages.

T2. How to Submit the Table 2 Records?

To Submit the Table 2 records, you can click on the “**Submit**” button placed at the top right corner. The location of the button is shown in the image below,



Once you click on the submit button you will be shown with a “Warning” message as shown in the image below,

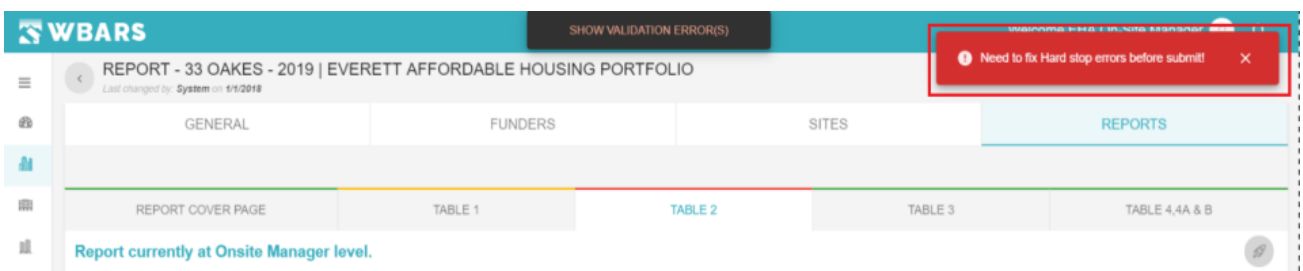
Warning:


Submitting a Report Table will send it forward to the level after yours. Once submitted you will no longer be able to edit this specific Report Table page for this year; you will be able to edit any other Report Table still under your control. Do you want to continue?



Click on “**SUBMIT**” if you wish to continue submitting the report next level or click “**CANCEL**”.

If you proceed to submit the report if the validation is in red then you will shown with the validation warning message as shown in the image below,



To Unsubmit the report you will click on the “**Unsubmit**”  button and provide the reason to unsubmit in the comments section.

T2.1 Report Submission

- 1) If the report type is Default, then Table 2 report could not be submitted to Funder unless submitting Table 1 report to Funder. However, Table 2 report can be submitted to Owner level even though Table 1 not submitted to Funder.

If the user attempts to submit Table 2 report before submitting Table 1 then it should show a validation message

“Table 1 must be Submitted for the current year before Table 2 can be submitted.”

- 2) If the user didn't enter any information and just submitting the Report from property to owner level. Then it shows a validation message **“Table 2 must be saved at least once before Submission.”**
- 3) Table 2 and Table 3 is not applicable for WSHFC funding projects

T2.2 Email Notification for report Submission

Once the report submitted to the next upper level it will be notified to the receiver by email as follows

The Table 2 report for Meadows Senior Apartments was submitted to the Property Manager on 4/2/2018 8:02:24 AM, EHA Property Manager, by EHA On-Site Manager. You were sent this message because you are listed in the WBAR system as the on-site manager, property manager or owner contact responsible for submitting the annual report for this project.

This table is now available for editing by EHA Property Manager who is listed as the Property Manager for this report. When all edits have been made EHA Property Manager will need to submit the report forward to Ashley Lommers-Johnson. Ashley Lommers-Johnson the owner contact and is responsible for the final submission to the funder.

For instructions and more information about the WBAR system please visit <http://www.wshfc.org/managers/wbars.htm>

Thank you.

Please note that the contact name and level should be changed appropriately.

T2.3 Email Notification for report un-submission

Once the report unsubmitted to the next lower lever then it will be notified to the receiver by email as follows

The Table 2 report for Meadows Senior Apartments was Unsubmitted to the On-Site Manager on 4/2/2018 8:56:06 AM, by EHA Property Manager. You were sent this message because you are listed in the WBAR system as the on-site manager, property manager or owner contact responsible for submitting the annual report for this project. The report has been returned to the Onsite Manager level in the WBAR system. EHA On-Site Manager is listed as the On-Site manager contact and must log into the WBAR system to make corrections and resubmit to the Property Manager. For instructions and more information about the WBAR system please visit <http://www.wshfc.org/managers/wbars.htm>

Thank you.

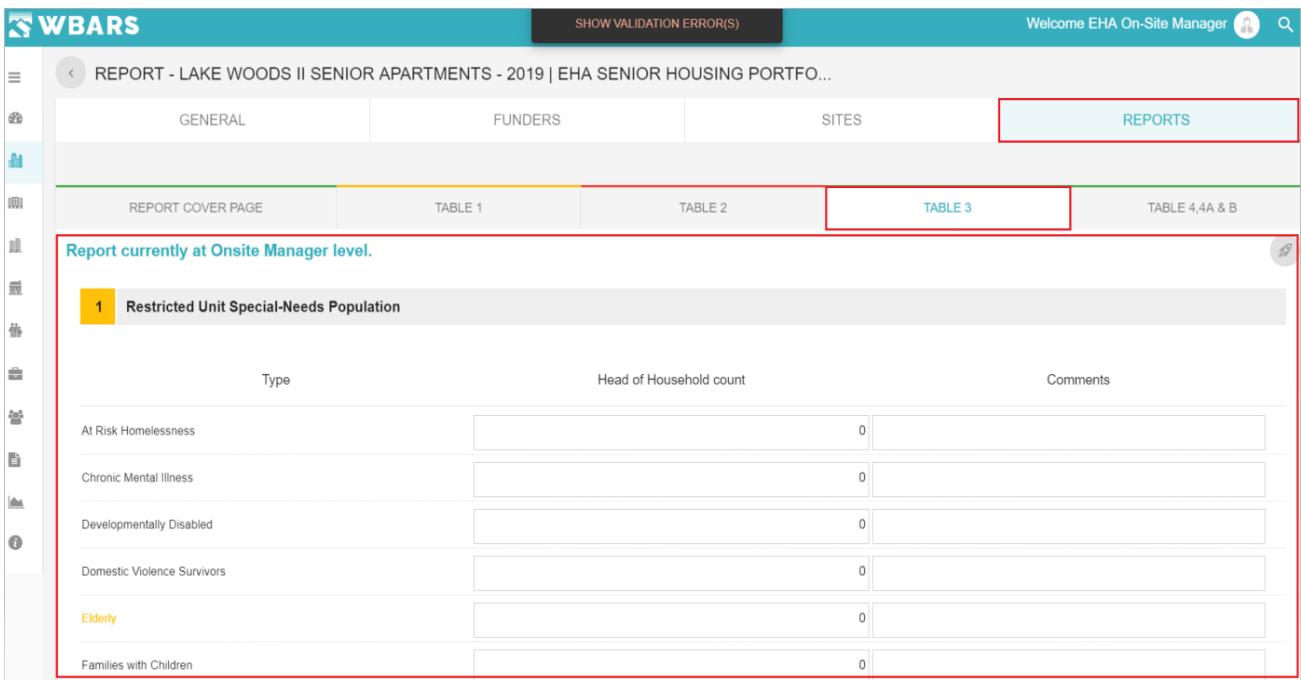
Table 3

Table 3 allow users to track aggregate special needs population about restricted households.

Note - Table 3 report is not applicable for WSHFC Funder.

T1. How to view Table 3?

To view the Table 3 report, you will click on the “**TABLE 3**” tab under “**REPORTS**” where the page will be shown as in the image below,



You can see the level at which the report is currently where only they have the access to edit/update the report and submit it to next levels.

The table has the following sections,

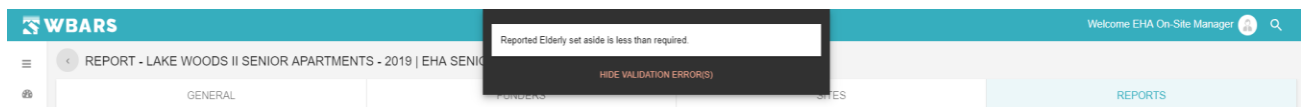
- Restricted Unit Special Needs Population
- Total Number of Homeless Households in Restricted Units

T1.1 Restricted Unit Special Needs Population

1 Restricted Unit Special-Needs Population		
Type	Head of Household count	Comments
At Risk Homelessness	<input type="text" value="0"/>	<input type="text"/>
Chronic Mental Illness	<input type="text" value="0"/>	<input type="text"/>
Developmentally Disabled	<input type="text" value="0"/>	<input type="text"/>
Domestic Violence Survivors	<input type="text" value="0"/>	<input type="text"/>
Elderly	<input type="text" value="0"/>	<input type="text"/>
Families with Children	<input type="text" value="0"/>	<input type="text"/>
Farmworker	<input type="text" value="0"/>	<input type="text"/>
Farmworker - Seasonal	<input type="text" value="0"/>	<input type="text"/>
Frail Elderly	<input type="text" value="0"/>	<input type="text"/>
General	<input type="text" value="0"/>	<input type="text"/>
Mentally Ill / Chemically Addicted	<input type="text" value="0"/>	<input type="text"/>
Multiple Special Needs	<input type="text" value="0"/>	<input type="text"/>
<hr/>		
People Living with HIV/AIDS	<input type="text" value="0"/>	<input type="text"/>
Physically Challenged	<input type="text" value="0"/>	<input type="text"/>
Substance Abusers / In Recovery	<input type="text" value="0"/>	<input type="text"/>
Traumatic Brain Injury	<input type="text" value="0"/>	<input type="text"/>
Veterans	<input type="text" value="0"/>	<input type="text"/>
Young Adult 18-24	<input type="text" value="0"/>	<input type="text"/>
Youth <18	<input type="text" value="0"/>	<input type="text"/>
Total	<input type="text" value="0"/>	

Here, you can enter the units count of head of household who has different special needs. You can also enter comments. Funders who are monitoring the projects will assign the Total units required for Special Needs Population in the Table 3 and Table 3.1 sections at Funder Settings Page.

If the Unit count doesn't match with the entered value in Table 3 Restricted Unit Special Needs Population then it shows the appropriate validation message like shown in the screenshot below,



For each restricted unit occupied by a household at the Site during the reporting year, please count that household one time in the most appropriate category. Not all households will have a special need. If a household cannot easily be classified using one of the listed characteristics, please use the multiple special needs category and identify needs on the comment line to the right.

Please do not count households in more than one category. Total Households reported must be less than or equal to the number of households reported under #3 of Table 2. Funders want information on all households, but at a minimum, if your contract specifies that a special needs population will be served at the Site, you must report that you are satisfying the requirements of your contract.

Validation icons will display next to each category where that population is required to be served by one of your funders.

T1.2 Total Number of Homeless Households in Restricted Units

2 Total Number of Homeless Households in Restricted Units		
Homeless Family Head of Household served	Homeless Individual Head of Household served	Total
0	0	0

T1.2.1 Homeless Families Households Served = Number of family households served that were homeless.

Homeless Family Head of Household served:

0

T1.2.2 Homeless Individual Households Served = Number of homeless Individual households served.

Homeless Individual Head of Household served:

0

T1.2.3 Total Households counted should be equal to or less than the total number of households served as reported in Section 3 of Table 2.

Total:

0

T2 Validations

If the total no. of homeless household is greater than the total household served in Table 2 then it should show a validation message as “**Total Number of Homeless Households is greater than Total Households Served on Table 2**” Validation icon colour should also change to Yellow.

If the Total household’s unit count of Special Needs Population is greater than the total households served on Table 2 then it should show the below validation message as shown below and Validation icon colour should also change to Yellow colour

- **Total number of special needs population is greater than total households served on Table 2**

- Total Number of Homeless Households is greater than the Total households served on Table 2

If the user attempts to submit the Table 3 report without making any changes then it shows a popup message “Table 3 must be saved at least once before submission”

If the user attempts to submit Table 3 report to Funder without submitting Table 1 then it should show the message “Table 1 must be submitted for the current year before Table 3 can be submitted”

When the user attempts to submit Table 3 report to Funder before of calendar year then it should show a message “Cannot submit to the funder level until first day of next calendar year.”

When the user attempts to save Table 3 with minus value then it should show a validation message “Please enter positive number in Count Row No 1”

Enter **comments** below the table if necessary or if you have a yellow validation icon next to any single category.

Comments

Note: You must hit “**Save**” before navigating away from this page or submitting the report for your entries to be saved.

Table 4, 4(a) and 4(b)

Table 4, 4(a) and 4(b) allow users to input and edit information about property annual income, expenses and reserves for each site at a project for the calendar year.

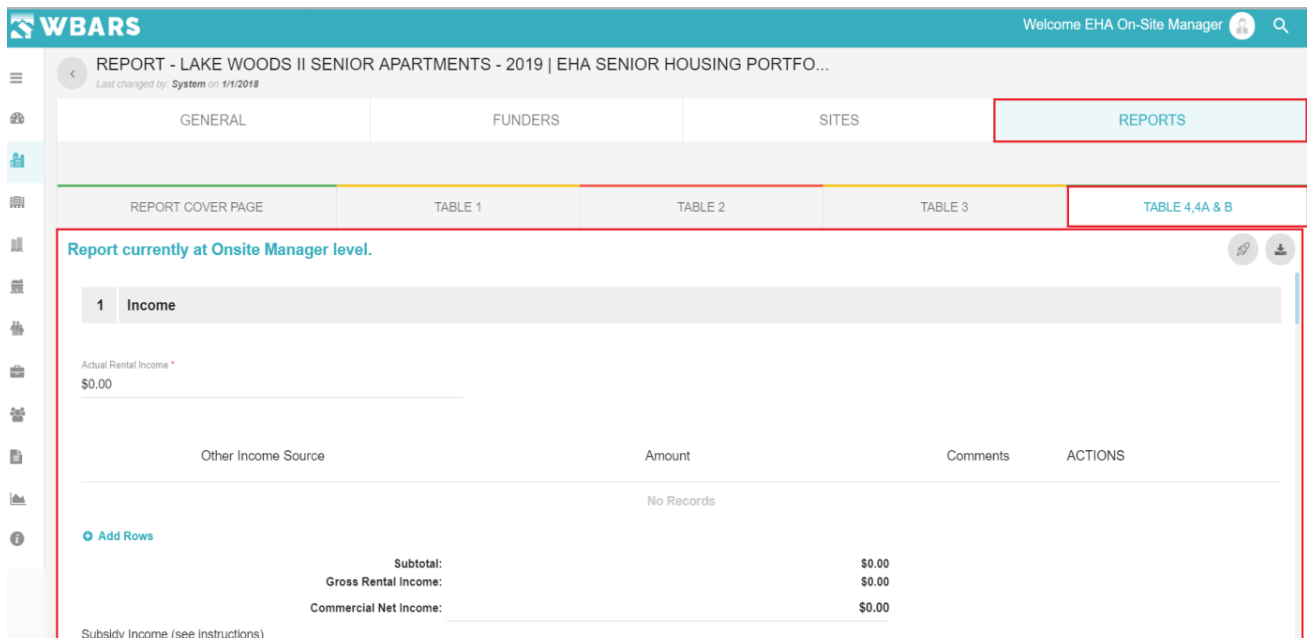
T1. Table 4 General Notes

Table 4 is intended to be a simple income and expense report for the CALENDAR year January 1 through December 31, using accrual accounting EXCEPT for the line items replacement and operating reserves which are cash accounting because reserve accounts must match bank statements as of 12/31 every year. Please make all required reserve deposits PRIOR to 12/31.

Table 4 reports only operational activity (not construction/rehab/development) as a means of assessing project performance. If a funder wants more detail, they can get that from project financials and/or audit depending on what your contract requires you to submit. Table 4 needs to be supported by yearend internal accounting. Income and expense data should be reported as it relates to each site unless otherwise directed by all Funders in the project.

T2. How to view Table 4, 4(a) and 4(b)?

To view the Table 4, 4(a) and 4(b), you will click on the “Table 4, 4A & B” tab under “REPORTS” where the page will be shown as in the image below,



The screenshot displays the WBARS interface for a report titled "REPORT - LAKE WOODS II SENIOR APARTMENTS - 2019 | EHA SENIOR HOUSING PORTFO...". The navigation menu includes "GENERAL", "FUNDERS", "SITES", and "REPORTS". Under "REPORTS", the sub-tab "TABLE 4, 4A & B" is selected. The main content area shows a message: "Report currently at Onsite Manager level." Below this, there is a section for "Income" with a value of "\$0.00". A table lists "Other Income Source", "Amount", "Comments", and "ACTIONS", with a note "No Records". At the bottom, a summary shows "Subtotal: \$0.00", "Gross Rental Income: \$0.00", and "Commercial Net Income: \$0.00".

You can see the level at which the report is currently where only they have the access to edit/update the report and submit it to next levels.

The table has the following sections,

- Income
- Expense
- Debt Services Payment
- Performance Measures
- Table 4 Comments
- Table 4(a) Replacement Reserve
 - Replacement Comments
 - Operating Comments
- Table 4(b) operating reserve

T2.1 Income

1 Income					
Actual Rental Income *					
\$0.00					
Other Income Source		Amount	Comments	ACTIONS	
No Records					
Add Rows					
		Subtotal:	\$0.00		
		Gross Rental Income:	\$0.00		
		Commercial Net Income:	\$0.00		
Subsidy Income (see instructions)					
Subsidy Type		Operating	Services	Comments	ACTIONS
No Records					
Add Rows					
		Subtotal:	\$0.00	\$0.00	
		EGI: Effective Gross Income: (operating + service dollars)	\$0.00		

T2.1.1 Actual Rental Income

Actual Rental Income *

\$0.00

Enter the total amount of actual gross potential rent, less actual vacancy loss, to equal actual rent charged to all tenants for the year by Site.

See example below:

Include total unit rent amount for on-site staff in actual gross potential rent. If any on-site staff receives a “rent free” unit, note the cost of the free rent in Expenses under “On-Site Management”.

Do not factor in rent concessions or bad debt in the Actual Rental Income field. Note the cost of rent concessions and bad debt in Expenses under “Other”.

T2.1.2 Actual Gross Potential Rent (assume a 22unit project with varied rents)

7 units x \$1051 (rent) x 12 months \$88,284

10 units x \$701 (rent) x 12 months \$84,120

5 units x \$584 (rent) x 12 months \$35,040

TOTAL \$207,444

LESS VACANCY LOSS: 4 units x \$1051 (rent) x 2 months each \$8,408

1 unit x \$701 (rent) x 3 months \$2,103

TOTAL \$10,511 EQUALS ACTUAL RENT CHARGED for OCCUPIED UNITS: \$207,444 (\$10,511)
\$196,933

EXAMPLE of Actual Rental Income Calculation

T2.1.3 Other Residential Income

Enter all other non-subsidy income generated by the site and deposited into the operating account. Specify the income source from the drop-down choices provided and note the exact amounts separately for each source.

For example: laundry, parking, interest (on operating account only—do not put reserve account interest here), damage fees, fundraising/donations. See drop down choices for full list. Do not use “other income” or “other fees” from this list unless there is no other suitable choice. If you use “other income” or “other fees” you must give specific detail in the Comments field. For example: an amount of \$5,400 is identified as “other income” and in the Comments you would put “\$5,000 cell phone antennae; \$400 soda machine”.

T2.1.4 Commercial Net Income field

You must calculate this amount by adding all income generated from non-residential sources (retail, office, etc.), including rent, commercial reimbursables, etc. and then subtracting all commercial expenses (taxes, insurance, utilities, etc.) associated with the commercial lease(s).

T2.1.5 Subsidy Income rows

Enter all subsidy income for the site from the choices listed in the Operating Subsidy table listed below. Specify the subsidy income source from the drop-down choices listed under Subsidy Type. Note the exact amounts separately for each source. If your subsidy income is not listed in the drop down, choose “Other”, then identify and explain in “Comments” specifically what the income source is. User should use the choices in the dropdown and use “Other” only when needed.

T2.1.6 Effective Gross Income field

This field will automatically calculate based on the other information you entered. Be sure to verify calculated totals with your records. Total income should reflect site/building financial records.

T2.2 Expense

2 Expense					
	2019 Operating	2019 Services	2018 Operating	2018 Services	Comments
Audit / Accounting	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contracted Maintenance	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Decorating/Turnover/Painting	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Electric	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Elevator	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fire Safety	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Insurance	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Landscaping	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Services	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance and Janitorial	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marketing	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Off Site Management	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Oil/Gas/Other	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
On Site Management	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Operating Reserve	\$0.00	\$0.00			
Other	\$0.00	\$0.00			
Other	\$0.00	\$0.00			
Pest Control	\$0.00	\$0.00			
Real Estate Taxes	\$0.00	\$0.00			
Replacement Reserve	\$0.00	\$0.00			
Security	\$0.00	\$0.00			
Telephone	\$0.00	\$0.00			
Water & Sewer / Garbage	\$0.00	\$0.00			
Total:	\$0.00	\$0.00	\$0.00	\$0.00	
Total Expenses (Operating + Services):	\$0.00				
NOI: Net Operating Income (Effective Gross Income-Total Expenses):	\$0.00				

Enter the annual operating expenses incurred by the Site in the “Operating” column fields. Do NOT include initial construction/rehab/development expenses. Most line items are self-explanatory, but some are explained in more detail below. If there were no expenses incurred for a specific line item, such as “Elevator”, leave it blank.

Do your best to fit your expense categories into Table 4’s line items. The “Other” line should be used ONLY if there is no other place to put the expense. Rent concessions, bad debt, WSHFC monitoring fees, condo dues, ground lease, are examples of what could go in “Other”. If you note an amount in “Other” that includes several items, you must give the specific breakdown by amount detail in the last column “Comments” field. If your project receives social service subsidy income, please itemize the services expenses in the “Services” column fields. Projects without social service subsidy should list all expenses in the “Operating” column.

T2.2.1 On Site Management: Should include salaries, benefits, training, office supplies—anything related to staff and staff management activity on-site.

T2.2.2 Off Site Management: Should include management fees (including partnership fees), training for property managers, book keeping that agency staff perform, business taxes, travel—anything related to staff and staff management activity off-site.

T2.2.3 Replacement Reserve: This line item is on a CASH accounting basis because reserve accounts must match with bank statements as of 12/31 every year. Required deposits must be made PRIOR to 12/31 every year. Show only the total gross payment you made in that year out of your operating account and deposited into your replacement reserve account. Do NOT show net amounts of reserve account activity. Amounts paid out of operating funds and reported on Table 4 will

automatically show as a deposit to replacement reserves account activity on Table 4(a). If your full required deposit to replacement reserves was not made in any given year, you must explain why in the “Comments” column.

T2.2.4 Operating Reserve: This line item is on a CASH accounting basis because reserve accounts must match with bank statements as of 12/31 every year. Required deposits must be made PRIOR to 12/31 every year. Show only the total gross payment you made in that year out of your operating account and deposited into your operating reserve account. Do NOT show net amounts of reserve account activity. Amounts paid out of operating funds and reported on Table 4 will automatically show as a deposit to operating reserves account activity on Table 4(b). If your full required deposit to operating reserves was not made in any given year, you must explain why in the “Comments” column.

Please note that expenses paid directly out of replacement or operating reserve accounts should be reported separately on Tables 4(a) or 4(b) as appropriate. Reserve account interest should show only on Tables 4(a) and 4(b), do NOT show reserve account interest on Table 4.

T2.2.5 Total Expenses field: This field will auto-calculate based on your entered information. Verify calculated totals with your records. Total expenses should reflect Site/building financial records.

T2.2.6 Net Operating Income field: This auto-calculating field subtracts the total expenses from the total effective gross income.

T2.3 Debt Services Payment

3 Debt Services Payment							
Lender	Other Funder / Comment	Monthly Loan Payment	Rate %	Amortization (Years)	Term (Years)	Funds Paid	ACTIONS
No Records							
						Total Deb Service:	\$0.00
						Cash Flow (NOI-Debt Service):	\$0.00

List all the amortized debt being carried by the project. List first all debt for which payments are being made. Be sure to complete both the “Monthly Loan Payment” and the “Funds Paid” columns.

For each Lender, please identify the Lender in the text field, the monthly loan payment, the interest rate, the period of amortization in years for the loan and the term in years of commitment for service with the property.

For amortized debt that is deferred, enter ONLY the name of lender, rate%, amortization, and term. Do not put any payment amount in the “Funds Paid” column unless payments are due and were paid during the reporting year.

T2.3.1 Cash Flow

This auto-calculated field subtracts the Total Debt Service from the Net Operating Income (NOI) and shows Cash Flow for the Site/building. Cash flow is the amount of cash available after all payments have been made for operating expenses and mortgage principal and interest. If cash flow is negative, please explain why in the “Comments” section and tell us your plan to address the problem(s).

T2.4 Performance Measures

4 Performance Measures		
Calculated Vacancy Rate 0.66%	Calculated Occupancy Rate 99.34%	Average Unit Turn Around 0
Replacement Reserve Per Unit \$0	Operating Reserve Per Unit \$0	Debt Coverage Ratio 0.00

Based on the information you submit to WBARS, the system counts all units in a building regardless of restriction and will calculate the Site/building ‘s Vacancy Rate, Occupancy Rate, Average Unit Turn Around (in days), and Reserves per Unit. Use these performance measures to guide management of your project! Typical industry standard goals are an occupancy rate above 95%, a collection rate above 97%, and average unit turn around <14 days.

T2.4.1 Occupancy Rate

Calculated Occupancy Rate
99.34%

This figure is calculated from Table 1 records

“The total # of days occupied from Table 1 records Divided by (Number of calendar days for the report year Multiplied by the total number of ALL units in the site including both restricted and non-restricted units”

T2.4.2 Average Unit Turn Around

Average Unit Turn Around
0

This figure is also calculated from Table 1 records. It is the average number of days between each instance of occupancy in each unit during the report year. (Including both restricted and non-restricted units)

T2.4.3 Reserve per Unit

Replacement Reserve Per Unit

\$0

The ending balance of each reserve account is divided by the total number of units in the site. (Including both restricted and non-restricted units)

T2.4.4 Replacement and Operating Reserves General Note

Many Funders require that Owners maintain a replacement and operating reserve account for each project. Funds typically are required to be held in separate interest-bearing accounts. Review your specific loan and regulatory agreements for your project requirements and/or call your Funder(s) to confirm requirements such as minimum annual deposits and account restrictions. The City of Seattle, King County, Snohomish County, and City of Tacoma all require that you submit copies of year end bank statements for reserve accounts that verify and match with Tables 4(a) and 4(b) reporting.

T3. Table 4(a)—Replacement Reserve

Track your replacement reserve deposits and withdrawals.

1 Table 4 (a) Replacement Reserve				
Deposits and Withdrawals During the Period ending December 31, 2019				
				Last Year's Ending Balance: \$0.00
				Beginning Balance: \$0.00
Date	Explain All Withdrawals& Deposits	Withdrawal	Deposit	Reserve Balance
12/31/2019 <small>mm/dd/yyyy (e.g 01/01/1991)</small>	Annual Replacement Reserve Deposit from Table 4 (withou	<input type="text"/>	<input type="text"/>	
12/31/2019 <small>mm/dd/yyyy (e.g 01/01/1991)</small>	Annual Bank Interest Earned	<input type="text"/>	<input type="text"/>	
Add Rows				
				Ending Balance: \$0.00
Replacement Comments				

WBARS will carry forward the Last Year's Ending Balance as reported by you in the previous year. If for any reason Last Year's Balance was incorrect, please correct in the current year report with "an adjustment to last year's balance" and explain clearly why the adjustment was needed. You must

input the Beginning Balance amount as of 1/1 from your bank records—this amount should be the same as Last Year’s Ending Balance at 12/31. Do not round figures, put in exact amounts as verified by year end bank statements. If the balances do not match you will get a warning that requires you to explain the discrepancy in the “Comments” field.

The Annual Replacement Reserve Deposit field will auto-populate from the Replacement Reserve line item amount on Table 4. Be careful to not list annual deposits twice. Do NOT show “deposits in transit”. If a reporting year deposit does not show on the 12/31 bank statement, then do not show it on the current year’s report. You may explain “deposits in transit” in the Comments section, to confirm that required deposits were made a few days late. In the annual Bank Interest Earned field, enter the total annual bank interest earned on this reserve account. Please do not add a separate line entry for each interest deposit to the account. In the row provided, enter any other deposits made in the reporting year that were not paid out of operating funds (add rows as necessary). For example, this might be a deposit made from your development or agency funds at building start-up to capitalize reserves, or an amount from a Funder or fundraising effort specifically to build reserves. Enter the appropriate date in the date field. In the same row area, enter any uses of reserves/withdrawals made in the reporting year (add rows as necessary). Enter the appropriate date in the date field. Explain clearly what all withdrawals were used for. Replacement Reserves should be used only for scheduled capital improvements and/or replacements. It is okay to group similar items together with a total amount on one line.

For example, several unit floors were replaced. Rather than list each floor replacement amount separately, group all flooring together on one line. It is recommended that a 20-year schedule of reserves and/or Capital Needs Assessment (deposits and projected uses) be developed for every Site/building. Click here or copy <http://seattle.gov/housing/management/annualreport.htm> to your browser window for a sample CNA spreadsheet. In the Replacement Reserve section (4a), the Ending Balance field must MATCH bank balance as of 12/31. Send a copy of your 12/31 bank statement to your Funder as required. Click here or paste http://www.wshfc.org/managers/WBARS/WBARS_Annual_Report_Matrix.pdf to your browser window to view a matrix of supplemental documentation requirements for several of the major public funders participating in WBARS.

T4. Table 4(b) Operating Reserves

2 Table 4 (b) Operating Reserve					Last Year's Ending Balance: \$0.00
					Beginning Balance: \$0.00
Date	Explain All Withdrawals& Deposits	Withdrawal	Deposit	Reserve Balance	
12/31/2019 <small>mm/dd/yyyy (e.g 01/01/1991)</small>	Annual Replacement Reserve Deposit from Table 4 (withou				
12/31/2019 <small>mm/dd/yyyy (e.g 01/01/1991)</small>	Annual Bank Interest Earned				
				Ending Balance:	\$0.00

Operating Comments

In the Table 4(b) Operating Reserves section, track your operating reserve deposits and withdrawals.

WBARS will carry forward the Last Year 's Ending Balance as reported by you in the previous year. If for any reason Last Year 's Balance was incorrect, please correct in the current year report with "an adjustment to last year 's balance" and explain clearly why the adjustment was needed.

You must input the Beginning Balance amount as of 1/1 from your bank records—this amount should be the same as Last Year 's Ending Balance at 12/31. Do not round figures, put in exact amounts as verified by year end bank statements. If the balances do not match you will get a warning that requires you to explain the discrepancy in the "Comments" field.

The Annual Operating Reserve Deposit field will auto-populate from the Operating Reserve line item amount on Table 4. Be careful to not list annual deposits twice. Do NOT show "deposits in transit". If a reporting year deposit does not show on the 12/31 bank statement, then do not show it on the current year's report. You may explain "deposits in transit" in the Comments section, to confirm that required deposits were made a few days late.

In the Annual Bank Interest Earned field, enter the total annual bank interest earned on this reserve account.

In the row provided, enter any other deposits made in the reporting year that were not paid out of operating funds (add rows as necessary). For example, this might be a deposit made from your development or agency funds at building start-up to capitalize reserves, or an amount from a Funder or fundraising effort specifically to build reserves.


Enter the date and any uses of reserves/withdrawals made in the reporting year. Explain clearly what all withdrawals were used for. Operating Reserves should be used only for unexpected or unusual operating costs that exceeded the yearly operating budget.

The Ending Balance field in 4(b) must MATCH bank balance as of 12/31. Send a copy of your 12/31 bank statement to your Funder as required. Check the Matrix of Supplemental Annual Report Materials to see if your funder requires this documentation.

Sites

The “Sites” page has the list of all sites where the site details shown in a tabular view and you can view the details of any site by clicking on the site name listed.

S1. How to view sites?

To view the list of sites you can click on the  sites icon under the menu bar where “ALL SITES” page will be shown having the site details. Under “ALL SITES” you can see the list of site details where the details shown varies based on the user login. Not all the users can see the same set of information and has the similar access as the access varies based on the user types or the hierarchy.

Let’s explore Sites and the access details with respect to the user login,

S1.1 Funder

Site Name ↑	Project Name	Site Key	Site Type	Contract ID / OID	Funder Contact	Monitoring Status	Last Year Submitted
1	new	18293	Default		Migration_WSHFC Migrat...	Claim	Never
1	pro1	18295	Default	2	Migration_KC Migration...	Monitoring	Never
1 South Madelia	1 South Madelia	18196	Default		Paul Trautman, Chrysta...	Pending	2017
101 "D" Street	D Street	16927	Default	38	HFP Asset Management, ...	Monitoring	2017
10210 160th Place NE...	Adult Family Homes 5 &...	17426	Default	237	HFP Asset Management, ...	Monitoring	2017
103 N 169th St	Parkview VII	17361	Default	197	HFP Asset Management, ...	Monitoring	2017
10355 Wallingford Ave ...	Parkview VI	17347	Default		HFP Asset Management, ...	Claim	2017
105 "D" Street	D Street	17444	Default	38	HFP Asset Management, ...	Monitoring	2017
10706 Beardside Pl	Parkview VI	17353	Default	186	HFP Asset Management, ...	Monitoring	2017
11210 SE 213th St	Parkview II	17374	Default	128	Joanne Quinn, HFP Asse...	Monitoring	2017

The above screenshot is the Sites listing page of the Funder where they have the access to view the overall sites in the WBARS.

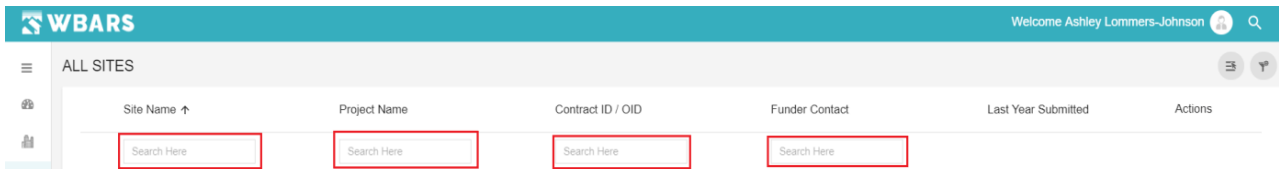
S1.2 Contractor / Manager

Site Name ↑	Project Name	Contract ID / OID	Funder Contact	Last Year Submitted	Actions
1	new		Migration_WSHFC Migrat...	Never	
1	pro1		Migration_KC Migration...	Never	
33 Oakes	Everett Affordable Hou...		Michael Soper, Tina Il...	2017	
33 Rucker Apartments	Everett Affordable Hou...		Michael Soper, Tina Il...	2017	
Apr 07	Apr 07		Lanakay Lipp	Never	
Apr 08	Apr 08		Lanakay Lipp	Never	
Apr 09	Apr 09		Lanakay Lipp	Never	
Bakerview Apartments	Bakerview Grandview Af...		Marji Johnson	2017	
Bridge Creek 1 Apartme...	Everett Affordable Hou...		Michael Soper, Tina Il...	2017	
Broadway Plaza	Broadway Plaza		Lanakay Lipp	2017	
Douglas Grove	Everett Affordable Hou...		Michael Soper, Tina Il...	2017	
Evergreen Cottages	Evergreen Cottages		Tina Iivonen, Complian...	2017	
Evergreen Village Seni...	Evergreen Village Seni...		Ken Katahira, Complian...	2017	

The above screenshot is the Sites listing page of the Contractor / Manager where they can view all the sites associated with their organization.

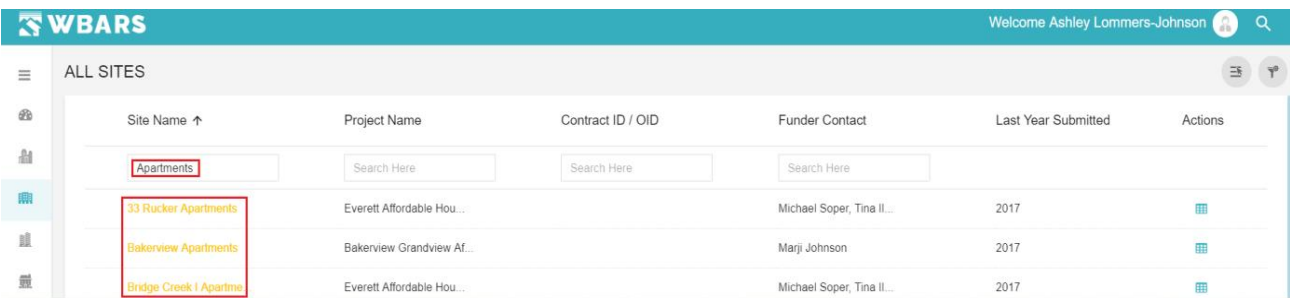
S2. How to search a Site?


You can see a search field placed under each column title where you can search by typing in the field which yields the results based on the input you give in the search field. The search field is highlighted in the image below,




Once you type any character in the search field the list will be drilled down where the relevant result will be shown.

For Example – I have typed “Apartments” in the search field under the column title “**Site Name**” where the sites having the word “Apartments” will be shown as results.



If you want to view the default list just clear / Delete the characters typed in the search field or click on “**Clear Filter**” icon at  the top right corner which clears all the filter and brings back the page to default.

S3. Show / Hide Columns

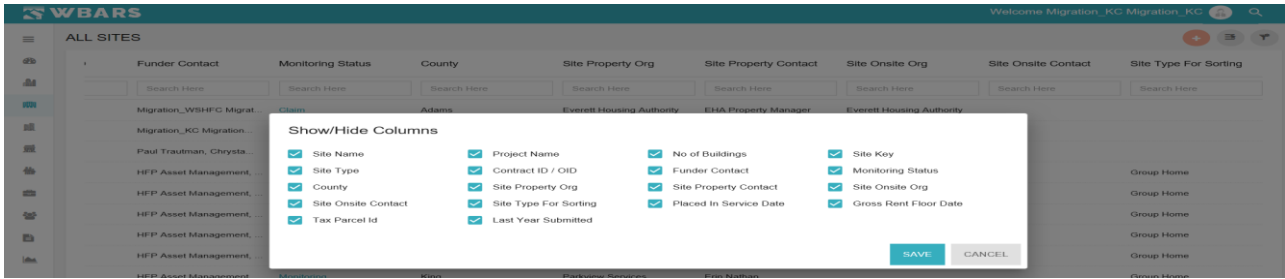
You can customize the columns which are shown under “**ALL SITES**”. Click on “**Select the Column**” Icon  where a pop up with the option to choose the required columns to display will be shown.

The below image shows the columns highlighted which can be customized.



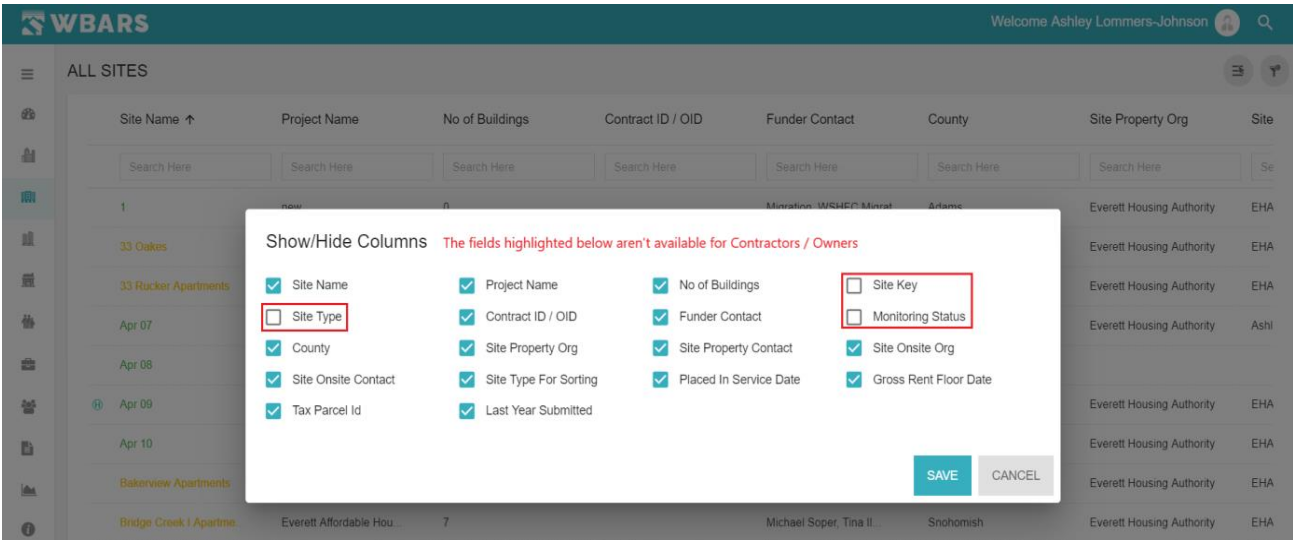
The access to choose the required fields is different for a Funder and Contractor / Manager. Let’s see the access details below,

S3.1 Funder



As a funder, you can choose all or any required fields by Clicking on the Check box. You can Select / Unselect any field and click on “SAVE” to save all the changes done or “CANCEL” to unsave the changes.

S3.2 Contractor / Owner

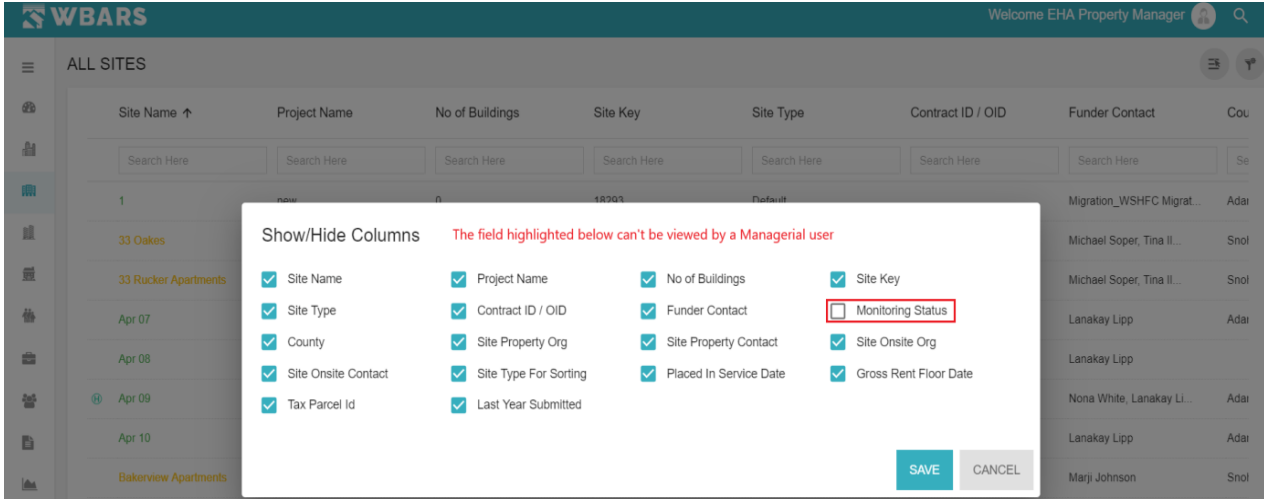


The Contractor / Owner have the same set of fields to choose, though they choose the following fields,

- Site Type
- Site Key
- Monitoring Status, will not get saved or these fields will not be shown as they aren't available


For Contractor / Owner, You can Select / Unselect any field and click on “SAVE” to save all the changes done or “CANCEL” to unsave the changes.

S3.3 Manager



As a Manager, you can't view the "Monitoring status" even if you select it and save, the checkbox will be cleared automatically. You can Select / Unselect any field and click on "SAVE" to save all the changes done or "CANCEL" to unsave the changes.

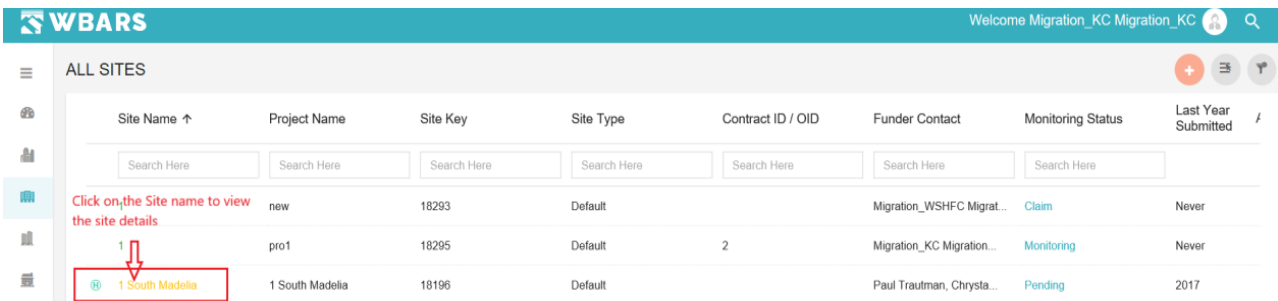
S4. Clear Filter

"Clear Filter" performs a common task for all users where clicking on the clear filter icon  clears the "Search Field" ie. the set filter criteria will be cleared and restored to default.

S5. How to view the Details of a specific site?

To view the details of a specific site you can click on the site name where the details of that site can will be shown.

For Example: "1 South Madelia" is the site which you want to view then you will click on the name itself where the site details will be shown.



Once you click on "1 South Madelia" the Site details page will be shown where all the user can view the site details but the access to change or edit can be done only by the Funder if the project is claimed by him.

The Site details page and the access is explained below,

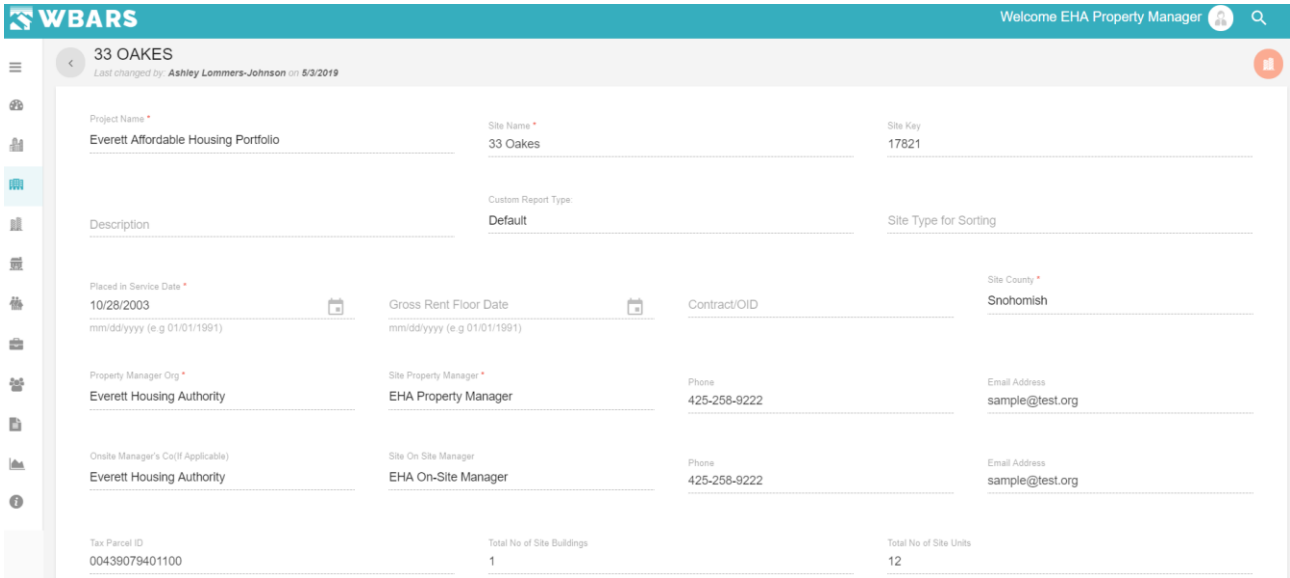
S5.1 Funder

The funder has the access to edit / change the site details only for the projects which are claimed. The above screenshot is the view of site details page of a funder where they can edit change the fields which aren't highlighted in the above image. The highlighted fields are prefetched which can't be changed in the sites detail page.

S5.2 Contractor / Owner

The **Contractor / Owner** will have the access to change **Site Property Manager and Onsite Manager**.

S5.3 Manager



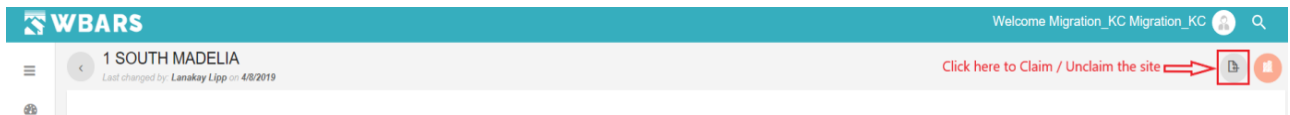
The Managers will have view only access.

S6. Claim / Unclaim

As mentioned earlier the funder can have the access to edit / change the site details only if it is claimed.

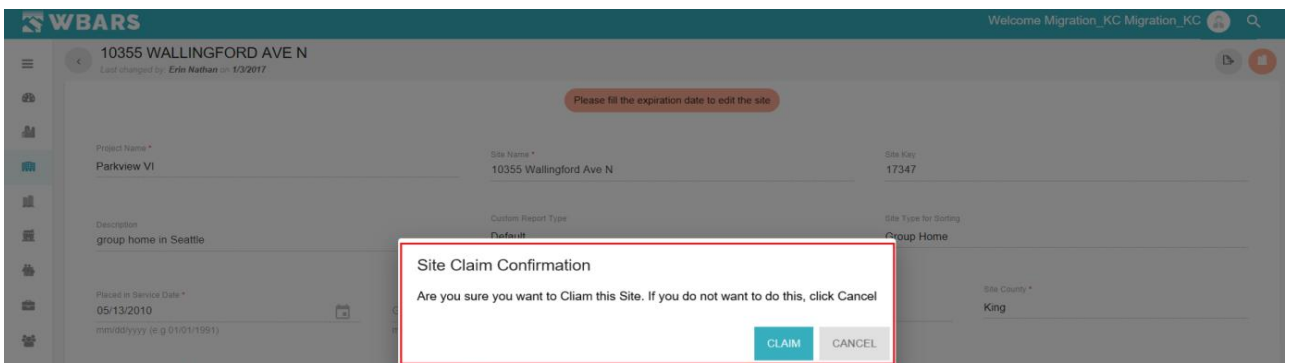
S6.1 How to claim / Unclaim a Site?

To claim / Unclaim a Site click on this icon . The location of this icon is shown in the image below,




Claim

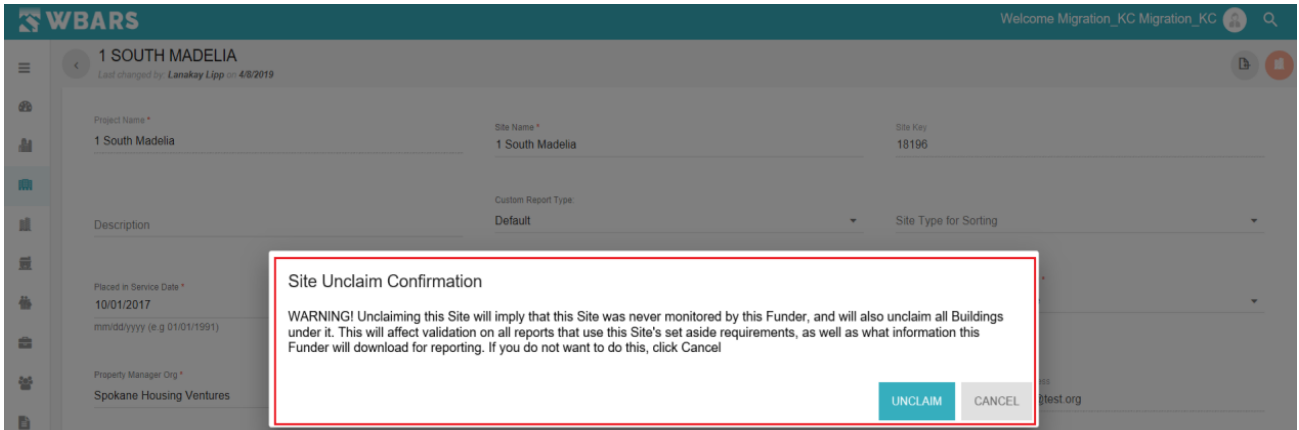
Once you click on the icon to claim the site you will be shown a “Site Claim Confirmation” pop up requesting your confirmation to claim the site as shown in the image below,



If you wish to claim the site, you can click on **“CLAIM”** or click on **“CANCEL”**.

Unclaim

You can unclaim the site which is claimed by you. Same as claiming the site you need to click on the Claim / Unclaim  icon and you will be shown a **“Site Unclaim Confirmation”** pop up requesting your confirmation to Unclaim the site as shown in the image below,




If you wish to claim the site, you can click on **“UNCLAIM”** or click on **“CANCEL”**.

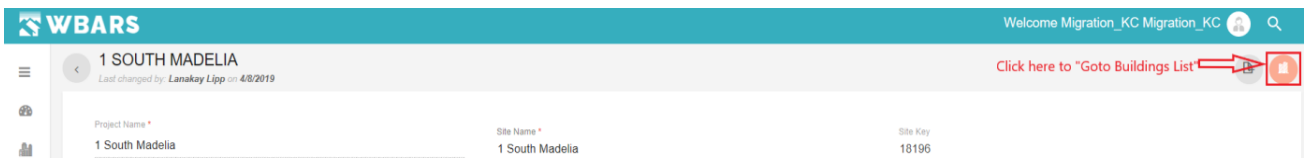
S7. Goto Buildings List

From the **“Sites Detail”** page you can directly view the list of buildings in that site.

S7.1 How to view the Buildings List?

To view the buildings list of a Site, click on the **“Site Name”** and the details of the site which you have chosen will be shown.

For Example – Click on **“1 South Madelia”** under the site name where its details will be shown. In the top right corner, you can see the **“Goto Buildings List”**  icon click on that icon to view the list of **“ALL BUILDINGS”** in that site. The icon location is highlighted in the image below,



S8. Add Site


The **Funder** will have the access to add a new site

Funder

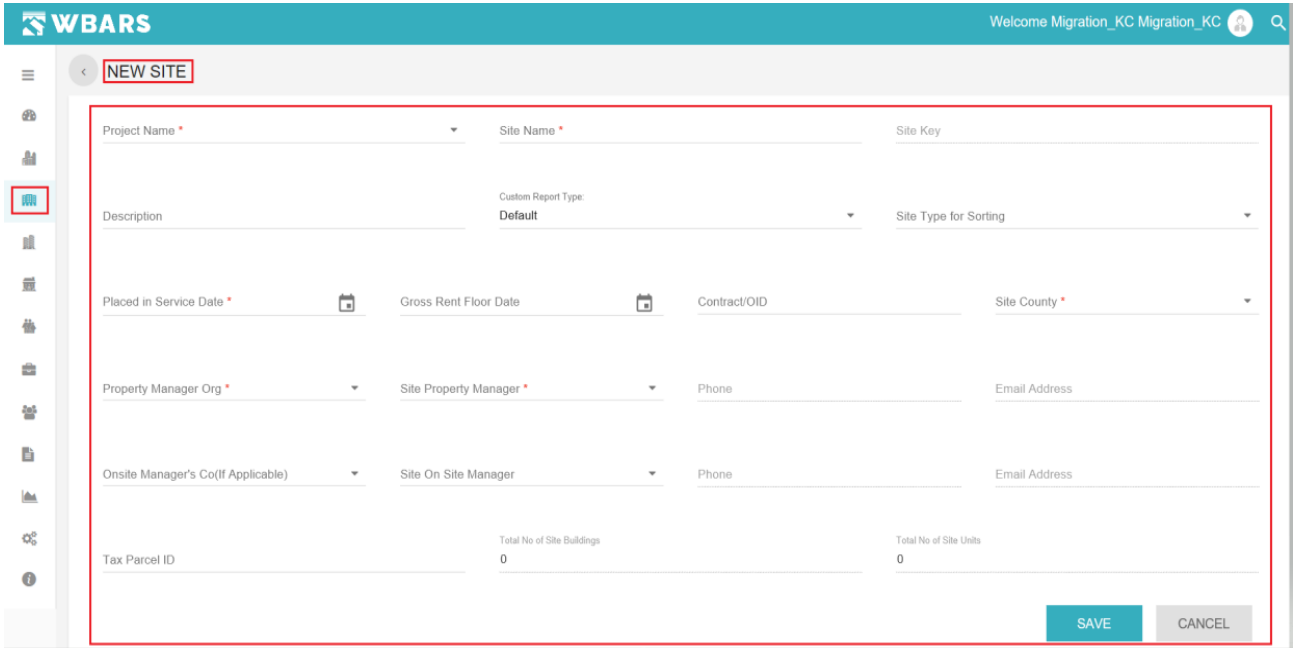
You can add a **“New Site”** by clicking on the **“Add”** icon placed at the top right corner of the page.

See the below image to identify the icon.



Step 1 – Click on the “Add”  Icon

The page to enter the “New Site” details will be shown as in the image below,



In the “NEW SITE” page you will enter all the required details and hit “SAVE” to create a new site.

The fields requested are,

1. Project Name	2. Site Name	3. Description
4. Custom Report Type	5. Site Type for Sorting	6. Placed in Service Date
7. Gross Rent Floor Date	8. Contract ID / OID	9. Site County
10. Property Manager Org	11. Site Property Manager	12. Onsite Manager’s org
13. Site On Site Manager	14. Tax Parcel ID	15. Save / Cancel

S8.1 Project Name

Project Name *

The project name is a dropdown field where you will click on the field and choose the project name.

You can’t create a site without entering this field as this is a mandatory field.

If you click on save without entering the project name you will be shown with a warning message as in the image below,



S8.2 Site Name



The site name is entered here in this field and this is a mandatory field. If you save without entering a site name you will be shown with a warning message as in the image below,

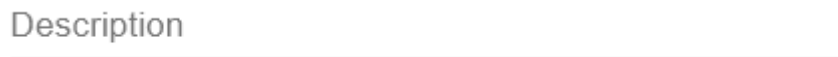


S8.3 Site Key



This field can't be accessed.

S8.4 Description



You can provide the site description if any. This is a non-mandatory field and you can create a site without entering details in this field.

S8.5 Custom Report Type



Custom Report type can be Default / Alternate / Farmworker. You can choose the site report type.

Can choose of the Report Type Default, Alternate or Farmworker. (Selecting "Alternate" or "Farmworker" will not allow Table 1 requirement for any Funder text will appear when Editing Sites and Buildings page)

Default: Table 1,2,3 and 4

Alternate: Table 2,3 and 4

Farmworker: Table 2,3 and 4

Table 2 report will be varied between Alternate and Farmworker


S8.6 Site Type for Sorting

Site Type for Sorting 

This is a dropdown field where you can click on the field and the site type for sorting will be shown and you can choose one from the dropdown list. The screenshot of the Site types is shown below,

Assisted Living	Homeless or Intensive Special Needs 24/7
DV	Manufactured Housing
Group Home	Multifamily Elderly
Homeless	Multifamily General
Homeless or Intensive Special Needs 24/7	Special Needs
Manufactured Housing	Youth/Young Adult Housing

S8.7 Place in Service Date


Placed in Service Date * 
mm/dd/yyyy (e.g 01/01/1991)

Placed in Service date should be given here. WSHFC Income and Rent limits are calculated based on this date and County.

If you save without entering a placed in service date you will be shown with a warning message as in the image below,

Placed in Service Date * 
this field is required

S8.8 Gross Rent Floor Date

Gross Rent Floor Date 
mm/dd/yyyy (e.g 01/01/1991)

You can type the date or click on the calendar icon and choose the Gross rent floor date. This is a non-mandatory field.

S8.9 Contract OID

Contract/OID

You will enter the contract / oid here and this is anon mandatory field.

S8.10 Site County

Site County *

You can click on this field and you will be shown with the list of counties from which you have choose the site county. Counties are given here will be considered for Income and Rent limit calculation. Every site in a project will be administered by Property Managers and Onsite Managers (Optional)

S8.11 Property Manager Organization

Property Manager Org *

You can click on this field to choose the property manager organization and this is a mandatory field.

If you save without entering this field you will be shown with a warning message as in the image below,

Property Manager Org *

this field is required

S8.12 Phone / Email Address

Phone

Email Address

This field gets auto filed upon choosing the Property / Onsite managers

S8.13 Tax Parcel ID


Tax Parcel ID

Tax IDs can only be entered or corrected by a Funders

Buildings

Each site has buildings where the Funder has the rights to add the buildings to a site.

B1. How to View the Buildings List?

To view the list of buildings, click on **“Buildings”**  icon under menu and the **“ALL BUILDINGS”** page having the buildings list will be shown. The list of buildings shown varies based on the user login. The screenshots of buildings page based on users is shown and explained below,

B1.1 Funders

Building Name	Site Name	Project Name	BIN	Funder Contact	Monitoring Status	Original Build Date	Address	City
1	Omak Model Farmworker ...	Omak Model Farmworker ...		Compliance Asset Manag...	Claim		80 Hendricks Road	On
1	Burke-Gilman Gardens	Burke-Gilman Gardens		Cheryl Cohen, Complian...	Claim		5251 Sand Point Way NE	Se
1	Krislen Apts	Krislen Apts		Compliance Asset Manag...	Claim	1997	9525 Cullens Rd NW	Ye
1	Caribou Trails Apartme...	Caribou Trails Apartme...		Compliance Asset Manag...	Claim	1972		
1	Vista del Sol	Vista del Sol		Compliance Asset Manag...	Claim		111 E Parkland Dr	Su
1	Casa Guadalupe	Airways Transitional Housing		Compliance Asset Manag...	Claim		1105 Bradley Street #9...	Ch
1	Airways Transitional H...	Airways Transitional H...		Lanakay Lipp, Complian...	Claim		4271 Airway Dr	Mc
1	Spring Canyon	Spring Canyon		Compliance Asset Manag...	Claim		106	Gr
1	Woods Creek Village	Woods Creek Village		Tina Iivonen, Complian...	Claim		316 E Fremont St	Mc
1	Quixote Village	Quixote Village		Compliance Asset Manag...	Claim	2013	3350 Mottman Road	Oh
10	Quixote Village	Quixote Village		Compliance Asset Manag...	Claim	2013	3350 Mottman Road	Oh

“ALL BUILDINGS” is the page title where the buildings and the related details are listed. The Funders have the access to view the list of all buildings in the WBAR system. In the above image you can see the list of

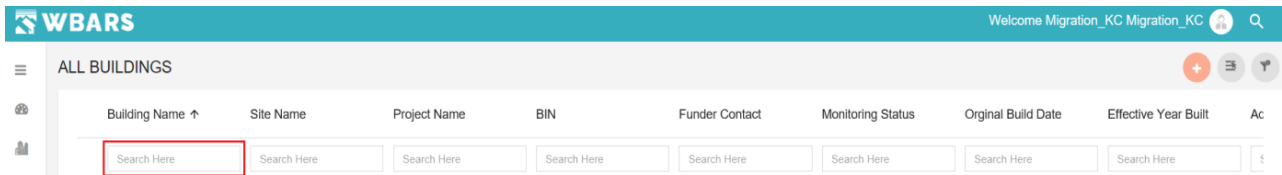
B1.2 Contractors / Managers

Building Name	Site Name	Project Name	BIN	Funder Contact	Original Build Date	Address	City
12705 Avondale Way	Evergreen Village Seni...	Evergreen Village Seni...		Ken Katahira, Complian...		12705 Avondale Way	Ever
B-1	Apr 07	Apr 07		Lanakay Lipp			Abbr
B-1	Apr 09	Apr 09		Nona White, Lanakay Li...		1 South Ave	Abbr
B-1	Site 2	Apr 09		Nona White, Lanakay Li...			
B-1	Site 1	Apr 10		Lanakay Lipp			
BA	Apr 10	Apr 10		Lanakay Lipp			
BA-2	Apr 10	Apr 10		Lanakay Lipp			
build	z	z		Migration_WSHFC Migrat...			
build	new	new		Migration_WSHFC Migrat...			
build-1	latest	latest		Lanakay Lipp, Migratio...			
building	new test	new test		Lanakay Lipp			

The **Contractors / Managers** can view the list of all buildings associated with their organizations.

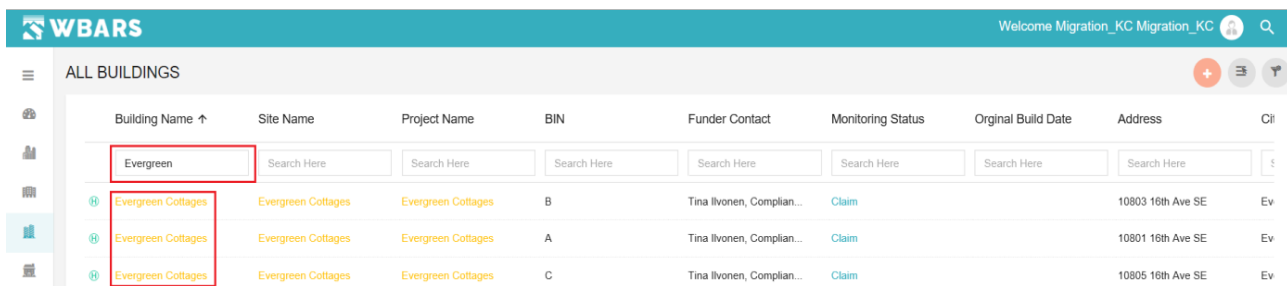
B2. How to search a Building?


You can see a search field placed under each column title where you can search by typing in the field which yields the results based on the input you give in the search field or you can use the **Global Search**. The search field for searching a building is highlighted in the image below,




Once you type any Building Name in the search field the list will be drilled down where the relevant buildings having the character / word / Name which you typed will be shown as the result.

For Example – I have typed “Evergreen” in the search field under the column title “**Building Name**” where the buildings having the word “Evergreen” will be shown as results.

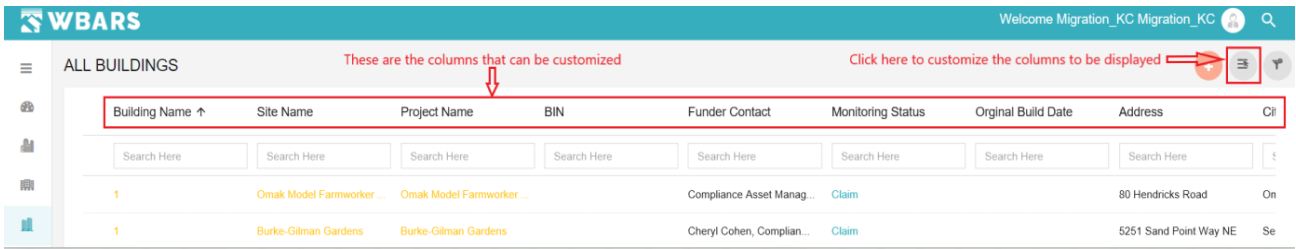


If you want to view the default list just clear / Delete the characters typed in the search field or click on “**Clear Filter**” icon at  the top right corner which clears all the filter and brings back the page to default.

B3. Show / Hide Columns

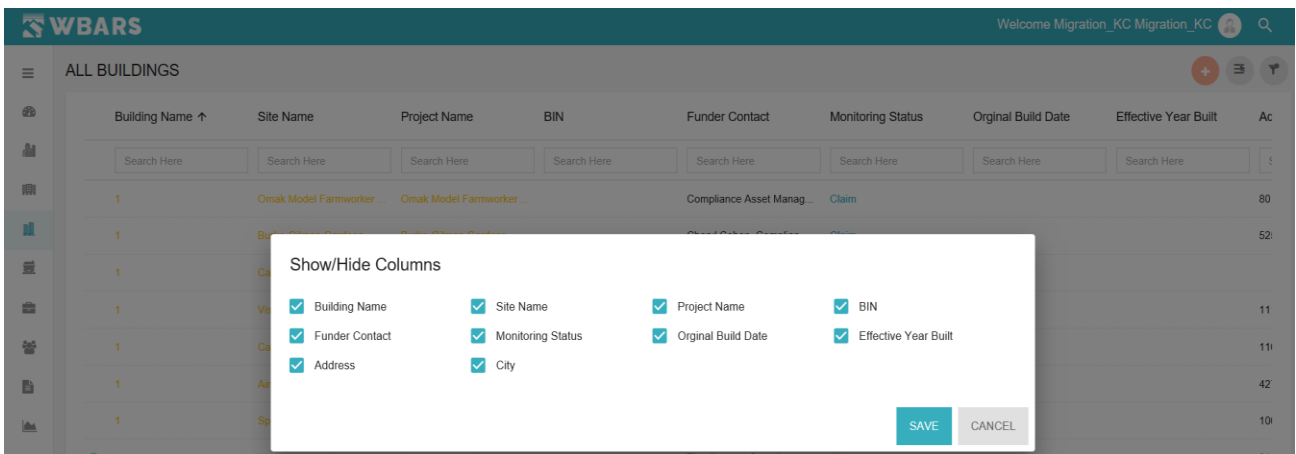
You can customize the columns which are shown under “**ALL BUILDINGS**”. Click on “**Select the Column**”  Icon where a pop up with the option to choose the required columns to display will be shown.

The below image shows the columns highlighted which can be customized.



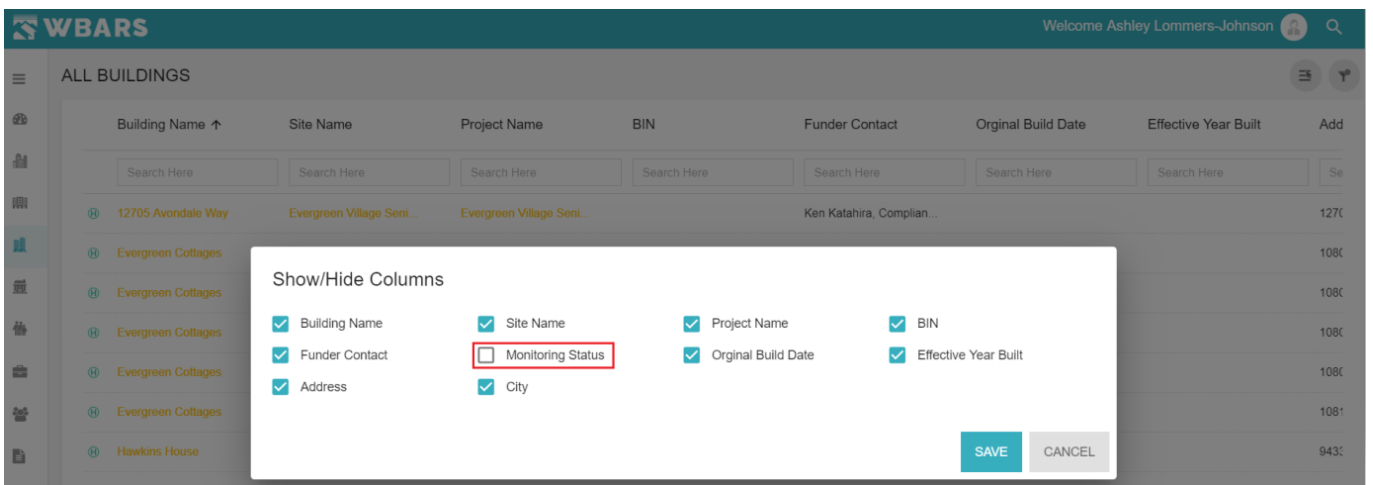
The access to **“Select the Columns”** is different for a Funder and Contractor / Manager. Let’s see the difference in the access below,

B3.1 Funder



As a funder, you can choose all or any required fields by Clicking on the Check box. You can Select / Unselect any field and click on **“SAVE”** to save all the changes done or **“CANCEL”** to unsave the changes.

B3.2 Contractor / Manager



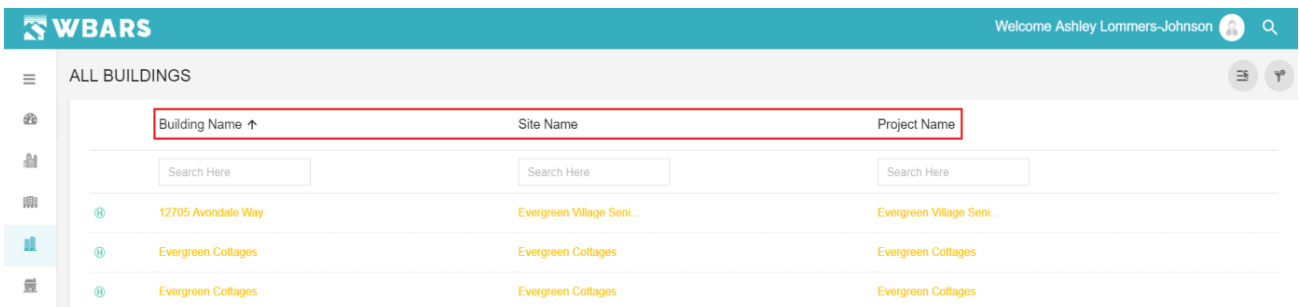
“Monitoring Status” is not available for a Contractor / Manager. The option to choose **“Monitoring Status”** will be shown but even if the option is checked and saved the option gets unchecked by itself as you have no permission or access to monitor.

You can Select / Unselect any field and click on **“SAVE”** to save all the changes done or **“CANCEL”** to unsave the changes.

Only the columns which you have selected will be shown under **“ALL BUILDINGS”**

For Example – “Building Name”, “Site Name”, “Project Name” are the columns which you need to view so you can check those columns under **“Select the Columns”** and click on **“SAVE”** where only those 3 columns will be shown.

See the below images where we have selected the above-mentioned columns and only those columns are shown under **“ALL BUILDINGS”**



B4. Clear Filter

“Clear Filter” performs a common task for all users where clicking on the clear filter icon

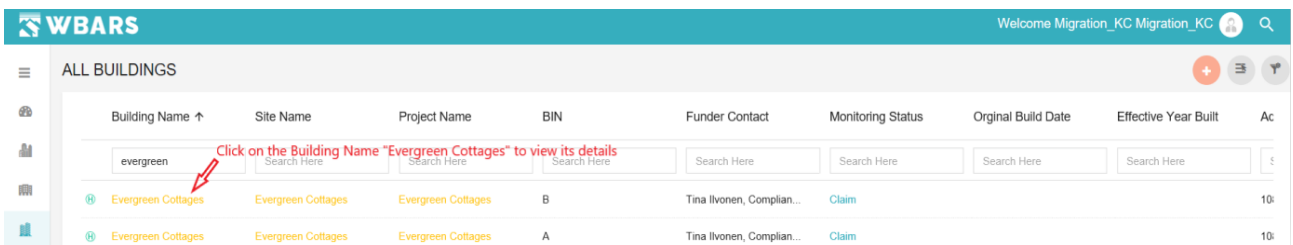


clears the **“Search Field”** i.e. the set filter criteria will be cleared and restored to default.

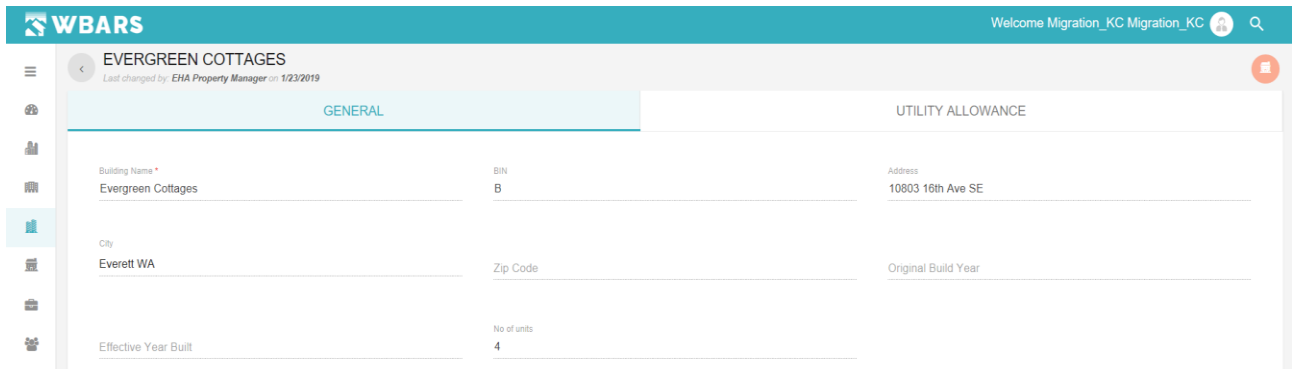
B5. How to view the details of a Building?

You can click on the **“Building Name”** to view the details of that building. If you are aware of building name you can search the building by name and click on it where its details will be shown.

For Example – “Evergreen Cottages” is the building name you can click on the name where its details will be shown. Please refer the below image for better understanding,



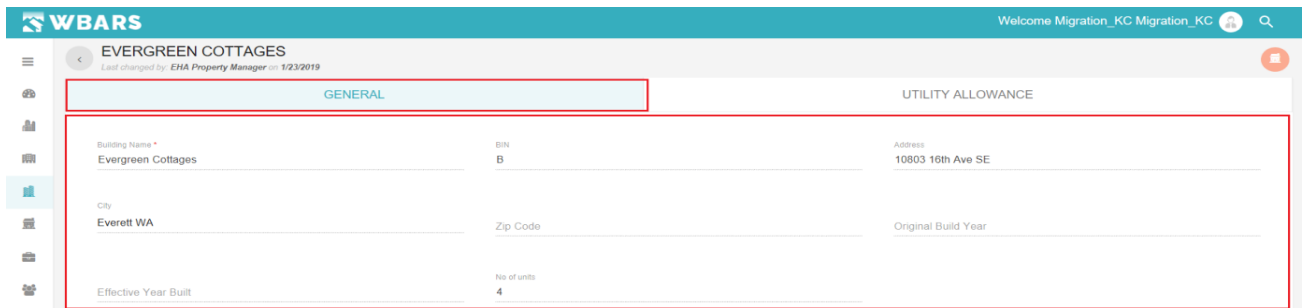
The details of **“Evergreen Cottages”** will be shown as in the image below,



The building details has two categories. They are,

- General
- Utility Allowance

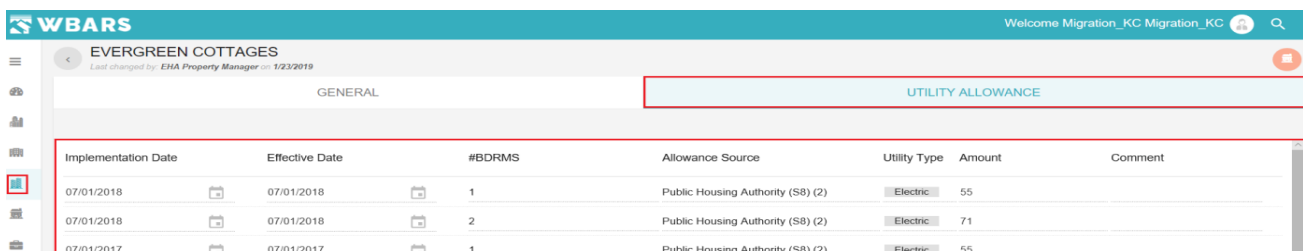
B5.1 General



The General tab of building details page shows the generic information

- Building Name
- BIN
- Address
- City
- Zip code
- Original Build Year
- Effective Build Year
- No. Of Units

B5.2 Utility Allowances



The “Utility Allowances” shows the details of the allowance of the utilities and has the following details,

- Implementations Date
- Effective Date
- Bed Rooms (#BDRMS)
- Allowance Source
- Utility type
- Amount
- Comment

The building details shown are same for all the user where the access to the fields are different. The user details and access are shared below,

B5.3 Funder

The screenshot shows the WBARS interface for a Funder user. The page title is "12705 AVONDALE WAY" and it was last changed by "EHA Property Manager" on 1/23/2019. The "GENERAL" tab is selected, displaying the following fields: Building Name (12705 Avondale Way), City (Everett WA), Effective Year Built, BIN, Zip Code, and No of units (40). The "UTILITY ALLOWANCE" tab is also visible, displaying the Address (12705 Avondale Way) and Original Build Year fields.

The Funders will have access to view only where the can't edit any fields.

B5.4 Contractor / Manager

B5.4.1 General

The screenshot shows the WBARS interface for a Contractor/Manager user. The page title is "12705 AVONDALE WAY" and it was last changed by "EHA Property Manager" on 1/23/2019. The "GENERAL" tab is selected, displaying the following fields: Building Name (12705 Avondale Way), City (Everett WA), Effective Year Built, BIN, Zip Code, and No of units (40). The "UTILITY ALLOWANCE" tab is also visible, displaying the Address (12705 Avondale Way) and Original Build Year fields. Red boxes highlight the Effective Year Built and Original Build Year fields, indicating that these fields are not editable for this user. The interface also includes "SAVE" and "CANCEL" buttons at the bottom right.

In General section you will have the access to enter Original Build Year and Effective Year Built and the field are highlighted in the above image.

B5.4.2 Utility Allowance

- Utility Allowances (UA) should be configured in each building by Bed Room type.
- Utility Allowances can be added, edited or deleted by
 1. Monitoring Funder
 2. Property Manager
 3. Organization Administrator of Property Manager organization.
- Read Only Funders, Onsite Manager has no rights to add UA's.

Implementation Date	Effective Date	#BDRMS	Allowance Source	Utility Type Amount	Comment	Actions
06/04/2015		1	HUD Regulated Properties	15		
06/04/2015		2	HUD Regulated Properties	0		

In Utility Allowance section, you can add new UA by clicking the Add icon. And you will enter the following details to create the UA.

- Implementation Date
- Effective Date
- #BDRMS
- Allowance Source
- Utility Type Amount
- Comment
- Actions

UA1. Implementation Date

Implementation Date

05/03/2019



The effective date from which the system will take in for consideration is the implementation date where you can enter the date in this field by typing or you can click on the calendar icon and choose the date.

UA2. Effective Date

Effective Date

05/03/2019

The date with which the UA is added into the buildings is the effective date where you can enter the date in this field by typing or you can click on the calendar icon and choose the date.

UA3. #BDRMS (Bedrooms)

#BDRMS

3

You can choose the number of bedrooms in the unit from the dropdown and that is the bedroom type.

UA4. Allowance Source

Allowance Source

Energy Consumption Model (3) ▾

The list of all allowance sources will be shown here where you can click on the dropdown and choose the required Allowance Source.

UA5. Utility Type

Utility Type

Electric Gas Oil ▾

The utility type is a multi-choose where you can select the required utility type from the dropdown. Choose any of the utility type like Electricity, Garbage, Gas, Oil, Other, Sewer, Water

UA6. Amount

Amount

55

Fill in the UA amount for that bedroom size in the Amount field. If your UA is “Owner pays all utilities” you must put a zero in the amount box.

UA7. Comment

Comment

Add any helpful comments regarding that UA in the Comment field. For example, you could comment “electric heat, gas central hot water, electric cooking” to explain the fuel sources in determining the utility allowance


UA8. Actions

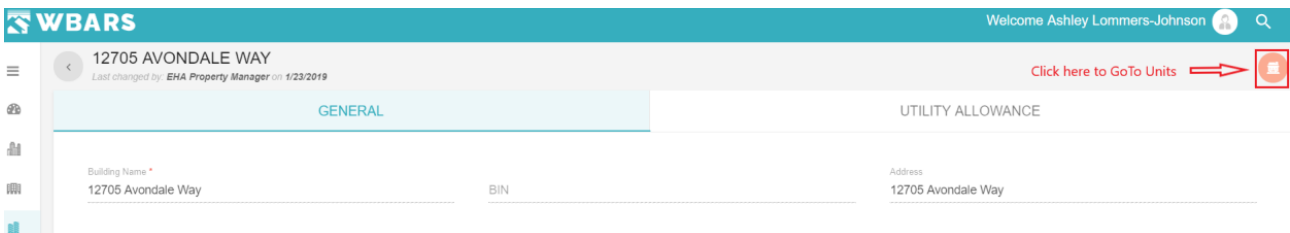
Actions



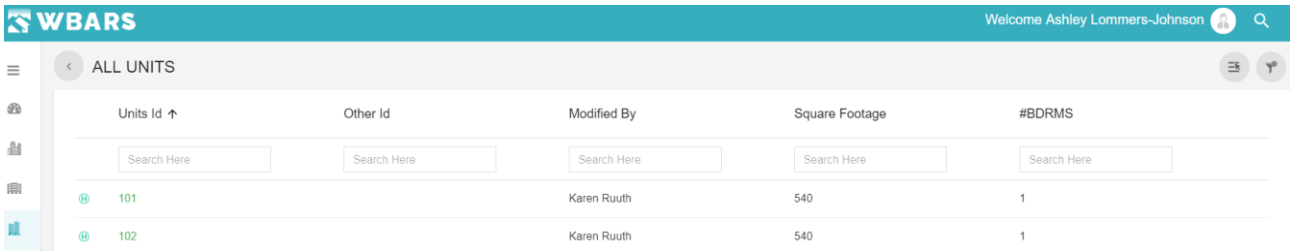
Under actions you will have the delete icon where you can delete the created UA.

B6. Goto Units List

All the users will have the access to “**Goto Units List**” from the Buildings Details Page. Click on this button  and the Units list page will be shown. The location of the button is showed in the screenshot below,



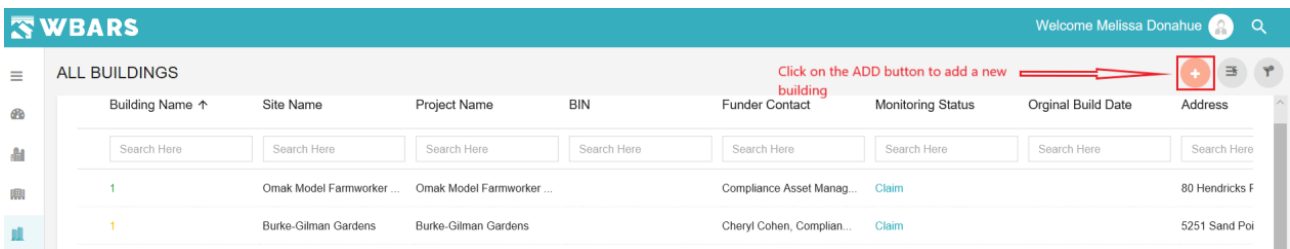
Once you click on the **Goto Units List** button the **“ALL UNITS”** page gets opened as shown in the image below,



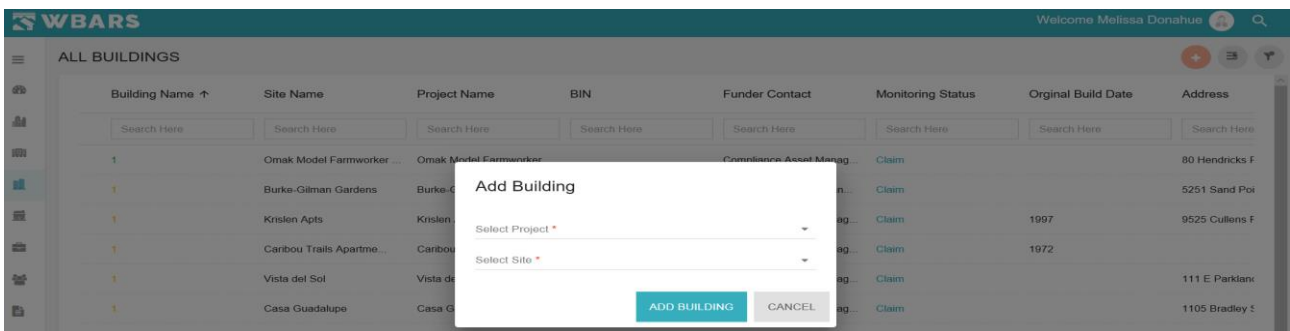
You can open the units by clicking on the unit id

B7. How to Add a Building?

Step 1 - To add a new building, you will click on the **ADD** button. The location of the button is shown in the image below,

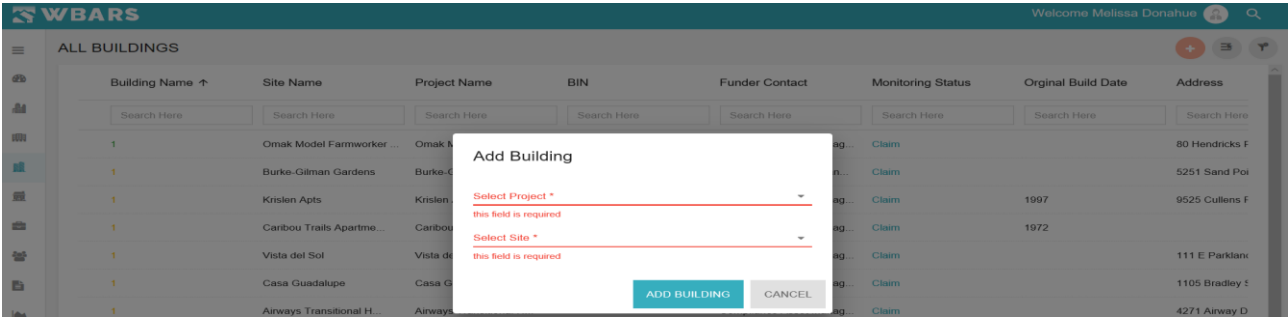


Step 2 - After you click on the add button you will be shown with the options to select project and site as shown in the image below,

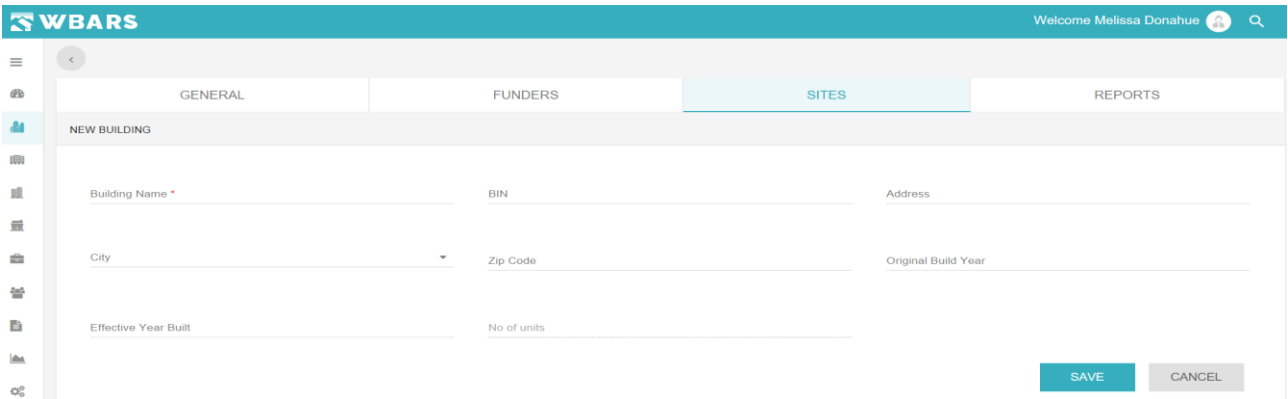


Step 3 - Select the Project and Site and click on **“ADD BUILDING”**. If you didn’t select anything and if you click **“ADD BUILDING”** you will be shown with a warning message as shown in the image below,

1,



Step 4 – After you choose both project and site and click “ADD BUILDING” the page to add building details under site will be shown.



You will enter the following details to create the building,

1. Building Name	2. BIN	3. Address
4. City	5. Zip Code	6. Original Build Year
7. Effective Year Built	8. No of Units	

From the above fields only the Building name is mandatory to create the building

B7.1 Building Name

Building Name *

The building name will be entered in this field

B7.2 BIN

BIN

The building identity number will be entered here, this is a non-mandatory field and the building can be created without providing this detail.

B7.3 Address

Address

The building address will be entered here

B7.4 City

City

The city is a dropdown list where you can click on this field the list of cities will be shown and you can choose one by clicking on it.

B7.5 Zip Code

Zip Code

You will enter the valid Zip code of the building address

B7.6 Original Build Year

Original Build Year

The original build year of the building will be entered here

B7.7 Effective Year Built

Effective Year Built


The original build year of the building will be entered here

After providing all the details you will click on the “**SAVE**” and “**ALL BUILDINGS**” page will be shown, and you can find the newly created building there and then you can add the Utility allowance for the building.

Units

The units are the parts of the buildings. Each building has units which the occupants occupy.

U1. How to view the list of Units?

The units can be viewed by clicking the unit's icon  placed under the menu. Once clicked on the unit's page "ALL UNITS" will be shown having the list of units and the related details. The unit details shown in the page are listed below with the screenshot.

- Units ID
- Building Name
- Site Name
- Project Name
- Other ID
- Square Footage
- Bedrooms (#BDRMS)
- Modified By



Units Id ↑	Building Name	Site Name	Project Name	Other Id	Square Footage	#BDRMS	Modified By
#1	Shelton Apartments	Shelton Creek Apartmen...	Shelton Creek Apartmen...		334	1	Debra Nielsen
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Nona White
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		715	2	Judy Thompson
#1	Everett Foster Home	Everett Foster Home	Everett Foster Home		100	1	Lori White
#101	10621 Bagley Ave N	Oak Manor Apts	Oak Manor Apts		572	1	Cheryl Cooper
#101	934 N 98th St	Heather Apts	Heather Apts		540	1	Cheryl Cooper
#102	10621 Bagley Ave N	Oak Manor Apts	Oak Manor Apts		572	1	Cheryl Cooper

The unit details are shown based on the login where only the Funder has the access to view all the units in the system and the Contractors / Managers will view the list of associated. The Screenshots are shared below for both,

U1.1 Funder

Units Id ↑	Building Name	Site Name	Project Name	Other Id	Square Footage	#BDRMS	Modified By
#1	Shelton Apartments	Shelton Creek Apartmen...	Shelton Creek Apartmen...		334	1	Debra Nielsen
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Nona White
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		715	2	Judy Thompson
#1	Everett Foster Home	Everett Foster Home	Everett Foster Home		100	1	Loni White
#101	10621 Bagley Ave N	Oak Manor Apts	Oak Manor Apts		572	1	Cheryl Cooper
#101	934 N 98th St	Heather Apts	Heather Apts		540	1	Cheryl Cooper
#102	10621 Bagley Ave N	Oak Manor Apts	Oak Manor Apts		572	1	Cheryl Cooper

Displaying 1 to 11 of 105401 records

As a Funder, you can view the overall list of all units in the WBARS and you will have the access to add new units.

U1.2 Contractor / Manager

Units Id ↑	Building Name	Site Name	Project Name	Other Id	Square Footage	#BDRMS	Moc
01	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A1	745	2	Stev
02	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A2	745	2	Stev
03	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A3	745	2	Stev
04	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A4	745	2	Stev
05	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A5	745	2	Stev
06	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A6	745	2	Stev
07	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A7	745	2	Stev
08	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A8	745	2	Stev
09	WA-13-00120	Pivotal Point Apartmen...	Pivotal Point Apartmen...	A9	745	2	Stev
1	WA-14-00214	Madison Villa Apartmen...	Everett Affordable Hou...		768	2	Stev
1	Lakeview Terrace Apart...	Lakeview Terrace Apart...	Lakeview Terrace Apart...		850	2	EHA

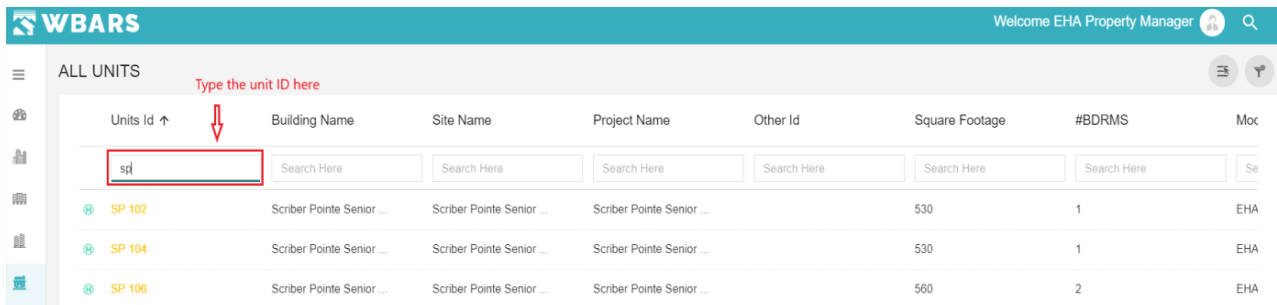
Displaying 1 to 11 of 1401 records

As a **Contractor / Manager**, You can view the list of units associated with your organization only.

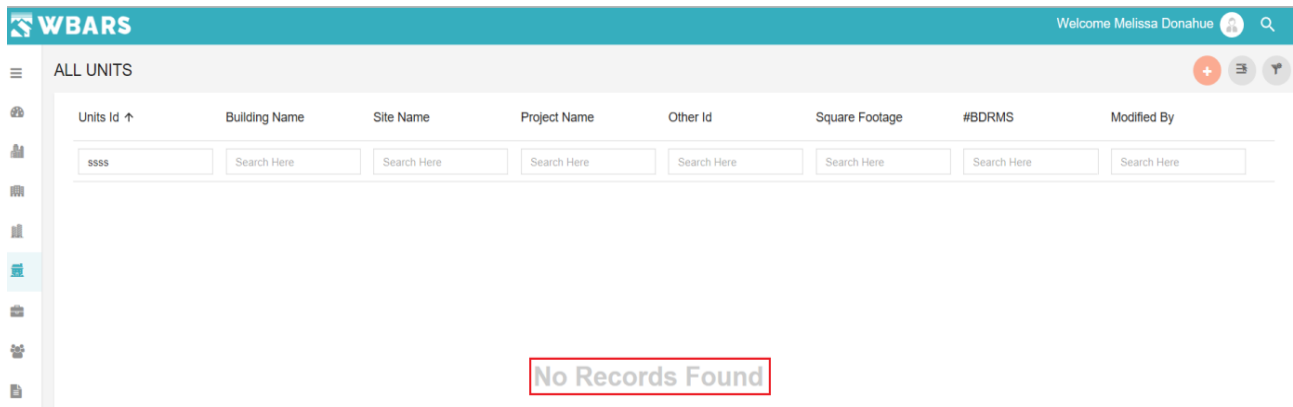
U2. How to search Unit?

The units can be searched by providing the unit name. Under “Unit ID” you can find the search field where you can type the unit name and the relevant results will be shown based on the input.

For Example – I have typed “SP” in the search field and the results are shown based on the search input and you can click on the name which you are searching for. The screenshot of the search is shared below,



Each column will have search filed where you can search for the relevant details and the results will be shown based on the given input. If you give an invalid input where the system couldn't find any records it will show you “No Records Found”. In the image below an irrelevant input is given in the search field and the system couldn't find any records.



U3. How to view the details of a Unit?

To view the details of a unit, click on the Unit ID and the details of that will be shown.

For Example – “01” is the Unit Id, you can click on the id and its details will be shown as in the image below,

The unit details have two sections. They are,

- General
- Unit History

U3.1 General

The General section shows the same field details for all the users but access to edit or change differs based on the user roles. The General sections has the following fields,

- Unit ID
- Other ID
- Area Sq. ft
- #BDRMS (Bedrooms)

The access details based on the users are explained for Funders, Contractors and managers below,

Funder

As a Funder, you can edit the following details,

- Unit ID
- Area Sq. ft
- #BDRMS (Bedrooms)

Contractor/ Manager

The screenshot shows the 'GENERAL' tab of a unit record for unit ID '01'. The 'Other ID' field contains the value 'A1' and is highlighted with a red border. Other fields include '# BDRMS' with value '2' and 'Area Sq ft' with value '745'. There are 'SAVE' and 'CANCEL' buttons at the bottom right.

The **Contractor/ Manager** has the access to edit the field “**Other ID**” and all the other fields has view only access.

U3.2 Unit History

The screenshot shows the 'UNIT HISTORY' tab for unit #1. A table lists household names, move-in dates, last certificate dates, and move-out dates. The table is highlighted with a red border.

Household Name	Move In Date	Last Cert Date	Move Out Date
Richard Tapp	07/31/2009	12/31/2010	07/10/2011
Shirley Bobo	07/15/2011	12/31/2011	10/31/2012

The “Unit History” has the following details,

- Household Name
- Move In Date
- Last Cert Date
- Move Out Date

The above field details can be viewed by all users.

U4. Add Unit

Only the **Funder** can add the unit and the Contractors / Managers will have no option to add a unit.

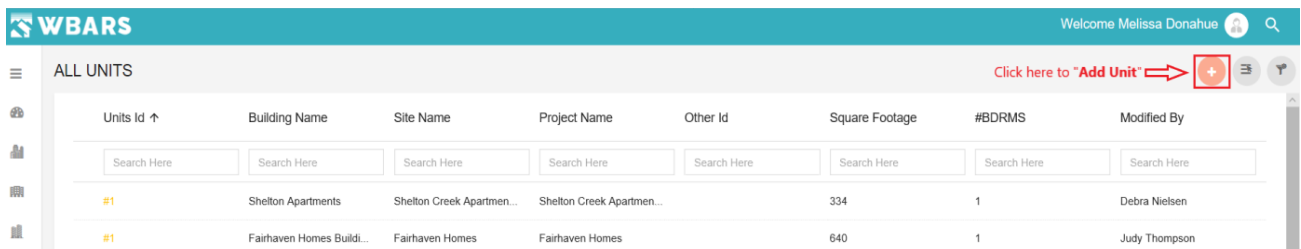
Funder

As a Funder, you can add a unit by clicking the “Add” icon  where the pop up requesting the following details will be shown,

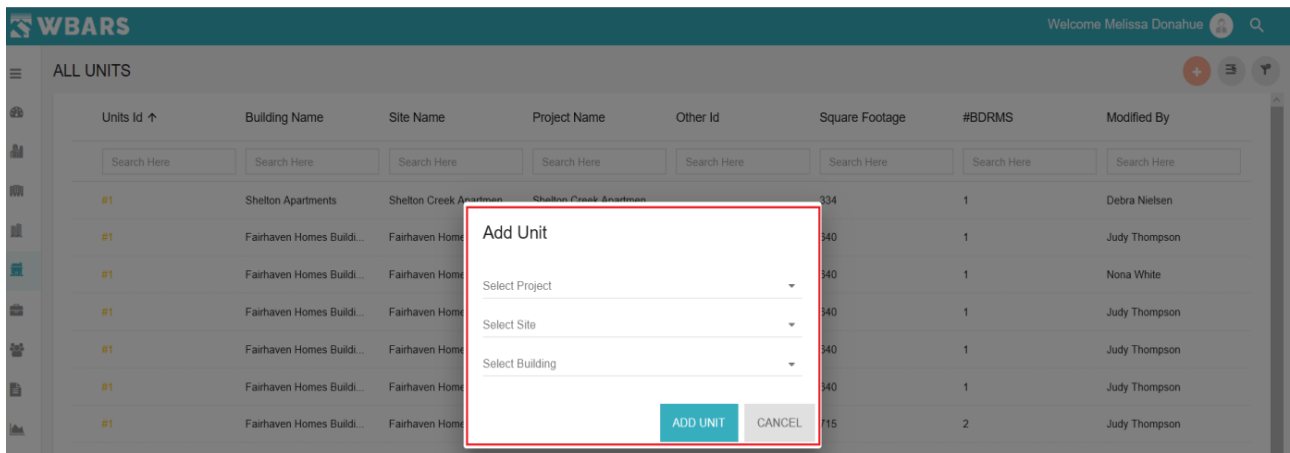
- Select Project
- Select Site
- Select Building

Let see the step by step process to “Add Unit”

Step 1 – Click on the “Add” icon



Step 2 – The popup “Add Unit” will be shown where you need to choose the required details from the dropdown to create the new unit.



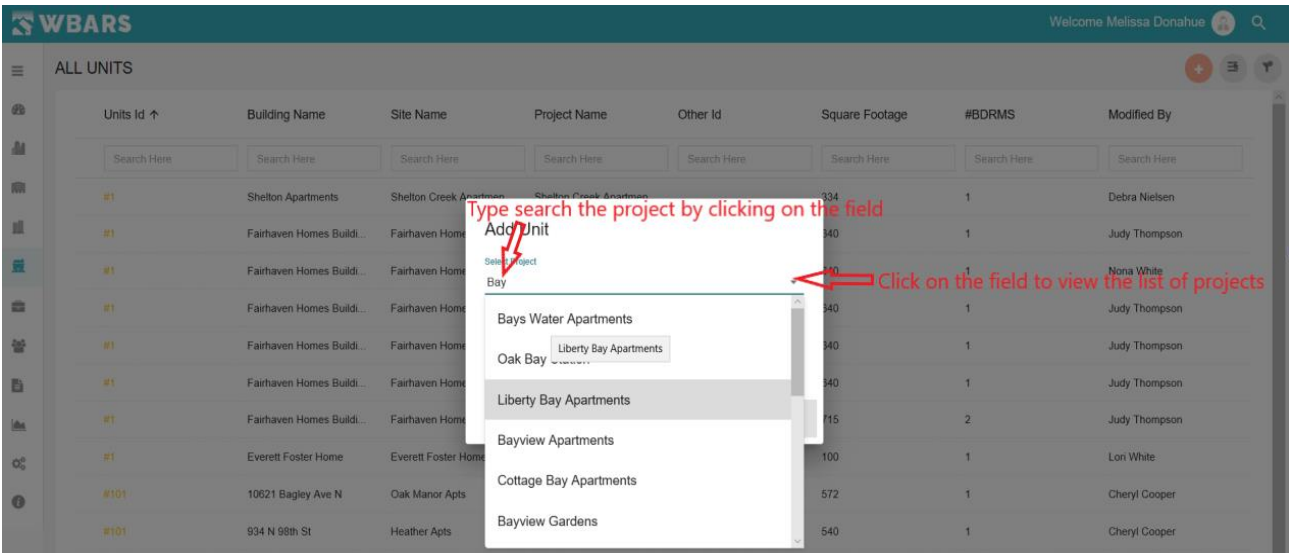
The field which are requested is a dropdown where you need to choose one from the dropdown list or you can type search and choose one from the dropdown.

U4.1 Select Project

Select Project 

“**Select Project**” has the list of all projects where you can type any part of the project name and search for it or Just click on the field to view the projects list where you can scroll and find the project.

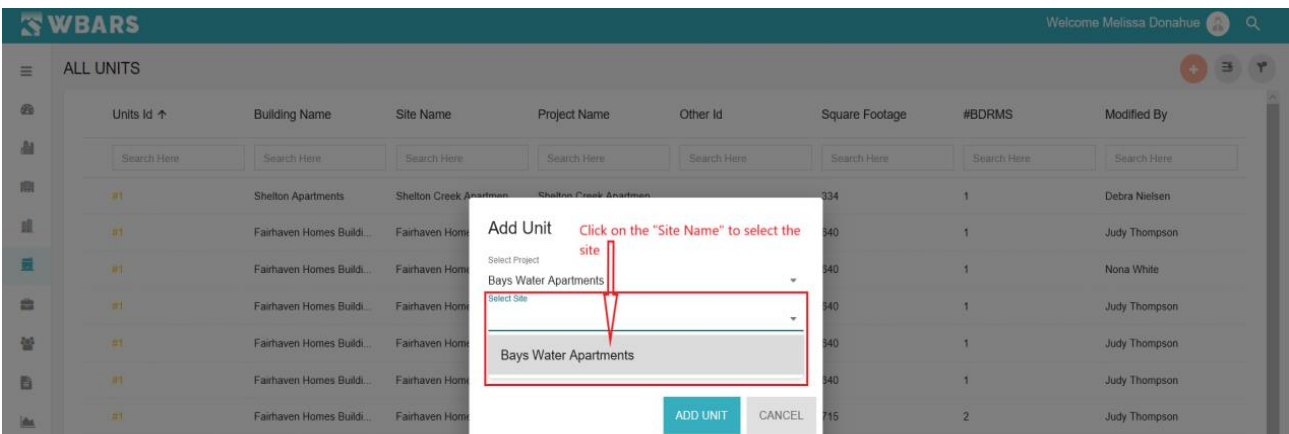
For Example - “**Bay**” is the part of a project name typed in the “**Select Project**” and the list of project having “**Bay**” in its name will be shown where you can scroll over and click on the project name you are looking to create the unit. The screenshot below has the scenario explained.



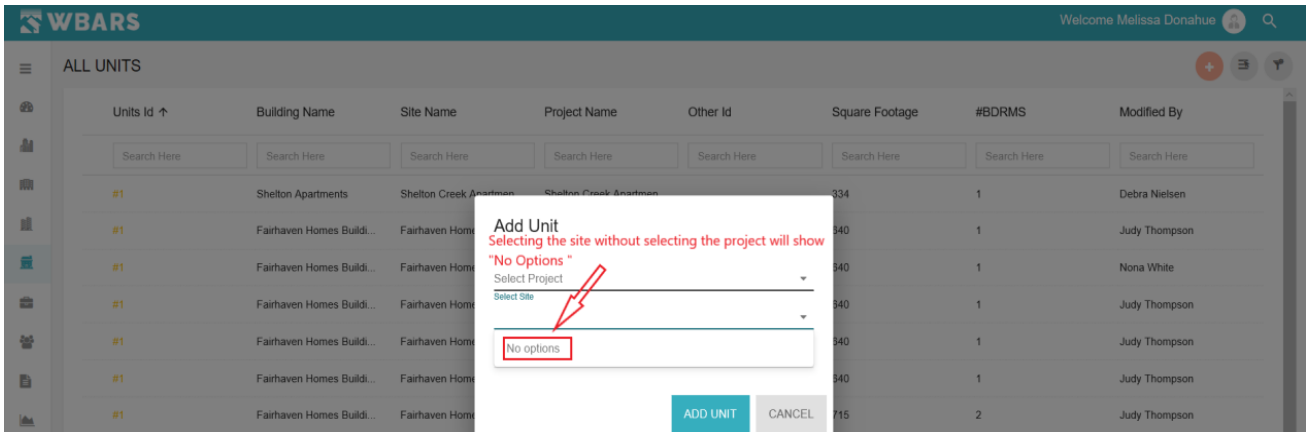
U4.2 Select Site

Select Site

After selecting the project, you will select the site. The list of sites related to the project selected will be show once you click on “**Select Site**” and here you can type search the site by any part of the site name. As per our example the selected project is “**Bays Water Apartments**” so the site related to that will be shown where the chosen project has only one site so you can click on it to select.



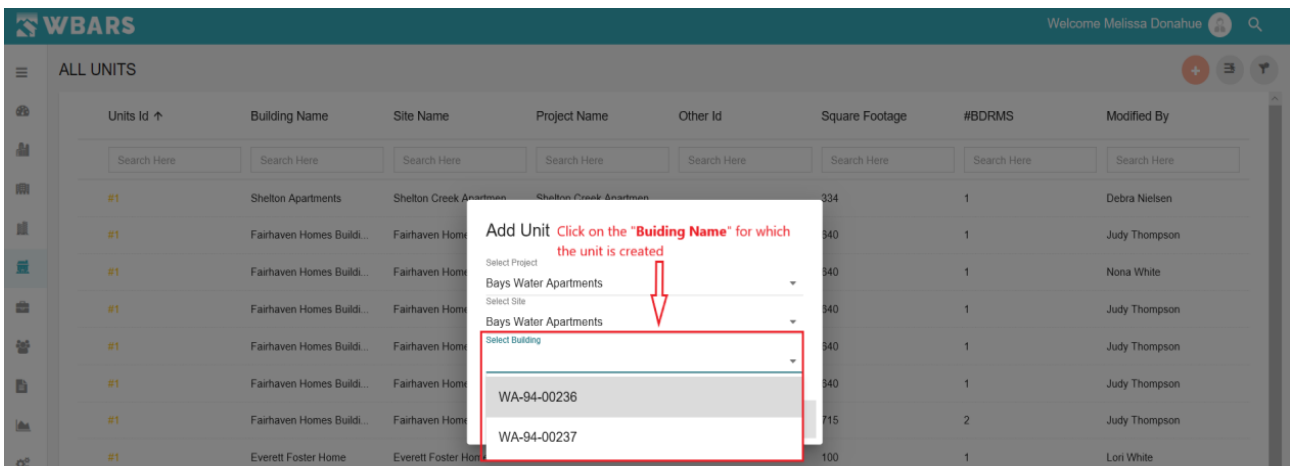
Note – You can't select a site without selecting a project. If you still proceed to select the site **"No Options"** will be shown as in the image below,



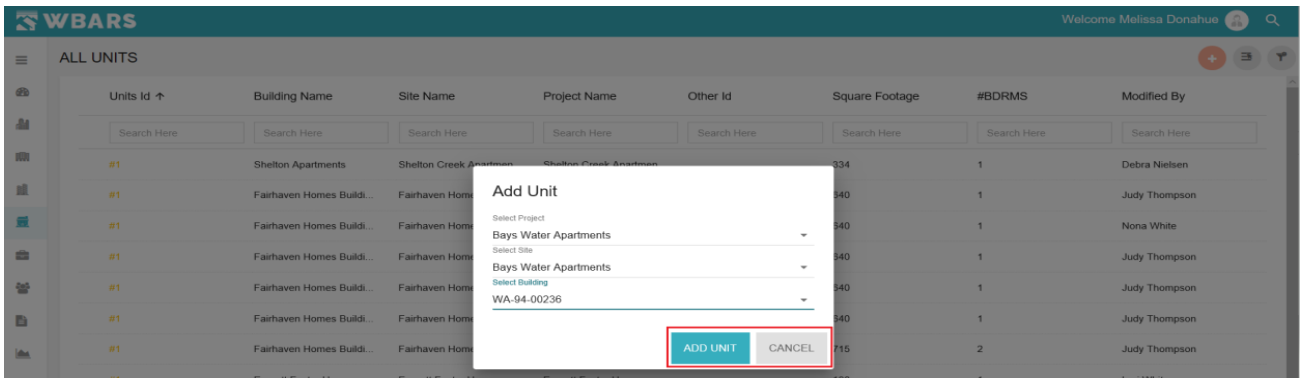
U4.3 Select Building

Select Building

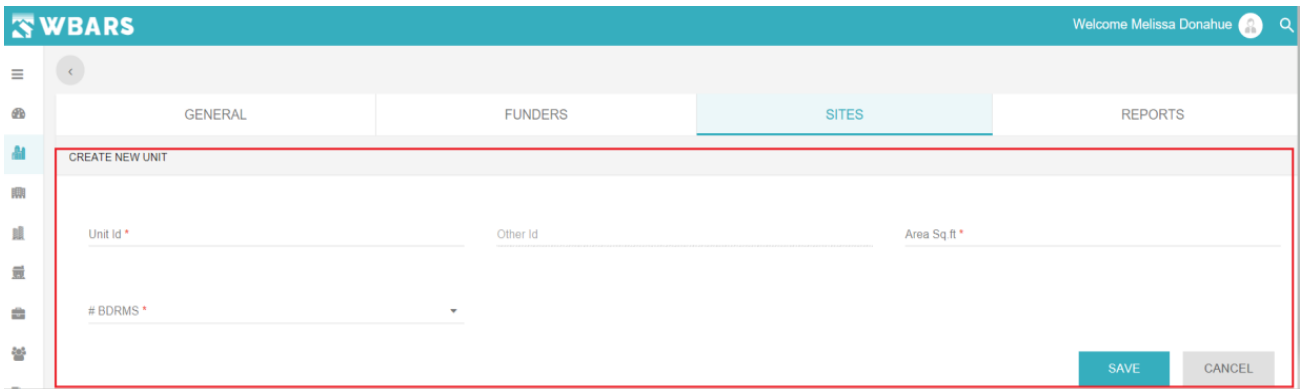
Click on **"Select Building"** where the building related the selected **Project** and **Site** will be shown. As per our example the selected Project and Site is **"Bays Water Apartments"** and its related buildings will be shown where you choose the building for which the unit will be created.



Step 3 – Once choosing the Project, Site and Building click on **"ADD UNIT"** to create / add a new unit or click on **"CANCEL"** to exit the process.



If clicked on **“ADD UNIT”** the page to create the new unit will be shown as in the image below,



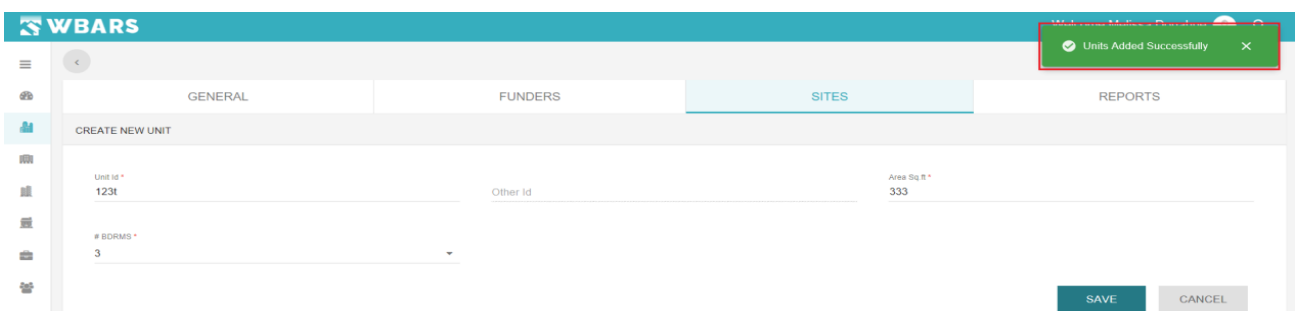
Step 4 – As a funder you will enter the following fields to create a new unit and these three fields below are mandatory fields where you can’t create a unit without entering the following fields,

- Unit Id
- Area Sq. ft
- #BDRMS


And the Property managers / Organization Admins will manually enter **“Other Id”** designations for each unit.

Step 5 – Click on **“SAVE”** to create a new unit or click on **“CANCEL”**

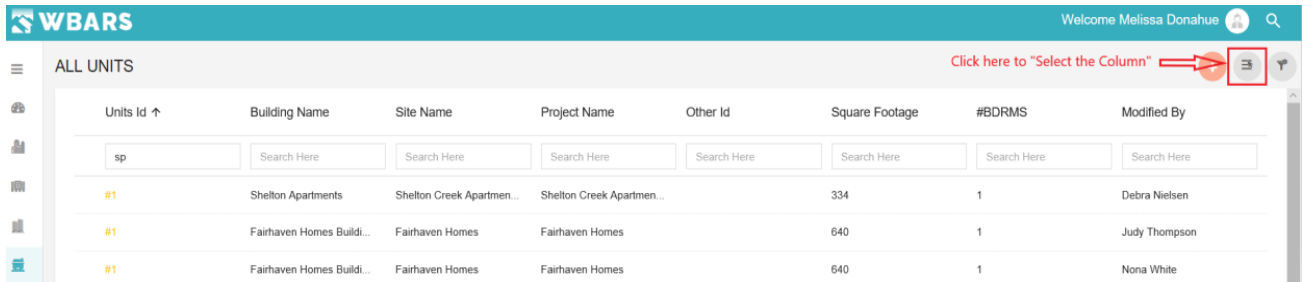
Once clicked on **“SAVE”** after providing the above details you will shown a success notification **“Units Added Successfully”** as shown in the image below,



U5. Select the Column

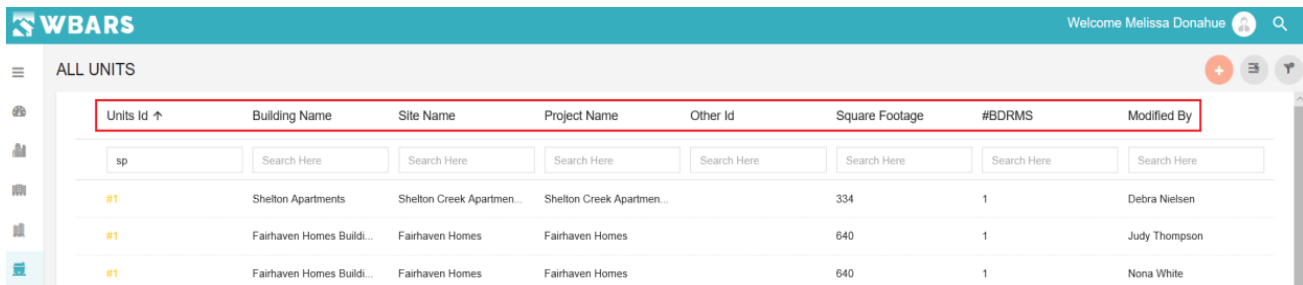
The columns shown in the “ALL UNITS” page can be customized by clicking “Select the Column” icon . The access to select the column is same for **Funders** and **Contractors / Managers** where any users can select the required columns.

This icon is placed at the top right corner and the below image shows the icon location,



U5.1 How does Select the columns work?

There are several columns shown in the below image and the user can customize the columns based on their needs where only the selected columns will be shown,

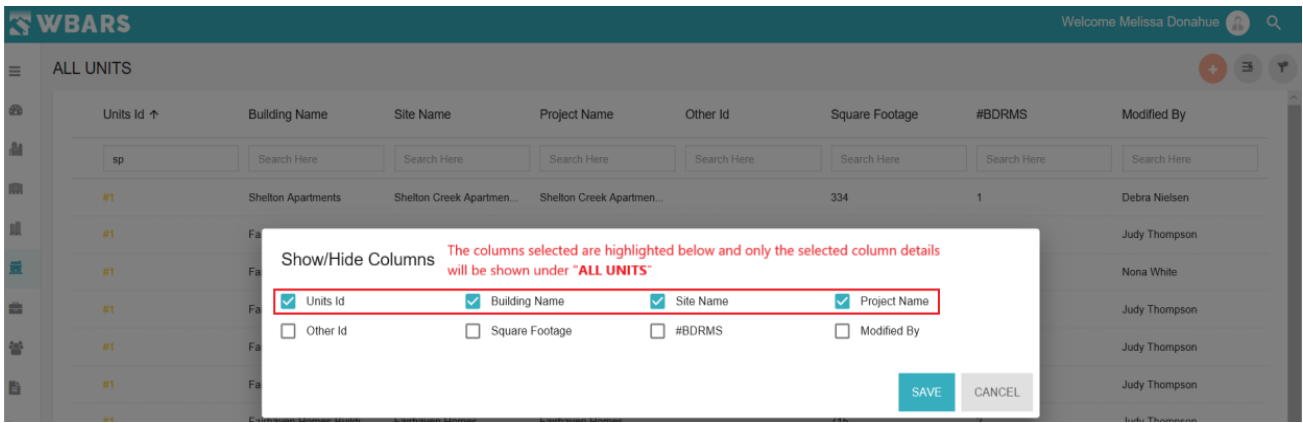


Let’s see the step by step process on how “Select the Column” works,

Step 1 – Click on “Select the columns” 

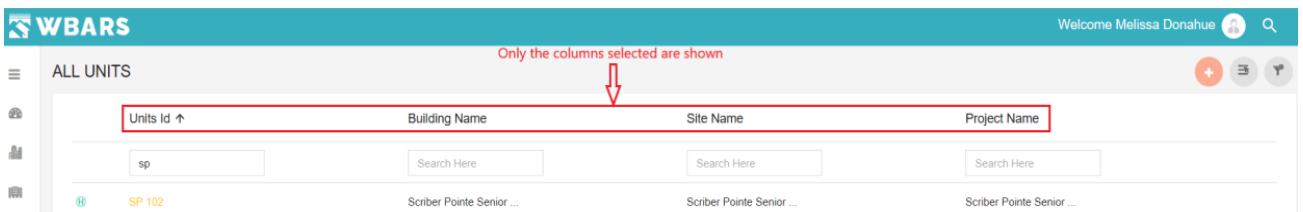
Step 2 – “Show/Hide Columns” will be shown to select the columns where you can click on the checkbox to select the required columns. (Select / Unselect)

For Example – Units Id, Building Name, Site Name and Project Name are the columns selected. The screenshot below shows the selected fields.




Step 3 – After selecting the required column fields click on **“SAVE”** or if you need to exit the process click on **“CANCEL”**.

Once you click on **“SAVE”** the selected columns fields will be shown under **“ALL UNITS”**. In the below screenshot you can see only the columns selected will be shown,




U6. Clear Filter

“Clear Filter” performs a common task for all users where clicking on the clear filter icon  clears the **“Search Here”** field (i.e. the set filter criteria will be cleared and restored to default). In case if you have type searched for any required details in the search field you can delete the typed input manually or just click on **“Clear Filter”** where all the search fields will be cleared.

U7. How to Sort the Unit List?



Each column can be sorted in ascending or descending order by clicking on the **“Column Title”**. once you click on the column name you can  see one these icons next to the column name which denotes the sorting.

Please see the below images for better understanding on how the sort option works.

Image 1 – The below image shows the list view by default before sorting. You can see “#1” which is on top of the list

Units Id	Building Name	Site Name	Project Name	Other Id	Square Footage	#BDRMS	Modified By
#1	Shelton Apartments	Shelton Creek Apartmen...	Shelton Creek Apartmen...		334	1	Debra Nielsen
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Judy Thompson
#1	Fairhaven Homes Buildi...	Fairhaven Homes	Fairhaven Homes		640	1	Nona White


Image 2 – Click on the column Title For example – Click on “Units Id” and the sorting is changed. In the previous image it showed “#1” and now its showing “ZJ3068” where the sorting placed the last Unit Id name on top.

Units Id	Building Name	Site Name	Project Name	Other Id	Square Footage	#BDRMS	Modified By
ZJ3068	Row or Townhouse (Mult...	Rainier Vista Northeas...	Rainier Vista Northeas...		1628	5	Jennifer Westerman
ZJ3066	Row or Townhouse (Mult...	Rainier Vista Northeas...	Rainier Vista Northeas...		1202	3	Jennifer Westerman
ZJ3064	Row or Townhouse (Mult...	Rainier Vista Northeas...	Rainier Vista Northeas...		1612	4	Jennifer Westerman

The sorting can be done by clicking on any “Column Title” where the order of the listing will change accordingly.

Organizations

O1. How to View Organizations List?

To view the list of Organizations, you can click on this icon  placed under the menu bar and the page “ORGANIZATIONS” will be shown.

The “ORGANIZATIONS” page shows the organization list where the Funder will have the access to view all the organizations associated with the WBARS and the Contractors/Owners, Managers will have the access to view the organization to which they are associated with.

The screenshot of the Organizations page of the funder and the other hierarchy users is shown below where you can see the difference.

O1.1 Funder

Name ↑	Organization Type	Address	City	State	ZipCode	Phone Number	E-mail	Status
2721 Fourth Avenue, LP	Owner	31642 South Coast High...	South Laguna	California	92677			<input checked="" type="checkbox"/>
A Regional Coalition f...	Read Only Organization	ARCH 16225 NE 87th St...	Redmond	Washington	98052			<input checked="" type="checkbox"/>
A.F. Evans Company, In...	Owner	1000 Broadway, Suite 3...	Oakland	California	94607			<input checked="" type="checkbox"/>
AA Bookkeeping & Accou...	Property Manager	PO BOX 8077	Lacey, WA	Washington	98509	360-459-1348	erobello@aol.com	<input type="checkbox"/>
Abie Label & Associate...	Property Manager	4210 198th ST SW SUITE...	Lynnwood	Washington	98036	206-382-8388	Tomkemp@gmail.com	<input checked="" type="checkbox"/>
Abused Deaf Women's Ad...	Owner, Property Manage...	8623 Roosevelt Way NE	Seattle	Washington	98115	206-922-7088	adwas@adwas.org	<input checked="" type="checkbox"/>
Accessible Space, Inc.	Property Manager, Owne...	2550 University Avenue...	Saint Paul	Minnesota	55114	(651) 645-7271 or 1-...	djacobson@accessiblesp...	<input checked="" type="checkbox"/>
ACRS	Property Manager	720 - 8th Ave S. #200	Seattle	Washington	98104	206-695-7600	josepha@acrs.org	<input checked="" type="checkbox"/>
Ad-West Realty Service...	Property Manager	545 Rainier Blvd N, Su...	Issaquah	Washington	98027-2806	4253913937		<input checked="" type="checkbox"/>
Administrator	Property Manager	112 - 23rd Avenue S.	Seattle	Washington	Zip:	(206) 219-5959	lfrench@cannonhouse.or...	<input checked="" type="checkbox"/>
Admiral House Housing ...	Owner, Property Manage...	1217 Sixth Avenue	Seattle	Washington	98101	(206) 622-4865 ext.27		<input checked="" type="checkbox"/>

Displaying 1 to 11 of 811 records

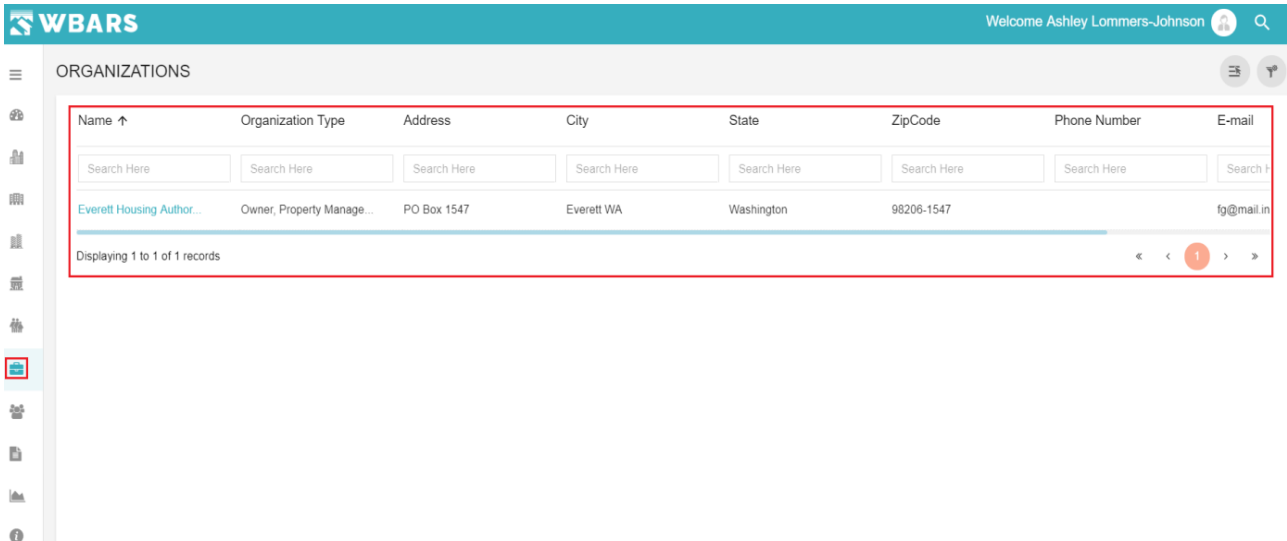
Funder can view all the Organization in the WABRS

As a Funder, you can view the list of all organization the WBARS but the read only funders will have the access to view the list of associated organizations only.

The Organizations page will show you the following details as shown in the table below,

1. Name (Organization Name)	2. Organization Type	3. Address
4. City	5. State	6. Zipcode
7. Phone Number	8. Email	9. Status
10. Actions		

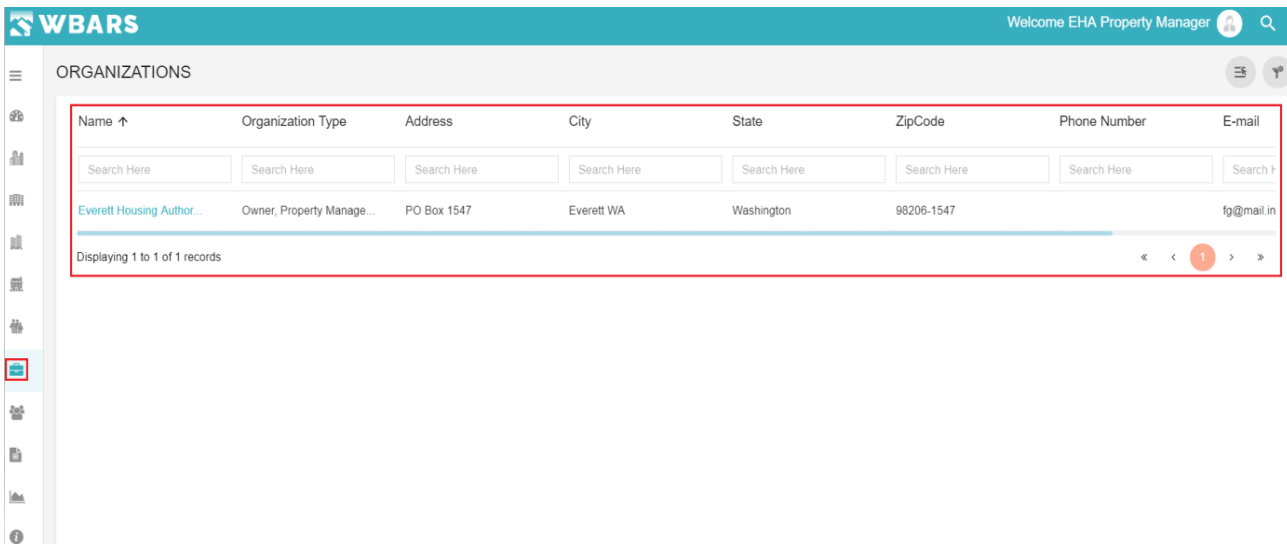
O1.2 Contractor / Owner



As a Contractor / Owner You can view the organization with which you are associated with. The Organizations page will show you the following details as shown in the table below,

1. Name (Organization Name)	2. Organization Type	3. Address
4. City	5. State	6. Zip Code
7. Phone Number	8. Email	9. Status

O1.3 Managers

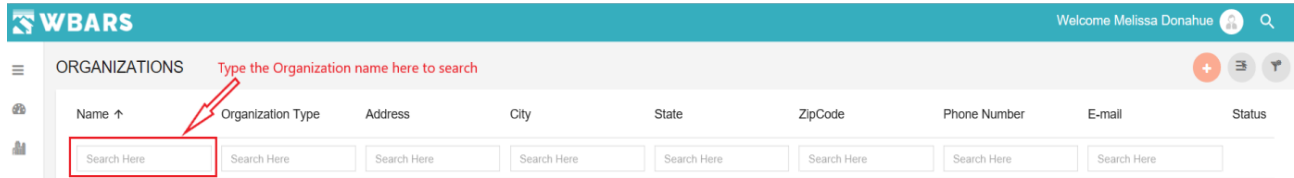


As a Manager You can view the organization with you are associated with. The Organizations page will show you the following details as shown in the table below,

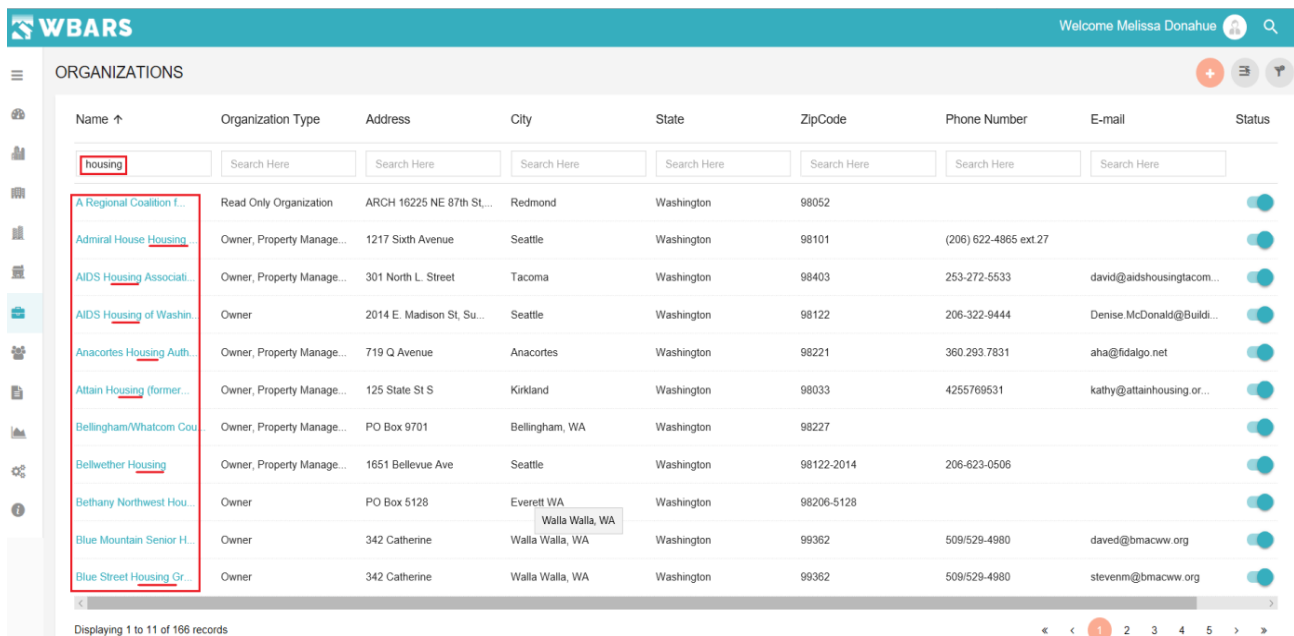
1. Name (Organization Name)	2. Organization Type	3. Address
4. City	5. State	6. Zip Code
7. Phone Number	8. Email	9. Status

02. How to search for an Organization?

The organization can be searched by any part of its name. You can type the organization name in the search field (**Search Here**) which is placed under the column title. The below image shows the area where you can type and search the for the organization.



For Example – If **“Housing”** is typed in the search field the Organizations name having housing in any part of its name will be the listing result as shown in the image below,



03. How to view an Organization Detail?

Each organization name under the column **“Name”** is a link where you can click on the organization name to view its details.

For Example – **“ACRS”** is the organization name then you will just click on the name and the details page of that organization name will be shown.

ORGANIZATIONS Click on the name of the organization to view the details of that organization

Name ↑	Organization Type	Address	City	State	ZipCode	Phone Number	E-mail	Status
2721 Fourth Avenue, LP	Owner	31642 South Coast High...	South Laguna	California	92677			<input checked="" type="checkbox"/>
A Regional Coalition f...	Read Only Organization	ARCH 16225 NE 87th St...	Redmond	Washington	98052			<input checked="" type="checkbox"/>
A.F. Evans Company, In...	Owner	1000 Broadway, Suite 3...	Oakland	California	94607			<input checked="" type="checkbox"/>
AA Bookkeeping & Accou...	Property Manager	PO BOX 8077	Lacey, WA	Washington	98509	360-459-1348	erobello@aol.com	<input type="checkbox"/>
Abie Label & Associate...	Property Manager	4210 198th ST SW SUITE...	Lynnwood	Washington	98036	206-382-8388	Tomkemp@gmail.com	<input checked="" type="checkbox"/>
Abused Deaf Women's Ad...	Owner, Property Manage...	8623 Roosevelt Way NE	Seattle	Washington	98115	206-922-7088	adwas@adwas.org	<input checked="" type="checkbox"/>
Accessible Space, Inc.	Property Manager, Owne...	2550 University Avenue...	Saint Paul	Minnesota	55114	(651) 645-7271 or 1-...	djacobson@accessiblesp...	<input checked="" type="checkbox"/>
ACRS	Property Manager	720 - 8th Ave S. #200	Seattle	Washington	98104	206-695-7600	josepha@acrs.org	<input checked="" type="checkbox"/>

03.1 Organization Details Page

ACRS

GENERAL CONTACTS

Organization Name *
ACRS

Organization Type *
Property Manager

Phone *
206-695-7600

Email Id
josepha@acrs.org

Address
720 - 8th Ave S. #200

City
Seattle

State
WA

Zip Code
98104

Org Status
Active

SAVE CANCEL

The Organization details page has two section,

- General
- Contacts

03.1.1 General

ACRS

GENERAL CONTACTS

Organization Name *
ACRS

Organization Type *
Property Manager

Phone *
206-695-7600

Email Id
josepha@acrs.org

Address
720 - 8th Ave S. #200

City
Seattle

State
WA

Zip Code
98104

Org Status
Active

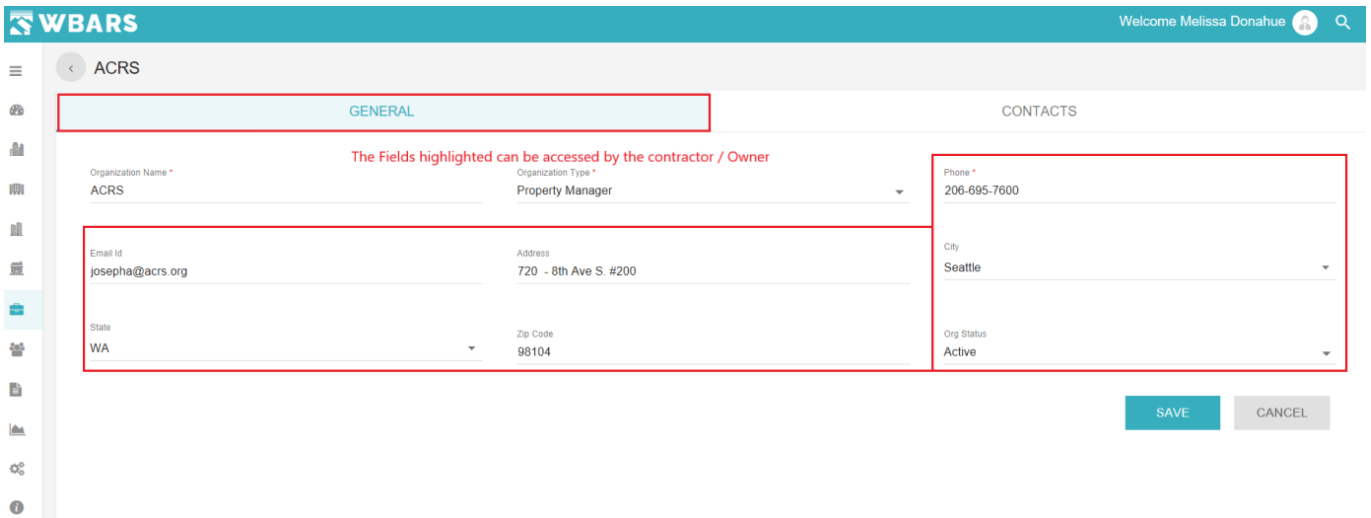
SAVE CANCEL

The general section of the organization details page shows the following details,

- Organization Name
- Organization Type
- Phone
- Email ID
- Address
- City
- State
- Zip Code
- Org Status

The access to the Edit / Change the fields in the general section varies where the **Funder** will have the access to all the above-mentioned fields under the general section, but the Contractor / Owner and Manager have no access to all fields where their access rights are explained below,

Contractor / Owner



The screenshot shows the 'GENERAL' tab of the organization details page for 'ACRS'. A red box highlights the following fields: Organization Name (ACRS), Organization Type (Property Manager), Email Id (josepha@acrs.org), Address (720 - 8th Ave S. #200), State (WA), Zip Code (98104), Phone (206-695-7600), City (Seattle), and Org Status (Active). A red text overlay reads: 'The Fields highlighted can be accessed by the contractor / Owner'. At the bottom right are 'SAVE' and 'CANCEL' buttons.

The fields highlighted in the above image can be changed by the

Managers

The Managers have no access to any fields under the general section

The Fields in the general section of the organization details page is explained below,

Organization Name

Funder

Organization Name *

As a Funder you can type the organization name here in this field. Just click on the field and type the organization Name.

This is a mandatory field and you can't save changes with this field empty. If you click on save with this field empty a warning message will be as in the image below.

Field will be validated when the user enters existing name and the validation message will be **"This Organization name already exists. Please enter a unique name or edit the properties of the existing Organization."**

Organization Name *

this field is required

Organization Type

Below are the four different types of organization

Funder	}	WSHFC and Commerce Funders have the rights to create this type of organization. Single Selection
Read Only Funder		
Contractor/Owner	}	Any Funders can create this type of organization. Multiple Selection
Property Manager		

1. WSHFC and Commerce funder will have access to create a new Funder Organization and Read Only Funder Organization.
2. If the user selects either Funder or Read Only Funder, then it should not allow to select Contractor/Owner or Property Manager.
3. However, if the user selects Contractor/Owner then he will be able to select Property Manager as the organization as type.
4. If the user attempts to save the organization without selecting Type, then it should show a validation message like **"Please select the Organization Type"**

Funder

Organization Type *

As a Funder you can choose the organization type by clicking of the field you will provided with two option to choose. They are,

- Owner

- Property Manager

You can choose any one or both simultaneously (Multiple Selection) from the above options by clicking the checkbox and that will be set as the organization type which you are adding.

This is a mandatory field and you can't save changes with this field empty. If you click on save with this field empty a warning message will be as in the image below.



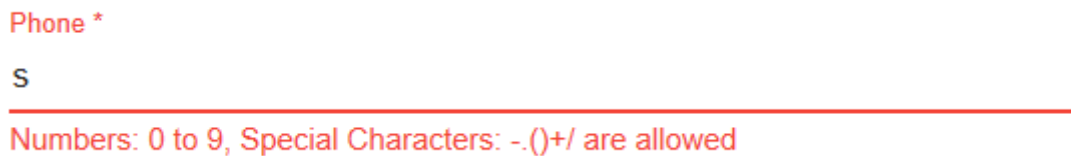
Owner

The Contractor / Owner will have the access to change the organization type of the managers.

Phone



As a Funder, Contractor / Owner you can enter the valid phone number here and you should give only numeric inputs. In case if you give alphabetic or other inputs a warning message will be shown as in the image below,



Email ID



As a Funder, Contractor / Owner you can edit / enter the valid email id here. If you enter any invalid email id you will be shown a warning message as in the image below,

Email Id

s&.com

email is not valid

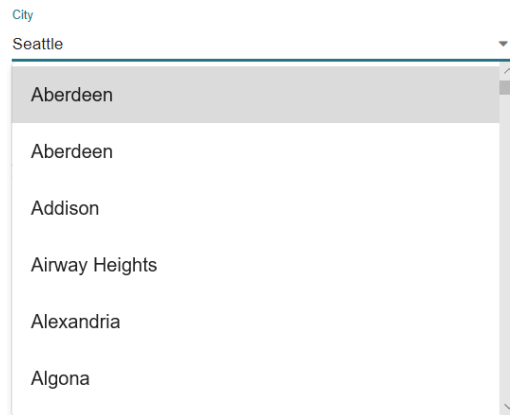
Address

Address

720 - 8th Ave S. #200

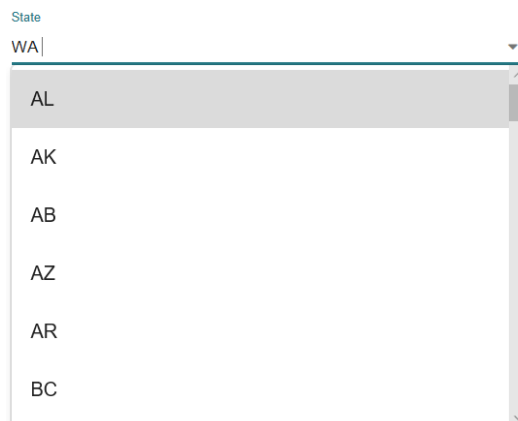
As a Funder, Contractor / Owner you can edit / enter the address in this field. This is a non-mandatory field and you can save the changes even if this field is empty.

City



As a Funder, Contractor / Owner you can click on the “City” field and choose your city from the dropdown list or you can type your city name where the relevant results will be shown in the dropdown once you start typing and you can choose the city from the dropdown.

State



As a Funder, Contractor / Owner you can click on the “State” field and choose your State from the dropdown list or you can type your state name where the relevant results will be shown in the dropdown once you start typing and you can choose the state from the dropdown.

Zip Code

Zip Code
98104

As a Funder, Contractor / Owner you can enter a valid Zip code.

Org Status

Org Status
Active

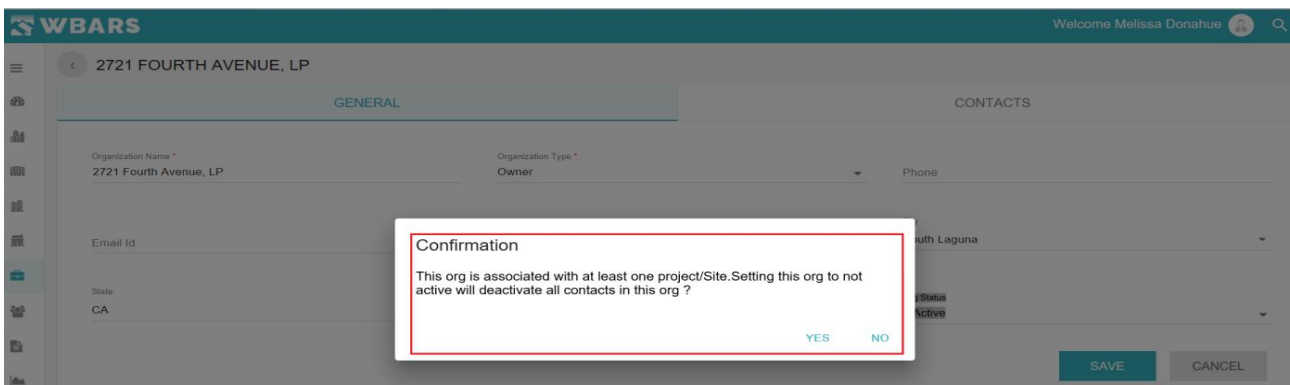
As a Funder, Contractor / Owner you can change the status of the organization where you will be provided with two options,

- Active
- Inactive where you can choose anyone

Active – The organization will be available to access and login

Inactive – The Organization will have no access to login WBARS, and the related contacts will be deactivated

If you change the status of the organization from active to inactive you will be shown with a validation message as in the image below,



You can click “YES” to make the organization inactive or click on “NO” to exit the process.

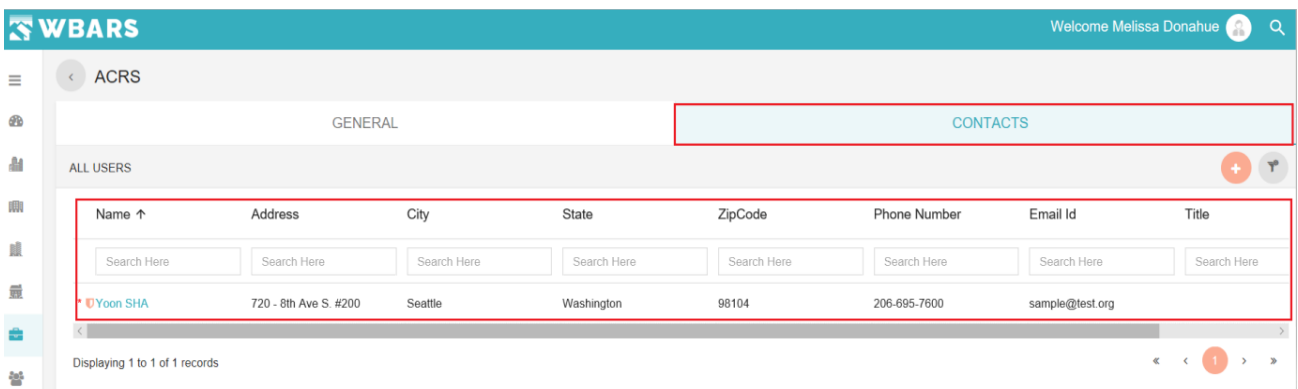
O4. Save / Cancel




You can save or cancel the changes. If you click on the “SAVE” button the changes made will be saved and if you wish not to proceed to save the changes you can click on “CANCEL” where the page will go back to the Organizations page.

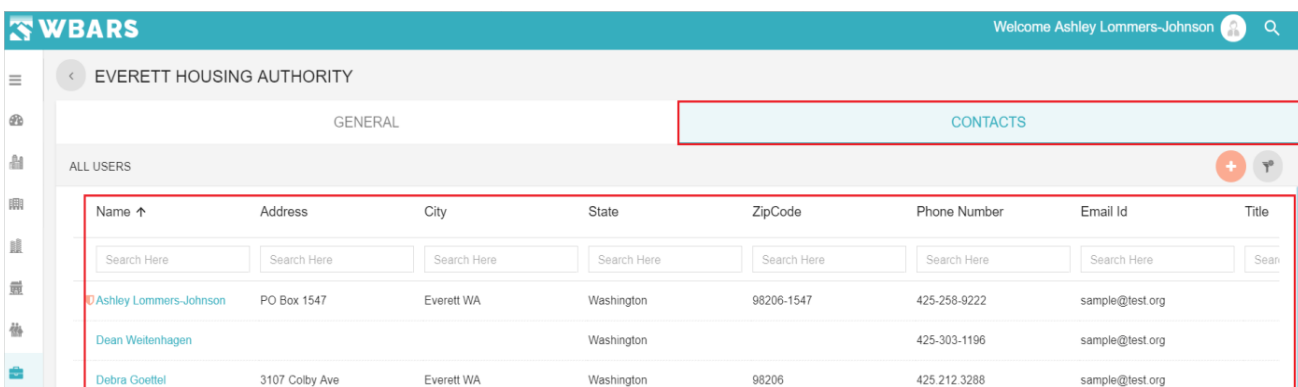
Contacts

Funder



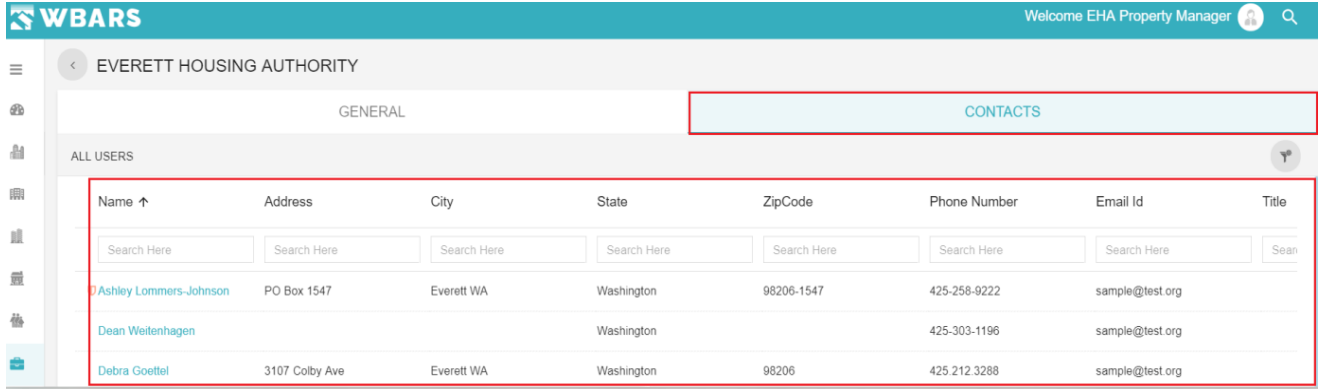
The “Contacts” section shows the list of all contacts associated with the organization and you will have the access to add new contacts to the organization by clicking the **Add** icon  and the page to enter the contact details will be shown and you can click on the contact name to view the contact details. As a funder you can view the contacts of any organization in the WBARS.

Owner



The “Contacts” section shows the list of all contacts associate with your organization and you will have the access to add new contacts to the organization by clicking the **Add** icon and the page to enter the contact details will be shown.

Manager




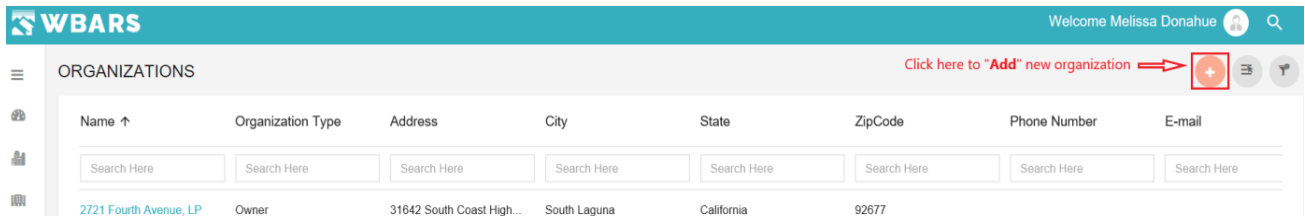
You can view the list of contacts associated with your organization and you can click on the contact name to view the contact details.

05. How to Add a New Organization?

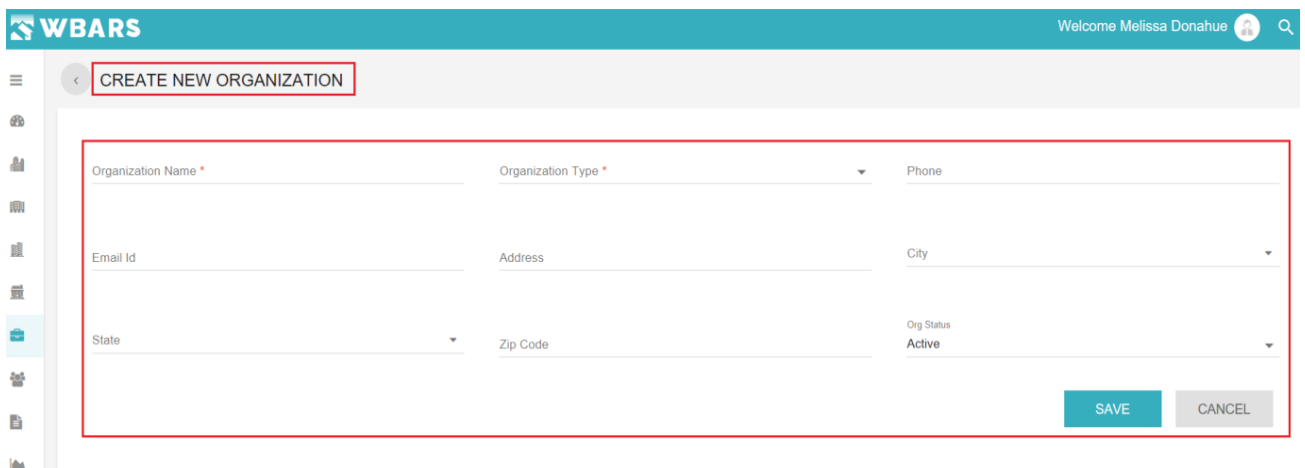
*“Only the **Funder** can add a new organization as the option to add a new organization will not be available for other users”*

Funder

To add a “New Organization” you will click on the “**Add**” icon  placed at the top right corner. The icon location is shown in the image below,




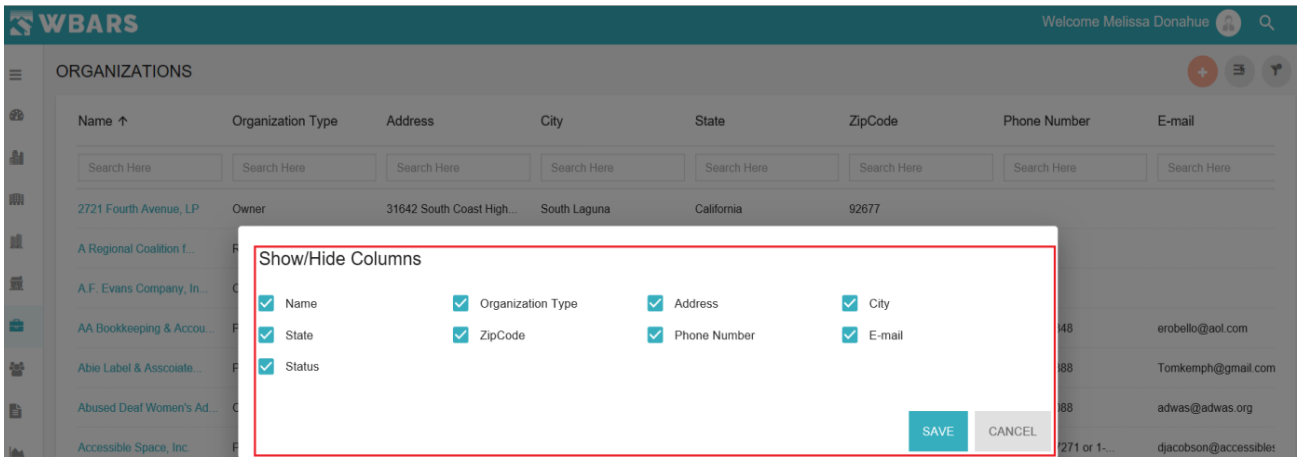
Once you click on the “**Add**” icon the “**CREATE NEW ORGANIZATION**” page to enter the details to create a new organization will be shown. The screenshot the page is shown below,



To create the new organization, you will enter the above fields where the field details and the field properties are explained in “My Profile” – “General” Section.


06. Select the Columns

To customize the columns shown under “” you can click on this icon  where the option to **Show / Hide Columns** will be shown as in the image below.





You can choose all or any required fields by Clicking on the Check box. You can Select / Unselect any field and click on “SAVE” to save all the changes done or “CANCEL” to unsave the changes.

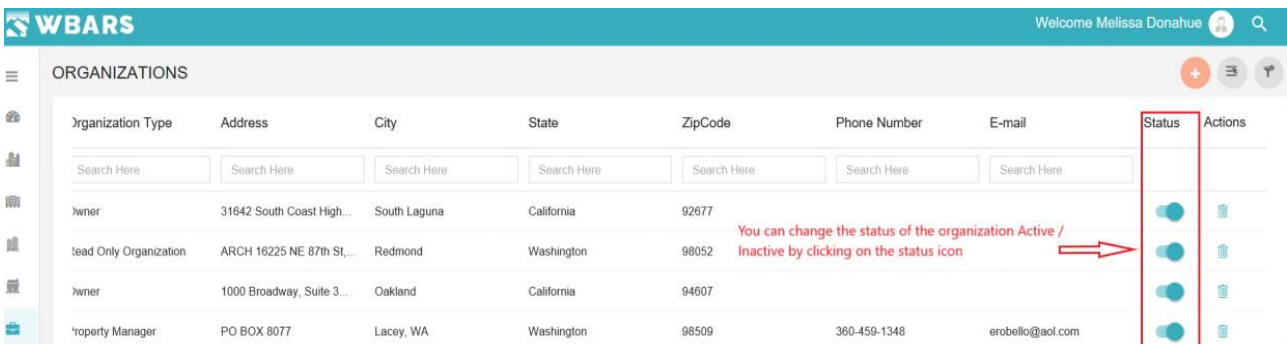
07. Clear Filter

“Clear Filter” performs a common task for all users where clicking on the clear filter icon  clears the “Search Field” ie. the set filter criteria will be cleared and restored to default.

08. Status

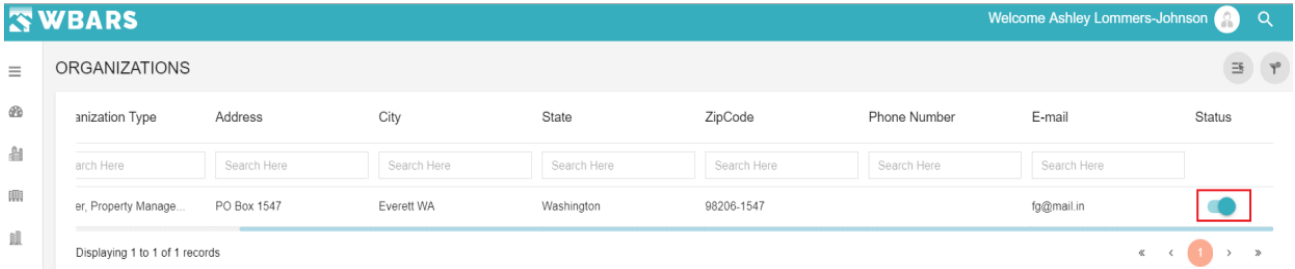
By Clicking on the status icon, you can change the organization status from  Active /  Inactive under the “ORGANIZATIONS” page itself.

Funder



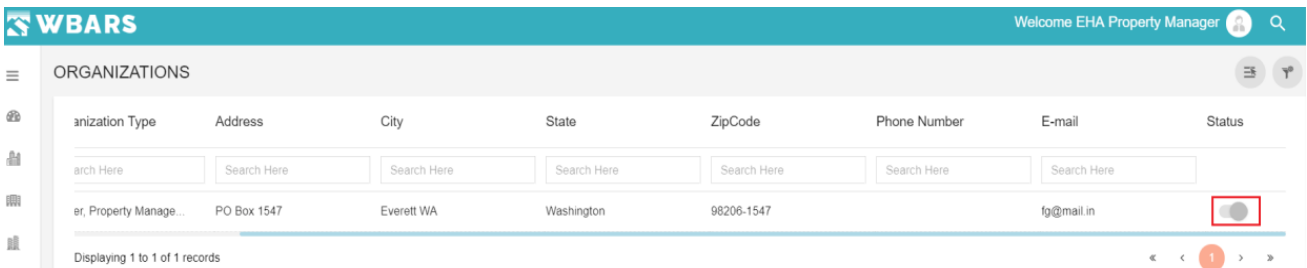
The Funder will have the access to change the status of the any organization.

Owner / Organization Admin



The Owner/Organization Admin can change the organization status with which they are associated.

Managers




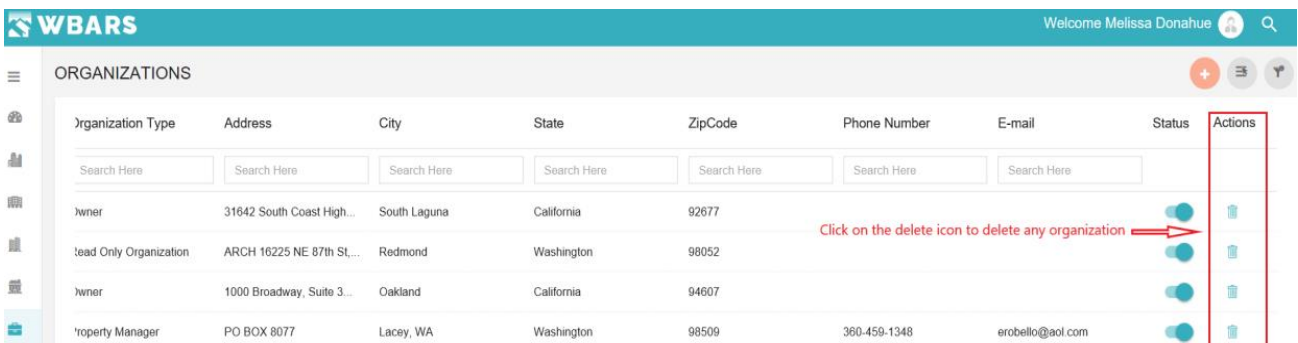
The manager can see the status of the organization but have no access to change it.

09. How to Delete an Organization?

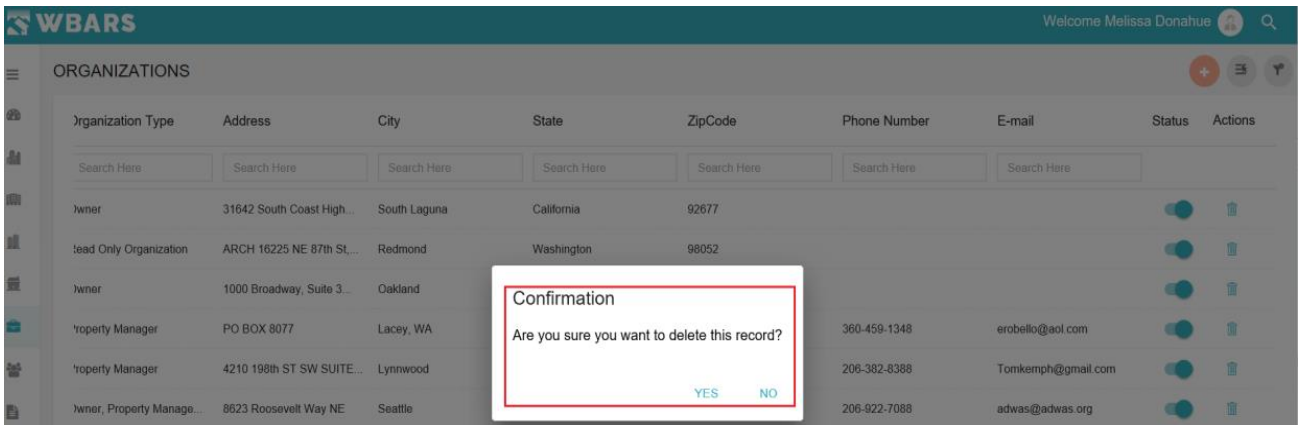
*“Only the **Funder** can add a delete the organization as the option to delete an organization will not be available for other users”*

Funder

To delete any organization, you can click on the **“Delete”** icon  where this icon is placed for each organization and you can find this icon under the **“Actions”** column. The below screenshot shows the location of the delete icon.

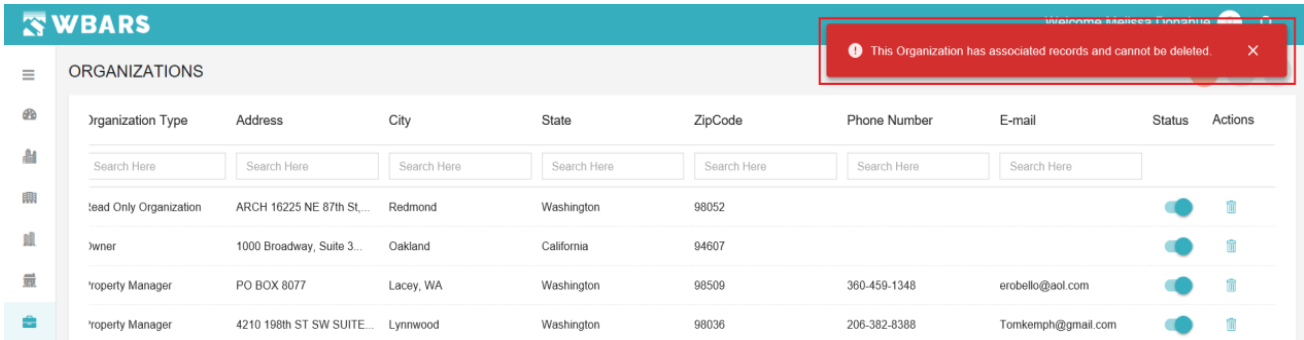


When you click on the **“Delete”** icon you will be shown with a warning message as shown in the image below,

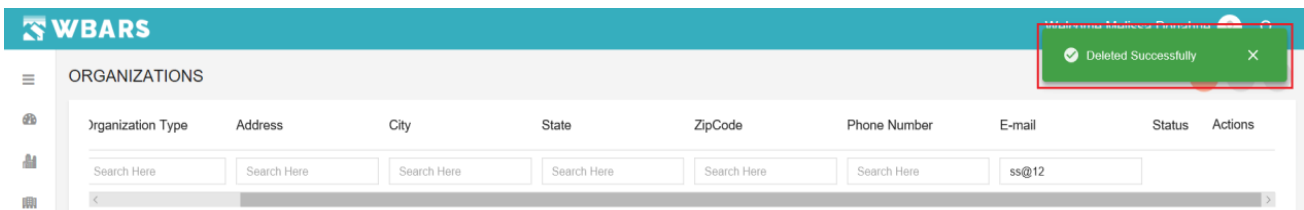


You can click “YES” to delete the organization or click on “NO” to exit the process.

In case the organization which you are planning to delete has associated records and you click on “YES” then you will be shown with warning validation message “This Organization has associated records and cannot be deleted.” As shown in the image below,



If the organization has no associated records then the it will get deleted once you click “YES” and show you the success notification as in the image below,




Occupants

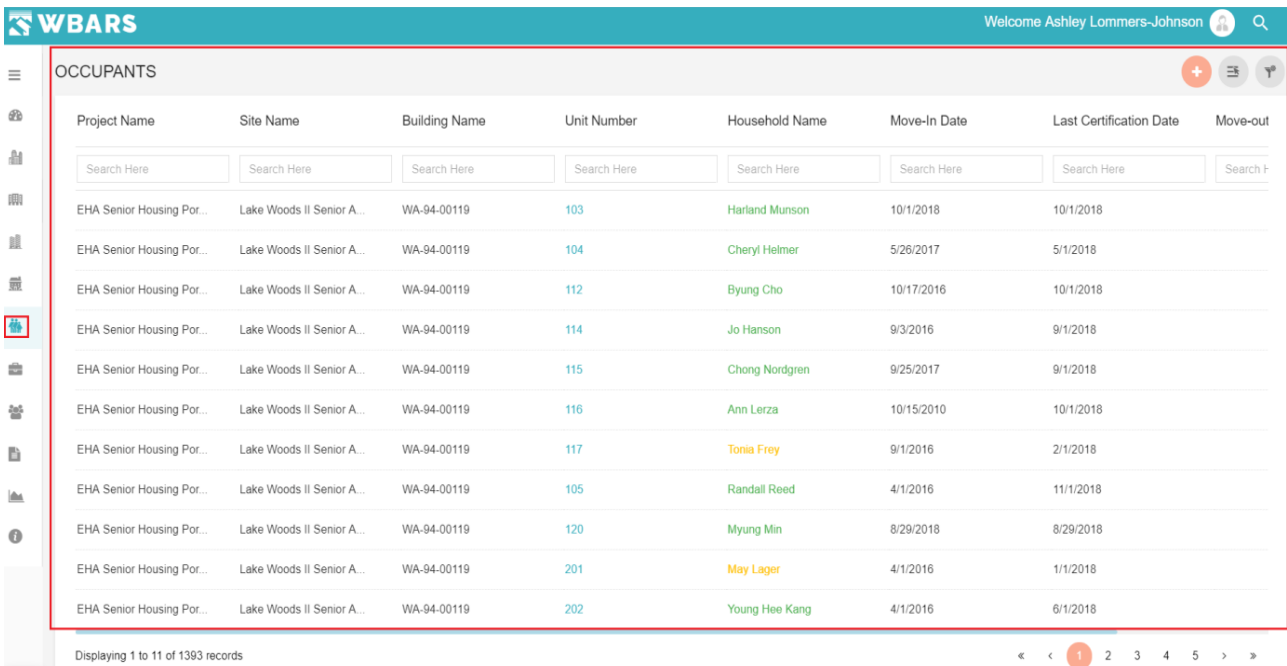
The Occupants page has the list of occupants associated with the projects of an organization.

O1. Who can access occupants?

The **Non-Funder** organization’s **OA / Owner and the Property Managers** has the access to view the occupants. The other users of the WBARS has no access to view and they will not have the option “Occupants” for their user login.

O2. How to view the Occupants List?

To view the occupants list you will click on the **“Occupants”** icon  under the menu and the page having the list of occupants associated with the projects will be shown as in the image below,



Project Name	Site Name	Building Name	Unit Number	Household Name	Move-In Date	Last Certification Date	Move-out
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	103	Harland Munson	10/1/2018	10/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	104	Cheryl Helmer	5/26/2017	5/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	112	Byung Cho	10/17/2016	10/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	114	Jo Hanson	9/3/2016	9/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	115	Chong Nordgren	9/25/2017	9/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	116	Ann Lerza	10/15/2010	10/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	117	Tonia Frey	9/1/2016	2/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	105	Randall Reed	4/1/2016	11/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	120	Myung Min	8/29/2018	8/29/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	201	May Lager	4/1/2016	1/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	202	Young Hee Kang	4/1/2016	6/1/2018	

Displaying 1 to 11 of 1393 records

O3. How to Search Occupant?

You can search an occupant by having the occupant’s **“Household Name”**. If you are looking for the details of a specific occupant, then you can type search their name in the search field under the column Title **“Household Name”**. The search field to type search is highlighted in the image below.

WBARS Welcome Ashley Lommers-Johnson

Type search the household here and the results will be shown based on the given input

Project Name	Site Name	Building Name	Unit Number	Household Name	Move-In Date	Last Certification Date	Move-out
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	103	Harland Munson	10/1/2018	10/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	104	Cheryl Helmer	5/26/2017	5/1/2018	

04. How to view the occupant Details?

To view the occupant details you can click on the “Household Name” each name under this column is placed as a link where once you click on the name you will see it details. The screenshot below shows the location of the name which you can click on,

WBARS Welcome Ashley Lommers-Johnson

Click on the name to view its details. All the names are a link which will open once clicked on it

Project Name	Site Name	Building Name	Unit Number	Household Name	Move-In Date	Last Certification Date	Move-out
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	103	Harland Munson	10/1/2018	10/1/2018	
EHA Senior Housing Por...	Lake Woods II Senior A...	WA-94-00119	104	Cheryl Helmer	5/26/2017	5/1/2018	

Once you click on the name of the household the occupant details page will be shown.

For Example – In the above image you can see the household name “Harland Munson” where you can click on I where the details page will be shown as in the image below,

WBARS Welcome EHA Property Manager

HARLAND MUNSON - OCCUPANTS DETAILS

GENERAL	HOUSEHOLD MEMBER INFO	HOUSEHOLD MEMBER INCOME	SET-ASIDE AND RENT DATA
Project Name EHA Senior Housing Portfolio	Site Name Lake Woods II Senior Apartments	Building Name WA-94-00119	
Unit Number 103	Number of Bedrooms 1	Square Footage 590	
Unit Designation * Restricted			
<input checked="" type="checkbox"/> This is a HOME Program Unit <input type="checkbox"/> This is a NHTF Program Unit			
<input type="checkbox"/> Was this Household living in the Unit before the Unit become a HOME Assisted Unit ?			
HOME Unit Occupancy Renter		HOME Category HOME Program - County	
HOME Household Name * Harland Munson		HOME Head of household race White	<input type="checkbox"/> HOME Head of House Ethnicity - Hispanic or Latino

Occupants Details

The screenshot of the “**Occupant Details**” page is shown above. The page has the following sections,

- General
- Household Member Info
- Household Member Income
- Set - Aside and Rent Data

Note – The fields area accessible only by the users at the specified levels

04.1 General

The General section of the occupant details has the following information’s,

1. Project Name	2. Site Name	3. Building Name
4. Unit Number	5. Number of Bedrooms	6. Square Footage
7. Unit Designation	8. Home Unit Occupancy	9. Home Category
10. Home Household Name	11. Home Head of Household Race	12. Move-in Date
13. 2019 Certification Date	14. 2018 Certification Date	15. Move-Out Date
16. Home Type of Household	17. Tax Credits Special Needs	18. Move-in Household Size
19. Household Size		

04.2 Household Member Info

First Name	Last Name	Middle Initial	Relationship to HOH	Date of Birth	FT Student?	SSN-Last 4	Race	Ethnicity	Disabled
Harland	Munson	C	H - Head of Household	02/25/1935	2 - No	8812	White	2 - Not Hispanic or Latino	2 - No
Alice	Munson	C	S - Spouse	04/08/1938	2 - No	9586	White	2 - Not Hispanic or Latino	2 - No

Household Student Exception

The “Household Member Info” section shows you the information of the household members in the table format where you can see the following information’s of the household member,

1. First Name	2. Last Name	3. Middle Initial
4. Relationship to HOH	5. Date of Birth	6. FT Student?
7. SSN – Last4	8. Race	9. Ethnicity
10. Disabled		

04.3 Household Member Income

First Name	Last Name	(A) Employment or Wages	(B) SOC Sec/Pensions	Public Assistance	Other Income
Harland	Munson	\$0.00	\$17,408.00	\$0.00	\$0.00
Alice	Munson	\$0.00	\$15,787.00	\$0.00	\$0.00
		\$0.00	\$33,195.00	\$0.00	\$0.00
					Total Income: \$33,195.00

HH Mbr	(F) Type of Assests	(G) Current or Imputed	(H) Cash Value	(I) Annual Asset Income	Other Asset Type Description
Harland Munson	Checking	C	\$1,200.00	\$0.00	N/A
Totals:			\$1,200.00	\$0.00	

(0 X 2%) = Imputed Income: \$0.00
 (Greater of Imputed Income or Annual Asset Income) = Total Income From Assets: \$0.00
 Total Annual Household Income - All Sources: \$33,195.00

The income information of the household members is shown in this section and it has the following fields,

1. First Name	2. Last Name	3. (A) Employment or Wages
4. (B) SOC Sec / Pensions	5. Public Assistance	6. Other Income
7. HH Mbr	8. (F) Type of Assets	9. (G) Current or Imputed
10. (H) Cash Value	11. (I) Annual Asset Income	12. Other Asset Type Description


O4.4 Set Aside and Rent Data

The final section of the of the occupant details is Set Aside and Rent Data. This section has the following fields,

1. Move in Restricted Unit Percentage	2. Restricted Unit Percentage	3. Previous Restricted Unit Percentage
4. Move-in Annual Gross Income	5. Move-in Maximum Allowance Income	6. Current Monthly Gross Income
7. Current Annual Gross Income	8. Current Maximum Allowable income	9. Actual % of Median Area Income
10. Resident Payment	11. Utility Allowance	12. Utility Allowance Source
13. Total Resident Payment	14. Minimum Allowed Rent	15. Maximum Allowed Home Rent

16. Total Subsidy Amount	17. Primary Rent Subsidy Type	18. Comment
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05. How to Move in a new occupant?

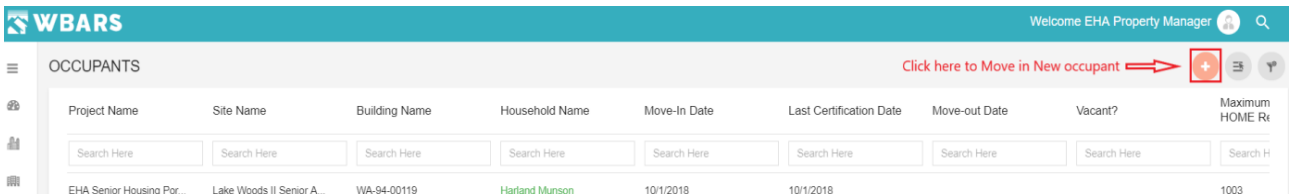
To **“Move in”** a new occupant you can click on this **“Move-In”** button  which is placed at the top right corner. A new household can be accommodated by clicking **“Move-In”** button where the Associated Onsite managers

05.1 User Rights to Move In

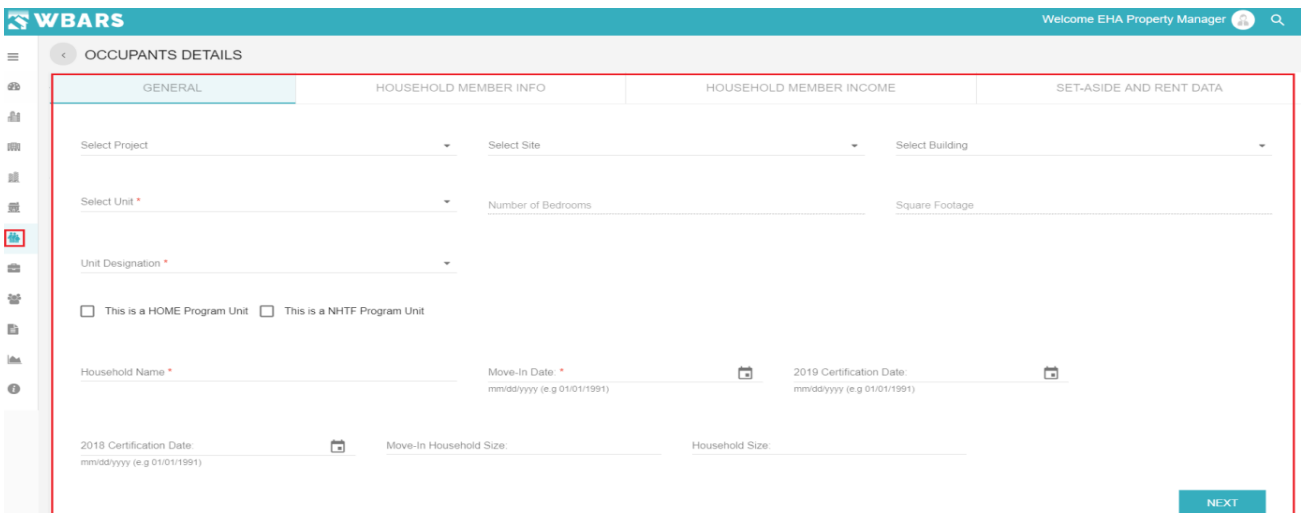
- a) Associated Onsite Manager (OM) has the rights to Move In a new household unit.
- b) Properties doesn't have OM then Property Manager (PM) will get the rights to Move-In.
- c) Once the report submitted to PM level then also PM will get access to Move-In.

**Household name has <empty> or <vacant> will directs to Occupant Move In page. Please note there should be an empty units or vacant units available in the site to move in a new household.*

The location of the **“Move in”** button is shown in the image below,



Once you click on **“Move in”** icon the page to enter the occupant's detail will be shown as in the image below,



You will enter all the required details of the occupant and there are four sections which was shown earlier in the [Occupant Details](#). Let's see the detailed explanation of the fields in the occupant details,

FYI

- **Household Member info and Household Member income is applicable only for WSHFC**

So, after you provide the **general** information and click next you will be directly moved to **Set Aside and Rent Data** if you are a **non WSHFC** user.

05.1 General

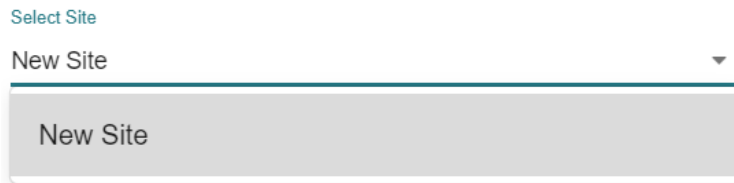
The General section of the occupant details has the following fields which you need to provide.

1. Select Project	2. Select Site	3. Select Building
4. Select Unit	5. Number of Bedrooms	6. Square Footage
7. Unit Designation	8. This is a Home Program unit	9. This is a NHTF Program Unit
10. Household Name	11. Move-in Date	12. 2019 Certification Date
13. 2018 Certification Date	14. Move-in Household Size	15. Household Size

G1. Select Project

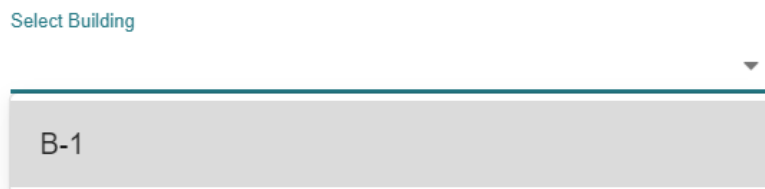
Click on this field and select the project name or you can type the name of the project where the result will be shown in the dropdown from where you can choose one. If the entered input doesn't match the system records, you will be shown **"No Options"**. The projects associated only with your organization will be shown.

G2. Select Site



Select site will show you the options to choose only if the project is selected. Click on this field and select the site name or you can type the name of the site where the result will be shown in the dropdown from where you can choose one. If the entered input doesn't match the system records, you will be shown **"No Options"**. The sites related to the project that you have chosen will be shown here.

G3. Select Building

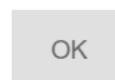


The building associated with the site chosen will be shown here to choose. Click on this field and select the building or you can type the name of the building where the result will be shown in the dropdown from where you can choose one. If the entered input doesn't match the system records, you will be shown **"No Options"**. The buildings related to the site that you have chosen will be shown here.

If there are no empty units available you will be shown with the following message as shown in the image below,

Message:

There are no empty units available for move-in.



G4. Select Unit

Select Unit *

3|

3

The units related to the building will be shown in the drop down where you can choose the units. If the units have no utility allowances added then you will be shown with a warning message as shown in the image below,

Select Unit *

24|

No Utility Allowances found for this Bedroom.

G5. Number of Bedrooms

Number of Bedrooms

3

Once you choose the unit this field gets auto filled having the number of bedrooms which the selected unit has. If these numbers are incorrect, contact your funder immediately.

G6. Square Footage

Square Footage

1299

Once you choose the unit this field gets auto filled having the Square Footage which the selected unit has. If these numbers are incorrect, contact your funder immediately.

G7. Unit Designation

Unit Designation *

CAU-Maintenance

CAU-Manager

CAU-Security

Market Rate

Restricted

The Unit Designation is a dropdown field where you will click on the field and choose the required option from the dropdown where you have the restricted and Non-Restricted Unit designation and it is mandatory to choose.

G7.1 Restricted

IF the unit designation is chosen as “**Restricted**” then the mandatory fields change as shown in the image below,

Unit Designation *
Restricted |

This is a HOME Program Unit This is a NHTF Program Unit

Household Name * Move-In Date: * 2019 Certification Date: *
mm/dd/yyyy (e.g 01/01/1991) mm/dd/yyyy (e.g 01/01/1991)

2018 Certification Date: * Move-In Household Size: * Household Size: *
mm/dd/yyyy (e.g 01/01/1991)

And the set aside and rent data will have the mandatory fields.

G7.2 Non-Restricted

The Non restricted units are

- CAU Maintenance
- CAU Manager
- CAU Security
- Market Rate

If any of the above is chosen as the unit designation then the mandatory fields changes as shown in the image below,

Unit Designation *
CAU-Manager |

This is a HOME Program Unit This is a NHTF Program Unit

Household Name * Move-In Date: * 2019 Certification Date: *
mm/dd/yyyy (e.g 01/01/1991) mm/dd/yyyy (e.g 01/01/1991)

2018 Certification Date: * Move-In Household Size: * Household Size: *
mm/dd/yyyy (e.g 01/01/1991)

And the set aside and rent data will have no mandatory fields.

G8. Unit Type

There are two-unit types which can be either **HOME Program** or **NHTF program**. Fields like Unit Occupancy, Head of Household Race, Category Type of Household is related to the type selection. (Please note that the Category field is not applicable for NHTF unit type)

IF **Home Program** Unit you will be shown with the question as in the image below and click the check box if the unit type is a home program unit and the following information's should be provided

This is a HOME Program Unit This is a NHTF Program Unit

Was this Household living in the Unit before the Unit become a HOME Assisted Unit ?

HOME Unit Occupancy	▼	HOME Category	▼
HOME Household Name *		HOME Head of household race	▼
		<input type="checkbox"/> HOME Head of House Ethnicity - Hispanic or Latino	
Move-In Date: *	📅	2019 Certification Date:	📅
mm/dd/yyyy (e.g 01/01/1991)		mm/dd/yyyy (e.g 01/01/1991)	
2018 Certification Date:	📅	HOME Type of Household	▼
mm/dd/yyyy (e.g 01/01/1991)			
Tax Credits Special-Needs	▼	Move-In Household Size:	Household Size:

NEXT

If **NHTF Program** unit you will be shown with the question as in the image below and click the check box if the unit type is a home program unit and the following information's should be provided

This is a HOME Program Unit This is a NHTF Program Unit




Was this Household living in the Unit before the Unit become a NHTF Assisted Unit ?

NHTF Unit Occupancy	▼	NHTF Household Name *	
NHTF Head of household race	▼	<input type="checkbox"/> NHTF Head of House Ethnicity - Hispanic or Latino	
		Move-In Date: *	📅
		mm/dd/yyyy (e.g 01/01/1991)	
2019 Certification Date:	📅	2018 Certification Date:	📅
mm/dd/yyyy (e.g 01/01/1991)		mm/dd/yyyy (e.g 01/01/1991)	
NHTF Type of Household	▼	Tax Credits Special-Needs	▼
Move-In Household Size:	Household Size:		

NEXT

If no unit type is chosen the you will be shown with the following as shown in the image below,

This is a HOME Program Unit This is a NHTF Program Unit

Household Name *	Move-In Date: * mm/dd/yyyy (e.g 01/01/1991)		2019 Certification Date: mm/dd/yyyy (e.g 01/01/1991)	
2018 Certification Date: mm/dd/yyyy (e.g 01/01/1991)		Tax Credits Special-Needs	Move-In Household Size:	Household Size:

NEXT

G9. Household Name

Household Name *

You will enter the household name here and this is a mandatory field.

G 10. Move-In Date

Move-In Date: *

mm/dd/yyyy (e.g 01/01/1991)




The move-in date field must be filled in for new move-ins. Please note: A household may not move into a unit the same day it was vacated.

When entering a move-in, the current year's certification field will be automatically populated with the Move-In Date.

2019 Certification Date:

05/11/2019

mm/dd/yyyy (e.g 01/01/1991)



When entering a recertification you will need to clear out the prior year's certification date from this field and enter the current year's recertification date. You will then need to enter the prior year's certification date in the previous certification field below (may need to first clear an older certification date). For each unit's activity, be sure to enter re-certifications, move-ins and move-outs in chronological order.

2018 Certification Date:

05/02/2018



mm/dd/yyyy (e.g 01/01/1991)

Every 12 months the property should be recertified then the old certification date will be noted as Previous Year Certification Date.


If the user enters the certification date year greater than the year being submitted, then it should show the below validation message

“Table 1 record has a Recent Certification Date that is in a year greater than the year being submitted”

It should show a validation message when editing a household unit which doesn't updated the current certification date

“The current certification date is more than a year old. It should be updated before submission”

G11. Tax Credits Special Needs

Tax Credits Special-Needs 

This field will be visible to the projects funding by WSHFC. Once you click on this field the following options will be shown,

- Disabled
- Large Household
- Farmworker
- Farmworker-Large Household
- Farmworker-Disabled
- Farmworker-Homeless
- Transitional
- Transitional-Disabled
- Transitional-Large Household
- Homeless
- Homeless-Disabled
- Homeless-Large Household

- Elderly

G12. Move-In Household Size

Move-In Household Size:

Move-In Household Size should not be changed after Move-In. The Household Size field should reflect the size as of the current certification.

Move Out

A household unit can be vacated from the building by entering a valid move out date.

When entering a Move Out Date with dates in previous or next report year then it should show a validation message

“Move Out Date must be in the current reporting year in 2018.”

G13. Household Size

Household Size:

This field always appears regardless of project type. This field must be filled in so that WBARS can properly calculate the income/rent limits for this household.

Click on **“Next”** once you have provided all the required details.

05.2 Household Member Info

GENERAL	HOUSEHOLD MEMBER INFO	HOUSEHOLD MEMBER INCOME	SET-ASIDE AND RENT DATA						
First Name	Last Name	Middle Initial	Relationship to HOH	Date of Birth	FT Student?	SSN-Last 4	Race	Ethnicity	Disabled
Mary	Hua	M	H - Head of Household	10/19/1927	2 - No	4870	American Indian or Alaska Native, and White	2 - Not Hispanic or Latino	2 - No
Household Student Exception									

The Household Member Info will have following fields,

1. First Name	2. Last Name	3. Middle Initial
4. Relationship to HOH	5. Date of Birth	6. FT Student?
7. SSN – Last4	8. Race	9. Ethnicity
10. Disabled		

H1. First Name – Enter the first name of the household member

H2. Last Name – Enter the last name of the household member

H3. Middle Initial – Enter the middle initial of the household member

H4. Relationship to HOH

Relationship to HOH

H - Head of Household

This is base on the household occupants where if there is only one occupant he will be place as the HOH and if there are 2 or more you can move in those occupants and choose the HOH.

H5. Date of Birth

Date of Birth

10/19/1927 

The date of birth of the household is chosen here where you can enter or click on the calendar and choose the

H6. FT Student?

FT Student?

2 - No| 

The FT Student provide you three options to choose from. They are,

- Yes
- No
- Did Not Disclose

If **FT Student?** is selected as **Yes**, then they should choose the household student exception given below or else it should show a validation message “**You must select a value for the Household Student Exception**”

Household Student Exception *

You will be provided with the following options to choose from,

- TANF Assistance
- Job Training Program
- Single Parent Dependent Child
- Married Joint Return
- Previous Foster Care Assistance

If you choose No or did not disclose the field “**Household Student Exception**” becomes non mandatory as shown in the image below,

Household Student Exception

H7. SSN-Last4

SSN-Last 4

4870

The last four digits or the household member’s SSN number will be mentioned here

H8. Race

American Indian or Alaska Native

The race is a dropdown field where you will choose the race of the household member. Once you click on this field you will show with the races list in the dropdown from where you can choose one.

H9. Ethnicity

Ethnicity

2 - Not Hispanic or Latino

The Ethnicity provide you three options to choose from they are,

- Hispanic or Latino
- Not Hispanic or Latino

- Did Not Disclose

H10. Disabled

Disabled

2 - No | ▾

If the household member or the head of the household is disabled you will choose “yes” or choose “no”. Here you will be provided with three options,

- Yes
- No
- Did Not Disclose

H11. Previous / Next



Once you have entered all the fields you can click on “NEXT”. Clicking on “PREV” will take you to the general section.

05.3 Household Member Income

WBARS Welcome EHA Property Manager

HARLAND MUNSON - OCCUPANTS DETAILS

GENERAL HOUSEHOLD MEMBER INFO **HOUSEHOLD MEMBER INCOME** SET-ASIDE AND RENT DATA

First Name	Last Name	(A) Employment or Wages	(B) SOC Sec/Pensions	Public Assistance	Other Income
Harland	Munson	\$0.00	\$17,408.00	\$0.00	\$0.00
Alice	Munson	\$0.00	\$15,787.00	\$0.00	\$0.00
		\$0.00	\$33,195.00	\$0.00	\$0.00
					Total Income: \$33,195.00

HH Mbr	(F) Type of Assets	(G) Current or Imputed	(H) Cash Value	(I) Annual Asset Income	Other Asset Type Description
Harland Munson	Checking	C	\$1,200.00	\$0.00	N/A
Totals:			\$1,200.00	\$0.00	

(0 X 2%) = Imputed Income: \$0.00
 (Greater of Imputed Income or Annual Asset Income) = Total Income From Assets: \$0.00
Total Annual Household Income - All Sources: \$33,195.00

The income information of the household members is shown in this section and it has the following fields,

1. First Name	2. Last Name	3. (A) Employment or Wages
4. (B) SOC Sec / Pensions	5. Public Assistance	6. Other Income
7. HH Mbr	8. (F) Type of Assets	9. (G) Current or Imputed
10. (H) Cash Value	11. (I) Annual Asset Income	12. Other Asset Type Description

M1. (A) Employment or Wages

(A) Employment or Wages

	\$0.00
\$0.00	

The household member is employed or if they receive any wage then the value will be entered here in this field

M2. (B) SOC Sec / Pensions

(B) SOC Sec/Pensions

	\$0.00
\$0.00	

Enter the value of the **SOC Sec / Pensions** if received by the household member.

M3. Public Assistance

Public Assistance

	\$0.00
\$0.00	

The value of the public Assistance is entered here if any.

M4. Other Income

Other Income

	\$9,721.00
--	------------

Do not use “other income” or “other fees” from this list unless there is no other suitable choice. If you use “other income” or “other fees” you must give specific detail in the Comments field. For example: an amount of \$5,400 is identified as “other income” and in the Comments you would put “\$5,000 cell phone antennae; \$400 soda machine”.

M5. HH Mbr

HH Mbr

▼

Name of the Head or the household will be shown here

M6. (F) Type of Assets

(F) Type of Assets

▼

This field is a dropdown which shows the asset type and you can choose one from the dropdown list.

M7. (G) Current or Imputed

(G) Current or Imputed

▼

Here you will be provided with 2 options C or I which means Current or Imputed where you can choose any one from the two accordingly.

M8. (H) Cash Value

(H) Cash Value

\$0.00

You will enter the cash value here in this field

M9. (I) Annual Asset Income

(I) Annual Asset Income

\$0.00

The income annually by the asset will be entered here.

M10. Other Asset Type Description

Other Asset Type Description

N/A

If you have chosen assert type as **others**, then this field will be enabled where you will enter the details about the other assert which you have mentioned. Otherwise this field will show N/A.

M11. Actions

Here you can click on the delete icon to delete the record where once you click on the icon you will shown with the confirmation message as shown in the image below,

Confirmation

Are you sure you want to delete this record?

YES NO

Click on Yes to delete or click on no to exit the process and You can click on ADD Rows to add new rows if required.

O5.4 Set Aside and Rent Data

GENERAL	HOUSEHOLD MEMBER INFO	HOUSEHOLD MEMBER INCOME
Move-in Restricted Unit Percentage *	Restricted Unit Percentage *	Previous Restricted Unit Percentage
50%	50%	50%
Move-in Annual Gross Income	Move-in Maximum Allowable Income	Currently Monthly Gross Income
\$33,196.00	\$42,800.00	\$2,766.33
Current Annual Gross Income *	Current Maximum Allowable Income	Actual % of Median Area Income
\$33,196.00	\$42,800.00	39%
Resident Payment *	Utility Allowance	Utility Allowance Source *
\$675.00	\$39.00	Public Housing Authority (S8) (2)
Total Resident Payment	Maximum Allowed Rent	Maximum Allowed HOME Rent
\$714.00	\$1,003.00	\$1,003.00
Total Subsidy Amount	Primary Rent Subsidy Type	
\$0.00		
Comment		

The final section of the of the occupant details is Set Aside and Rent Data. This section has the following fields,

1. Move in Restricted Unit Percentage	2. Restricted Unit Percentage	3. Previous Restricted Unit Percentage
4. Move-in Annual Gross Income	5. Move-in Maximum Allowance Income	6. Current Monthly Gross Income
7. Current Annual Gross Income	8. Current Maximum Allowable income	9. Actual % of Median Area Income
10. Resident Payment	11. Utility Allowance	12. Utility Allowance Source
13. Total Resident Payment	14. Minimum Allowed Rent	15. Maximum Allowed Home Rent
16. Total Subsidy Amount	17. Primary Rent Subsidy Type	18. Comment

S1. Move-In Restricted Unit Percentage

Move-In Restricted Unit Percentage *

50%

- It is a mandatory field for Restricted Units should be entered at the time of Move-In.
- On the initial household move in the user can choose any of the percentages from 25, 30, 35, 40, 45, 50, 60, 65, 80, 100.
- If the household unit moved in on current year and the report doesn't submitted to Funder, then it can be allowed for modification. Once the report submitted to Funder the field should be non-editable.

S2. Restricted Unit Percentage

Restricted Unit Percentage *

50%

- It is a mandatory field for Restricted Units and The LIH percentages fixed by the monitoring funders will be listed. Once you click on the dropdown you will be shown with the following to choose from,

- 35%
- 50%
- 60%
- if the project is funding by WSHFC and Commerce and they fixed LIH percentages as 30 and 60. Then Move-In RUP field should list the 30 and 60 percentages only.

S3. Previous Restricted Unit Percentage

Previous Restricted Unit Percentage

50%

Fields in this section may be pre-filled based on previous activity in the unit, not previous activity of that household. If Previous Restricted Unit Percent field shows as “N/A”, this is because unit was not previously rented to a restricted household, or else the unit was previously empty.

S4. Move-In Annual Gross Income

Move-in Annual Gross Income

\$11,664.00

- It is a mandatory field for Restricted units and should be entered at the time of Move-In.
- If the household unit moved in on current year and the report doesn't submitted to Funder, then you can't modify. Once the report submitted to Funder this field will be non-editable.
- It should not exceed the Move-In Maximum Allowable Income. If exceeds the validation icon colour should be changed to Green.
- Validation Issue section should show a validation message ***“Move-In Income is equal to or more than the maximum TC/HUD allowed income.”***

FYI - If the household is a new move-in, the Move-In Actual Annual Gross Income field must be filled in, even if the amount is only \$0. This field should not be changed after move-in.

S5. Move-in Maximum Allowance Income

Move-In Maximum Allowable Income

\$31,400.00

Move-In Maximum Allowable Income field auto-fills with the correct income limit per the Site's county, the household size, the restricted percentage selected and by comparing the move-in date to the income limit table effective date.

If the Move-In Actual Annual Gross Income is greater than the Move-In Maximum Allowable Income, a yellow status will appear above the section name.

S6. Current Monthly Gross Income

Currently Monthly Gross Income

\$810.08

This field will be auto filled where you can view the field and can't access.

S7. Current Annual Gross Income

Current Annual Gross Income *

\$9,721.00

- This is a mandatory field for Restricted Units. It should not exceed the Current Maximum Allowable Income. If exceeds the validation icon should change from Green to Yellow

If the annual income exceeds the limit fixed by the restrictive funder then it shows a validation message in validation issue section as well as in Report Table

S8. Current Maximum Allowable income

Current Maximum Allowable Income

\$37,450.00

This Field will be auto-filled per the Site's county, the household size, the restricted percentage selected and by comparing the new move-in date or most recent certification date to the income limits table effective date.

S9. Actual % of Median Area Income

Actual % of Median Area Income

13%

Actual Monthly Gross Income and **Actual % of AMI** fields auto-calculate, and auto-fill based on the amount entered the Current Annual Gross Income field.

S10. Resident Payment

Resident Payment *

\$194.00

Amount should be entered. If the user doesn't enter any amount and attempts to save the record, then it should show a validation message "Please enter a Resident Payment Amount greater than zero."

If Resident Payment amount plus Utility Allowances amount is greater than Maximum Allowed Rent, then it should show a validation message "***The Resident Payment + Utility is more than the maximum allowable Rent.***"

S11. Utility Allowance

Utility Allowance

\$49.00

S12. Utility Allowance Source

Utility Allowance Source *

Public Housing Authority (S8) (2) ▼

Utility Allowance Source drop-down list field choose the UA source from the list of available sources for this building (UA amounts have been entered for each building on the Site and Buildings page). Please note that the tenant record will not save unless a utility allowance has been selected.

- 1) Please note that there is a checkbox available in-home program section on Funder Settings Page named "HOME funds committed after 08/23/2013" if it is checked and the PM selects a unit as HOME unit on the Table 1 details page, the UA "Public Housing Authority" is not allowed. It should be visible but greyed out and a warning message should be displayed. (Greyed and not selectable.) A message should be displayed "You are not allowed to select Public Housing authority as UA".

- 2) If any projects whose funds were committed after 8/23/2013 and when a PM selects it as a HOME unit then the UA allowance should no longer display Public Housing Authority.
- 3) If a household unit doesn't designate as HOME unit then it should allow to select Public Housing Authority.

S13. Total Resident Payment

Total Resident Payment
\$243.00

S14. Maximum Allowed Rent

Maximum Allowed Rent:
\$1,203.00

This field is not editable and will auto-fill according to the rent limits which pertain to the Project, Site and Unit. Please note that in some cases the **HOME Maximum Rent** may be more restrictive than the Maximum Allowed Rent. WBARS will auto-fill based upon the household size and the date the household moved in. The rent limits are entered and changed only by Funders.

The amount in the Total field will be compared to the rent figure in the Maximum Allowed Rent field; if it is greater, a yellow status icon will appear.

S15. Total Subsidy Amount

Total Subsidy Amount: *
\$836.00

Any rental subsidy paid on behalf of the tenant would be entered here. If the user chooses Primary Rent Subsidy Type and doesn't enter any total subsidy amount and attempts to save the household detail, then it should show a validation message "Please enter a valid Total Subsidy Amount. (Required when a Primary Rent Subsidy Type is specified).

S16. Primary Rent Subsidy Type

Primary Rent Subsidy Type:

S17. Comment

Comment:

You can enter any comments here which will be viewed by the next level users and can understand if the comments relate to any of the validations or any specific information

Users

The WBARS has several users where each user has their own set of access and actions to be performed and the “User” section shows the list of users associated with the system.

U1. How to view the users list?

Click this Icon under the menu bar and the user details page will be shown. The list of users shown will vary based on the user login. Let’s see the user Login and the differences below,

Funder

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State
Michael Soper	Washington State Housi...	Organization Admin	Read/Write	129	1000 2nd Avenue, Suite...	Seattle	Washington
Nona White	Department of Commerce...	Organization Admin	Read/Write	26	906 Columbia Street SW...	Olympia	Washington
Michael Dill	Washington State Housi...	Organization Admin	Read/Write	119	1000 2nd Avenue, Suite...	Seattle	Washington
Lisa Vatske	Department of Commerce...	Organization Admin	Read/Write	0			Washington
Robert E. Davis	Snohomish County Housi...		Read/Write	0	12625 - 4th Ave W, Sui...	Everett	Washington
Joyce Orchard	Washington State Housi...		Read/Write	0	1000 2nd Avenue, Suite...	Seattle	Washington
Marji Johnson	Washington State Housi...	Organization Admin	Read/Write	141	1000 2nd Avenue, Suite...	Seattle	Washington
Duane Bakke	Washington State Housi...	Organization Admin	Read/Write	133	1000 Second Avenue, Su...		Washington
Cindy Erickson	Seattle Office of Hous...		Read/Write	0	PO Box 94725 700 Fifth...	Seattle	Washington

Displaying 1 to 9 of 3885 records

The funder has the authority and access to view the overall users in the WBARS system and they can add New Users.

Owner / Organization Admin

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State
Sandra Back	Everett Housing Author...	Onsite Manager	Read/Write	0	3107 Colby Ave	Everett	Washi
EHA On-Site Manager	Everett Housing Author...	Onsite Manager	Read/Write	26	PO Box 1547	Everett	Washi
Jill Stanton	Everett Housing Author...	Organization Admin	Read/Write	0	3107 Colby Ave	Everett	Washi
Debra Goettel	Everett Housing Author...	Onsite Manager	Read/Write	0	3107 Colby Ave	Everett	Washi
Desree Michael	Everett Housing Author...	Organization Admin	Read/Write	0			Washi
Vanessa Cochran	Everett Housing Author...		Read/Write	0	P O Box 1547	Everett	Washi
EHA Property Manager	Everett Housing Author...	Onsite Manager	Read/Write	54	PO Box 1547	Everett	Washi
Sandra Lee	Everett Housing Author...	Onsite Manager	Read/Write	0	PO Box 1547	Everett	Washi
Ashley Lommers-Johnson	Everett Housing Author...	Organization Admin	Read/Write	100	PO Box 1547	Everett	Washi
Ellen Michaud	Everett Housing Author...		Read/Write	0	P OBox 1547	Everett	Washi
Tom Eadie	Everett Housing Author...		Read/Write	0			Washi

Displaying 1 to 11 of 17 records

The Owner / Organization Admin can view the list of all users associated with his Organization and they can add the users within their organization.

Property Manager

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State
Sandra Back	Everett Housing Author...	Onsite Manager	Read/Write	0	3107 Colby Ave	Everett	Washi
EHA On-Site Manager	Everett Housing Author...	Onsite Manager	Read/Write	26	PO Box 1547	Everett	Washi
Jill Stanton	Everett Housing Author...	Organization Admin	Read/Write	0	3107 Colby Ave	Everett	Washi
Debra Goettel	Everett Housing Author...	Onsite Manager	Read/Write	0	3107 Colby Ave	Everett	Washi
Desiree Michael	Everett Housing Author...	Organization Admin	Read/Write	0			Washi
Vanessa Cochran	Everett Housing Author...		Read/Write	0	P O Box 1547	Everett	Washi
EHA Property Manager	Everett Housing Author...	Onsite Manager	Read/Write	53	PO Box 1547	Everett	Washi
Sandra Lee	Everett Housing Author...	Onsite Manager	Read/Write	0	PO Box 1547	Everett	Washi
Ashley Lommers-Johnson	Everett Housing Author...	Organization Admin	Read/Write	98	PO Box 1547	Everett	Washi
Ellen Michaud	Everett Housing Author...		Read/Write	0	P OBox 1547	Everett	Washi
Tom Eadie	Everett Housing Author...		Read/Write	0			Washi

The property manager can view the users in their organizations where they have no access to create or edit the user details and have only the view access.

U2. All Users

“All Users” is the page title where the list of all user details will be displayed. The user detail listings will vary based on the Login where,

Funder – can view the complete list of users in the WBARS

Contractor / Manager – Can view the users associated with their organization

U3. Add / Create a New User

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State
TES PK	Clark County Dept of C...	Organization Admin	Read/Write	0			
Bhavana Prabhu	Bhavana	Organization Admin	Read/Write	0			
prabhu kuppusamy	Department of Commerce...	Organization Admin	Read/Write	0			
P K	Department of Commerce...		Read/Write	0			
Washington State Hou...			Read/Write	0			
a w	Department of Commerce...		Read/Write	0			
Read Funder fund	Vitus Group		Read	0			
Spencer Fain	Department of Commerce...		Read/Write	0			Washi
Jennifer Westerman	Joint Pacific County H...		Read/Write	0			Washi
J David Page	Vinland Housing Corpor...	Organization Admin	Read/Write	1	1911 65th Ave. W	Tacoma	Washi

The users can be added by the Funder and the Owner / Organization Admin. Let's explore how to add a user.

Step 1 – Click on the “Add” icon and the page to create / add a new user is shown. The screenshot of the page “Create New User” is shown below,

Step 2 - “Create New User”, Enter the required fields in order to create a “New User”


The dropdown fields are auto filled by the system and the fields with “*” symbol are mandatory fields where a new user can't be created without entering those fields. The overall field details and their properties can be explored in “[My Profile](#)” **General** Section.

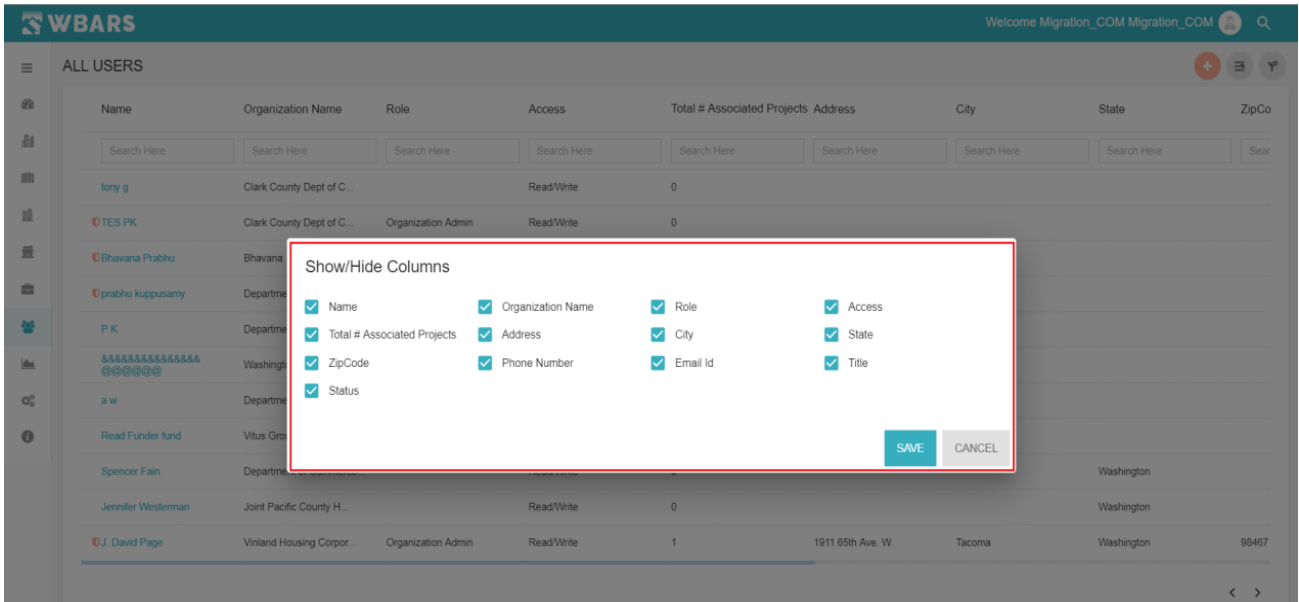
U4. Select the Column

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State	ZipCo
tony g	Clark County Dept of C...		Read/Write	0				
TES PK	Clark County Dept of C...	Organization Admin	Read/Write	0				
Bhavana Prabhu	Bhavana	Organization Admin	Read/Write	0				
prabhu kuppusamy	Department of Commerce...	Organization Admin	Read/Write	0				
P K	Department of Commerce...		Read/Write	0				
##### @@@@@	Washington State Housi...		Read/Write	0				
a w	Department of Commerce...		Read/Write	0				
Read Funder fund	Vitus Group		Read	0				
Spencer Fain	Department of Commerce...		Read/Write	0			Washington	
Jennifer Westerman	Joint Pacific County H...		Read/Write	0			Washington	
J. David Page	Vinland Housing Corpor...	Organization Admin	Read/Write	1	1911 65th Ave. W.	Tacoma	Washington	98467

The columns shown under “All Users”

Name	Organization Name	Role	Access	Total # Associated Projects	Address	City	State	ZipCo
------	-------------------	------	--------	-----------------------------	---------	------	-------	-------

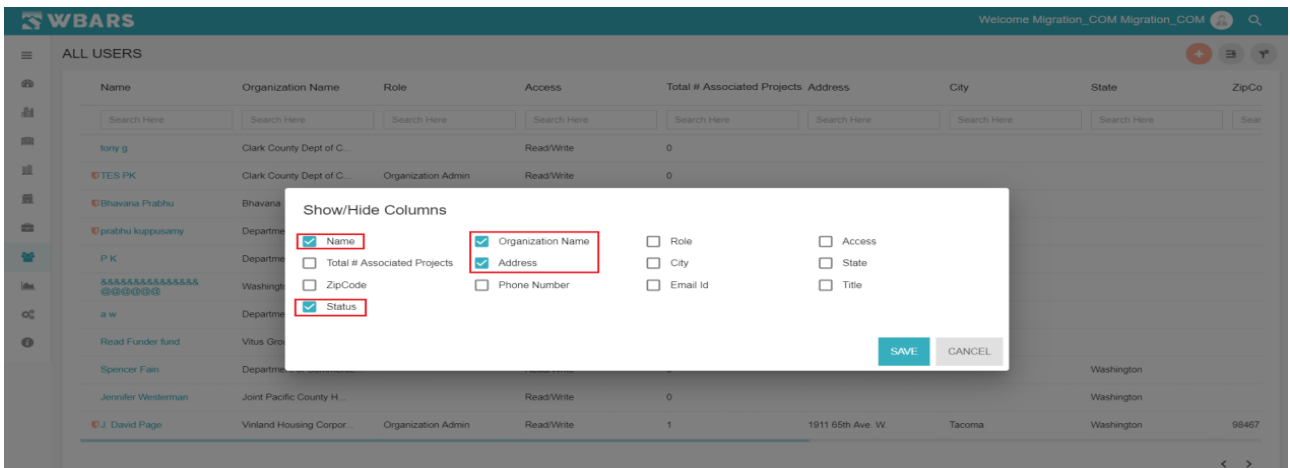
can be customized by clicking the “Select the Columns” icon  and the popup with the title “Show / Hide Columns” will be shown as shown in the screenshot below, where you can customize the columns to be displayed by clicking the checkbox where the only the checked columns will be displayed under “All Users”.



To understand the above functionality clearly here I am showing you an example. In the “Show/Hide Columns” I am checking the following fields,

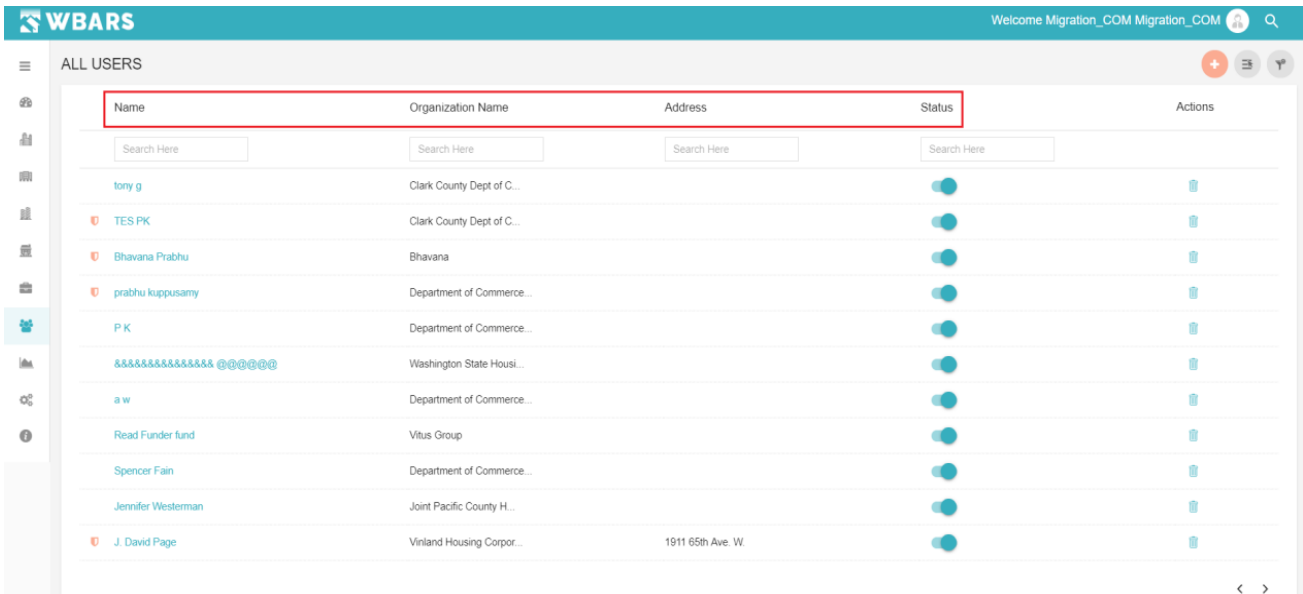
- Name
- Organization Name
- Address
- Status

Click on “SAVE” once you check the columns. Please find the screenshot for the checked columns below,

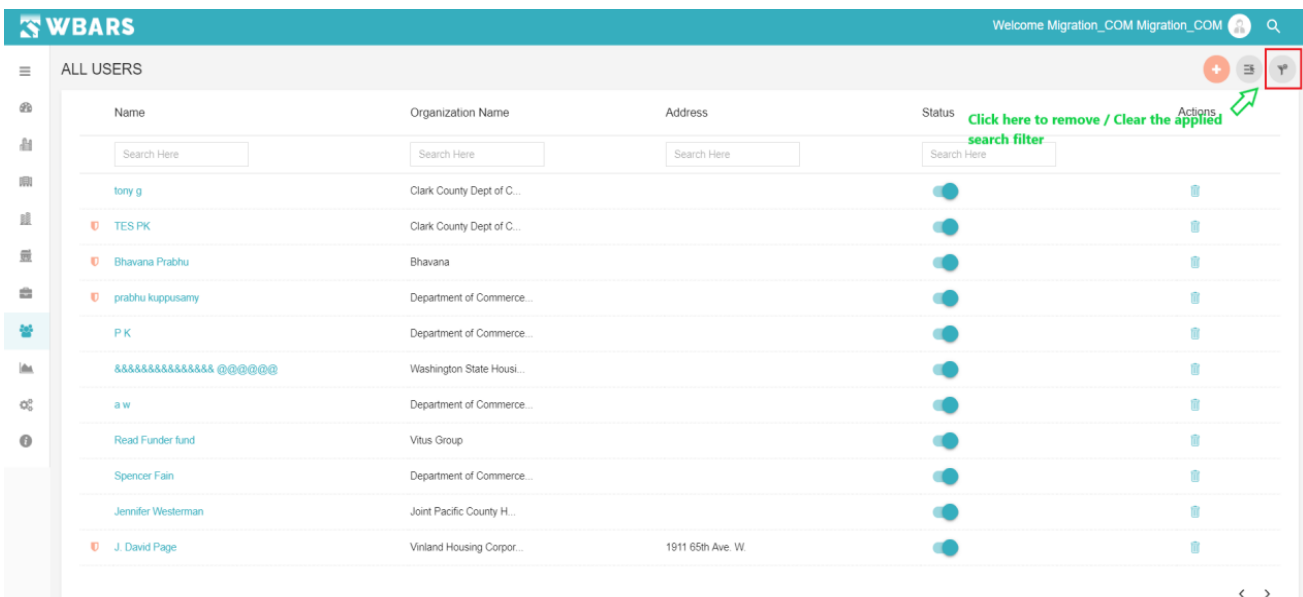


As shown in the above image only the checked columns will be displayed in “All Users” page.


Please find the screenshot below,



U5. Clear Filter



The filters applied in the Search fields are cleared using “Clear Filter”. Let us see how the clear filter option works.

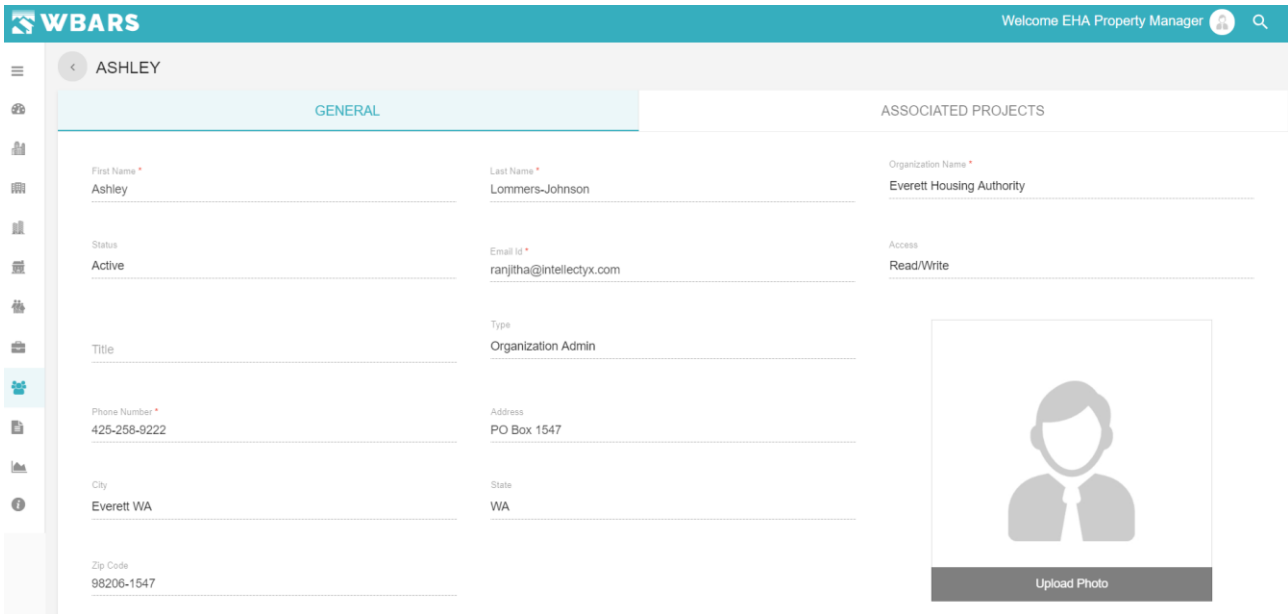
Every column has a “Search Here” field where you can type and search for the required details related to the column and by clicking the “Clear  Filter” icon all the characters typed in the search field will be cleared.

U6. How to view the User Details?

If you want to know the details of a specific user, then you will click on the name of the user under the column **“Name”** where the details of that user will be shown and it will have two sections,

1. General
2. Associated Projects

The below screenshot shows the user detail page,



U7. How to delete the User?

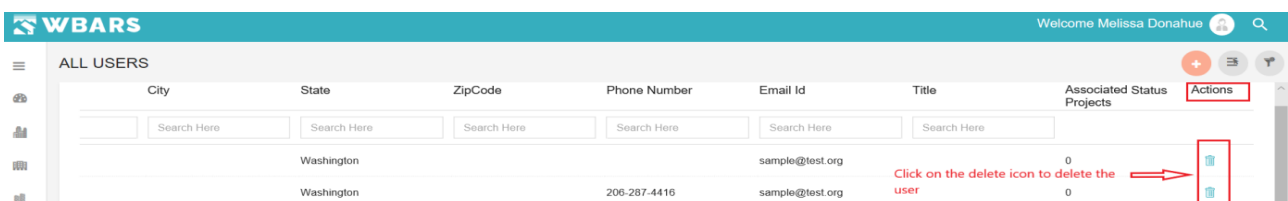
In case if you need to remove the added User, under **“Actions”** you can see the **“Delete”** icon Click on it and the confirmation to delete the User will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on **“Yes”** if you need to delete the record or click **“No”**. The location of the delete icon is shown in the screenshot below,



Compliance

The compliance page is where the validation conditions are set where only the **Funders** can set the validations and can add new validations. The screenshot of the Funder Compliance page is shown below,

- Global Compliance Settings – For Funders
- All Compliance Settings – For Contractors / Managers

Funders


Table	FieldA	Condition	FieldB	Value	ValueType	Type	Message	Status
Table 1	Table 1 Subsidy Amount	>		0	Dollar	Warning	A Subsidy Type was sele	<input checked="" type="checkbox"/>
Table 1	Table 1 Move-in Annual Gross Income	<		0	Dollar	Warning	Must have Move In Incon	<input type="checkbox"/>
Table 1	Table 1 Household Size	<		0	Number	Hard Stop	Household Size required	<input checked="" type="checkbox"/>
Table 1	Table 1 Move-out-Date	>		3	Month	Warning	(Disabled on 10/13/2010;	<input checked="" type="checkbox"/>
Table 1	Table 1 Recent Certified Date	>		12	Month	Warning	Difference between Certi	<input checked="" type="checkbox"/>
Table 1	Table 1 Resident Payment Amount	>	Table 1 Maximum Allowable Rent		Dollar	Hard Stop	The Resident Payment +	<input checked="" type="checkbox"/>
Table 1	Table 1 Recent Certified Date	=		140	Number	Hard Stop	The unit must have a cur	<input checked="" type="checkbox"/>
Table 1	Table 1 Annual Gross Income	>	Table 1 Maximum Allowable Income	140	Percentage	Warning	Annual Income exceeds i	<input checked="" type="checkbox"/>
Table 1	Table 1 Recent Certified Date	<	Table 1 Move-out-Date			Hard Stop	Recert dates must be wit	<input checked="" type="checkbox"/>
Table 1	Table 1 Annual Gross Income	=				Hard Stop	*Total Annual Household	<input checked="" type="checkbox"/>

Contractors / Managers

Project Name	Site Name	Unit Name	Household Name	Table	Validation Message	Actions
<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	
EHA Senior Housing Por...	Lake Woods II Senior A...			4	Table 4A Reserves: Sta...	<input type="checkbox"/>
EHA Senior Housing Por...	Lake Woods II Senior A...			2	Section 7 - The total ...	<input type="checkbox"/>
EHA Senior Housing Por...	Lake Woods II Senior A...			2	Section 4 - Head of Ho...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows III Senior Apa...			2	Section 7 - The total ...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows III Senior Apa...			4	Table 4A Reserves: Sta...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows III Senior Apa...			2	Section 4 - Head of Ho...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows II Senior			2	Section 7 - The total ...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows II Senior			4	Table 4A Reserves: Sta...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows II Senior			2	Section 4 - Head of Ho...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows Senior Apartme...			2	Section 7 - The total ...	<input type="checkbox"/>
EHA Senior Housing Por...	Meadows Senior Apartme...			4	Table 4A Reserves: Sta...	<input type="checkbox"/>


Displaying 1 to 11 of 2370 records

From the above screenshots you can clearly see the difference where the **Funders** will have the option to add the validations and **Contractors / Managers** will have the option to view all the

projects which have validation issues and they can access the projects and look onto validations directly for the "ALL COMPLIANCE ISSUES" Page by clicking "View Report"  icon under actions. The location of the icon is shown in the screen shot below,

Project Name	Site Name	Unit Name	Household Name	Table	Validation Message	Actions
EHA Senior Housing Por...	Lake Woods II Senior A...			4	Table 4A Reserves: Sta...	
EHA Senior Housing Por...	Lake Woods II Senior A...			2	Section 7 - The total ...	
EHA Senior Housing Por...	Lake Woods II Senior A...			2	Section 4 - Head of Ho...	

C1. How to Add New Compliance?

Only the **Funder** have the access to add a new compliance. Click on the "Add"  button where the row requesting the following details will be shown,

- Table
- Field A
- Condition
- Field B
- Value
- Value Type
- Type
- Message
- Status

The Screenshot after clicking the add button is shown below,

Table	FieldA	Condition	FieldB	Value	ValueType	Type	Message	Status
Table 1 Table 1 Subsidy Amount		>		0	Dollar	Warning	A Subsidy Type was sele	
Table 1 Table 1 Move-in Annual Gross Income		<		0	Dollar	Warning	Must have Move In Incon	

C1.1 Table

Table	FieldA	Condition	FieldB	Value	ValueType	Type	Message	Status
Table 2								

The Table will have all the four tables where you will choose the table for which you are creating the validation by clicking the dropdown you will be shown with the table names and you can click on the name to choose it.

C1.2 Field A



The “Filed A” a is a dropdown where it will show you the options to choose according to the table which is chosen. In case if you didn’t choose a table then this field will show you “No Options”. So make sure that you choose the table before you choose Field A.

C1.3 Condition



The Condition will have the operators (>, <, <=, >=, !=) where you will choose the required condition for the validation.

C1.4 Field B



The “Filed B” a is a dropdown where it will show you the options to choose according to the table which is chosen. In case if you didn’t choose a table then this field will show you “No Options”. So make sure that you choose the table before you choose Field B.

C1.5 Value



Enter the Numerical value if required.

C1.6 Value Type

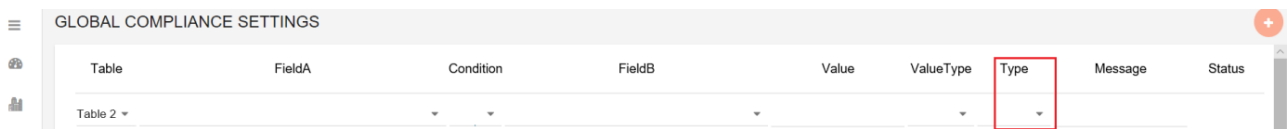


The value type will have the following options,

- Percentage
- Dollar
- Number
- Month
- Year

You can choose the value type by clicking on it.

C1.7 Type



The type has two options to choose from,

- Warning
- Hard Stop

Warning – You can proceed further and submit the report to next level if there is a warning where you can provide the comment for the warning.



Hard Stop – You can't proceed further and submit the report to next level without clearing the hard stop issue.

C1.8 Message



The validation message that must be shown will be entered here. So when there is an issue occurring the message which you have provided here will be shown to user where he can understand where the issue is and clear the issue.


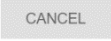
C1.9 Status

Click on the "Status Icon" to make the expense category Active  / Inactive  The status option helps you to keep the added compliance "Active / Inactive". Instead deleting the

added compliance, you can change the status “Inactive” where the validation isn’t seen in the reports table and you can make it “Active” again if needed.

C1.10 Save / Cancel



You can click on  after providing all the required fields where the changes made will get saved in the system. If you wish to leave the page without saving you can click on 

You can see this option at the bottom of the page.

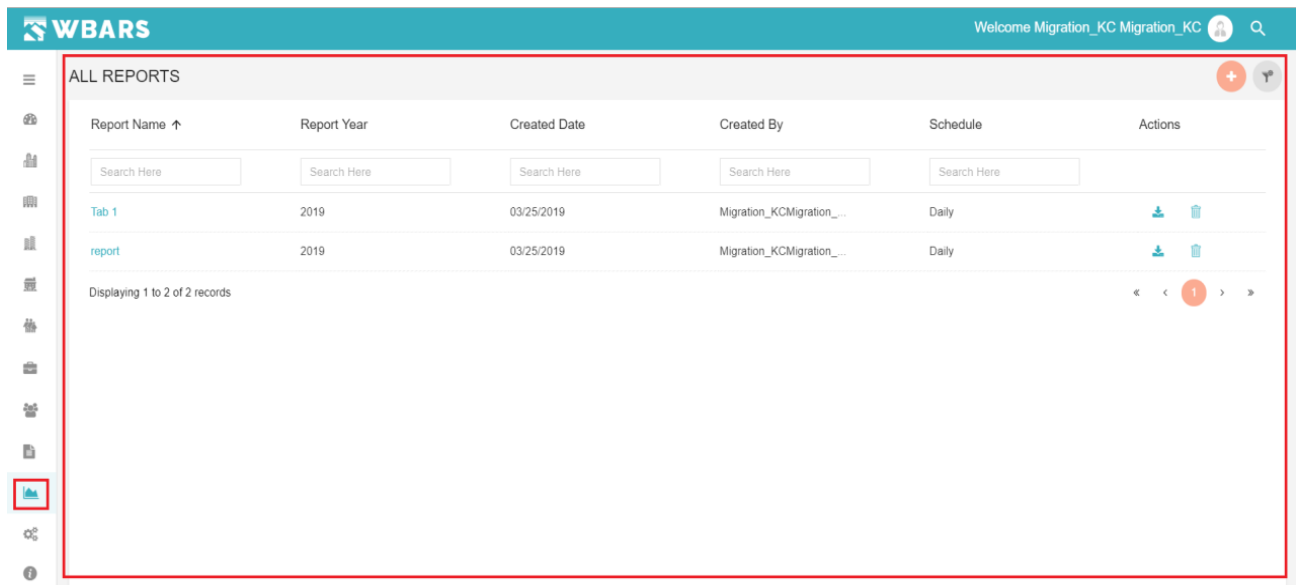
If you click on save without providing any details then you will shown with a warning message as shown in the image below,




Explore Data

“Explore Data” helps you to uncover or to explore the large set of data in an unstructured way so that you can examine a whole set of data without any preconceptions.

In explore data you can create your own reports which you need to view where you can select the required field for which the report will be created. The below screenshot shows where the “Explore Data” option is in the WBAR system.




All the user of the WBARS can access “Explore Data” where the details of the reports they create will be related to their user login.

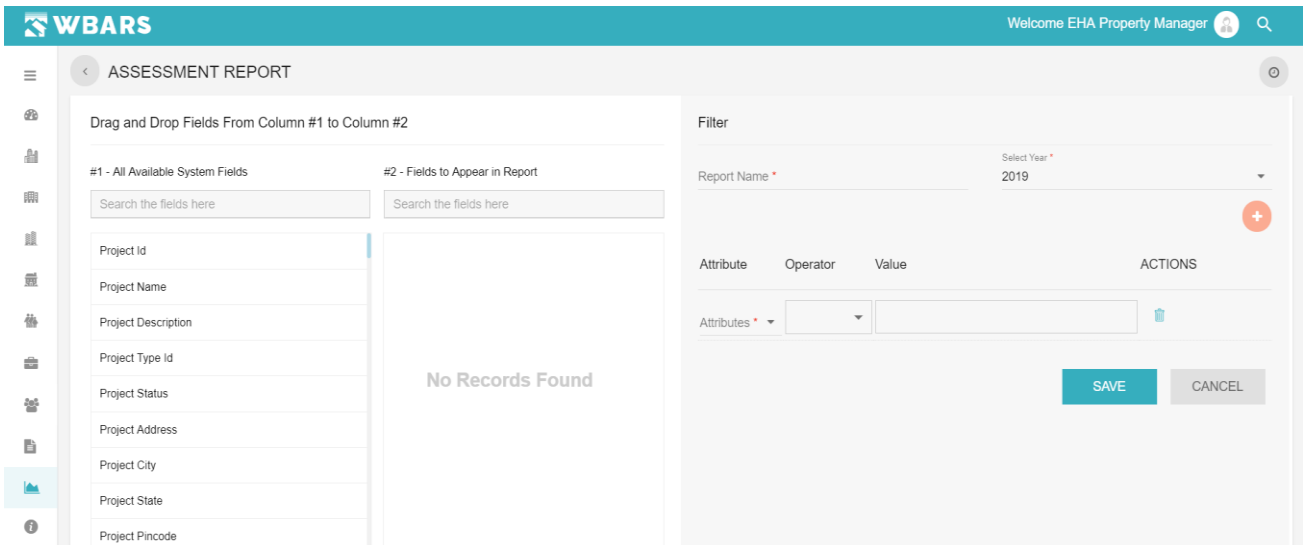
To access “Explore Data” click on this  icon under the “Menu” and the page will be shown

“All Reports” is the page title where all the reports which are created by you gets listed and the “Explore Data” has the following details,


- Add Report
- Clear Filter
- Report Name
- Report Year
- Created Date
- Created By
- Schedule
- Actions

E1. Add Report

Once you click on “Add”  button the “Assessment Report” page will be shown where you can generate the reports. The screenshot of the page is shown below



Let’s see the step by step process on how we can create a report,

Step 1 – Click on the “Add”  Button in “All Reports” section and the “Assessment Report” page will be shown where you can generate the required reports. The screen shot of the page is shown above.

Step 2 – Drag and Drop Fields from Column 1 to Column 2

The Drag and drop option have 2 fields available. They are,

- All available system fields
 - Fields to appear in report
- **All available system fields**

#1 - All Available System Fields

Site Id
Building Name
Building BIN

The overall fields in the WABRS system is shown here where you can drag and drop the fields from here to the “**Fields to appear in the report**”.

E2. “How to Drag and Drop?”

I heard you, just double click on the required field (hold the second click) and then drag the mouse pointer to the column 2 or hold Right click then drag the pointer to column to where the field gets placed.”

Search Field - You can search any field by typing the field name in the search field. The search field image is shown below,

- **Fields to appear in the report**

#2 - Fields to Appear in Report

<input type="text" value="Search the fields here"/>
Building Name
Building Address
Utility Allowance Bedroom Id

All the fields which are dragged from “**All available system fields**” is dropped here.

Search Field - You can search any field by typing the field name in the search field. The search field image is shown below,

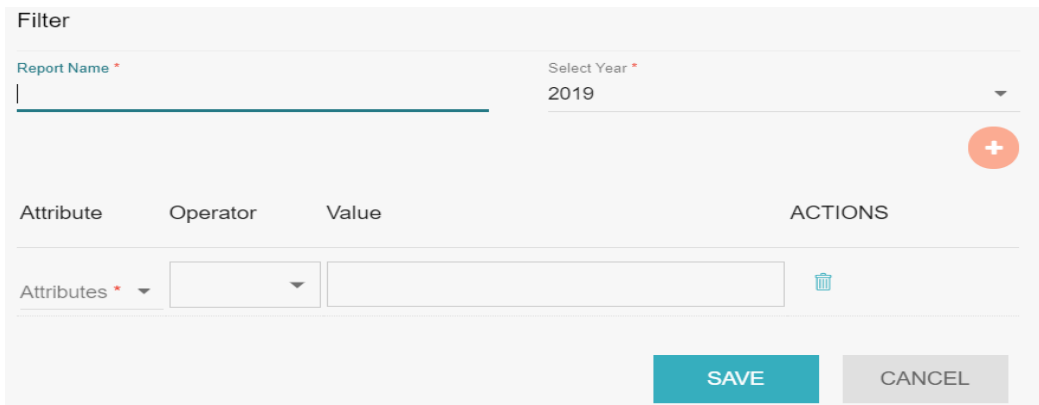
Step 3 – Filter

The filter allows you to set the criteria for the report to be created. The filter has the following fields that need to be provided by us. They are,

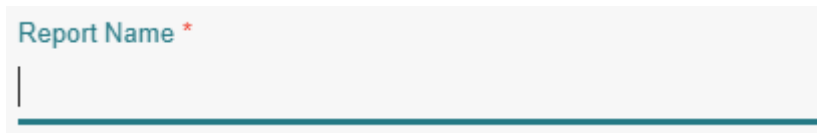
- Report Name
- Select Year

- Add Field
- Attribute
- Operator
- Value
- Actions

The screenshot of the filter section is shown below,



E3. Report Name

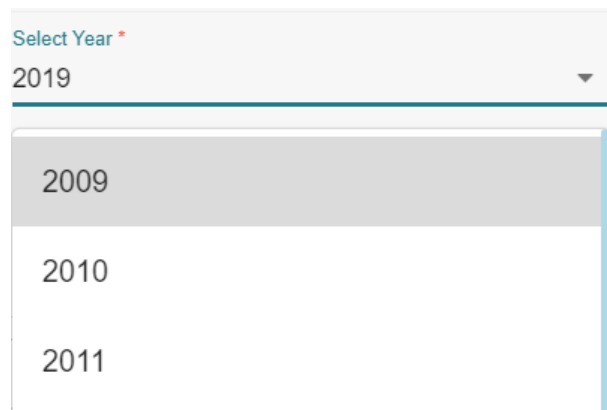



The report name is the field where you will type the name of the report which you are creating. You can click on the field and start typing the report name.

Condition

- Mandatory field (*) Changes can't be saved without entering this field

E4. Select Year

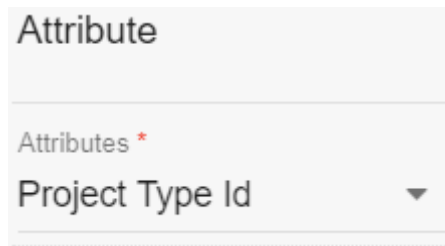



The year for which the report should be generated is chosen here. To choose the year, you need to  click on the dropdown icon or click on the field where the list of years will be shown from there you can choose the year and you can even type the year where the result will be shown in the dropdown and you can choose it.

Condition

- Mandatory field (*) Changes can't be saved without entering this field

E5. Attribute

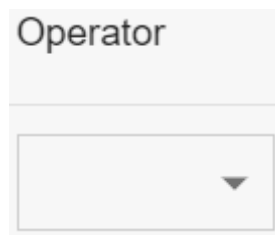


The "Attribute" has the complete system fields where you need to choose the attributes by clicking the dropdown icon  or click on the field where the list of attributes will be shown from there you can choose or you can type the attribute name and search for it where the result will be shown in the dropdown and you can choose it.

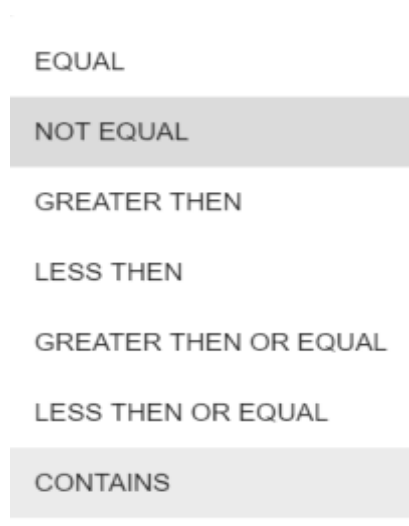
Condition

- Mandatory field (*) Changes can't be saved without entering this field

E6. Operator

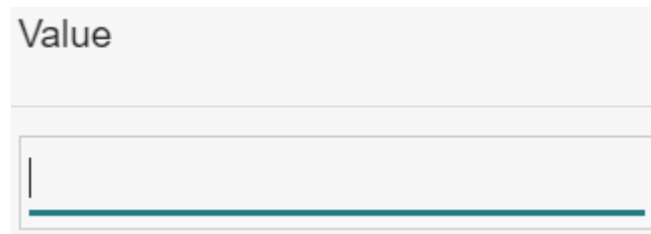


The operator is the required condition which you choose to fulfil the criteria that the report should contain. The list of operators is shown in the image below,



A vertical dropdown menu with the following options: EQUAL, NOT EQUAL, GREATER THEN, LESS THEN, GREATER THEN OR EQUAL, LESS THEN OR EQUAL, and CONTAINS. The 'NOT EQUAL' and 'CONTAINS' options are highlighted with a grey background.


E7. Value



A text input field with the label 'Value' above it. The field is currently empty and has a blue underline at the bottom.

The value is a text field where you can type any relevant character which makes the report filter accurate and the relevant report is created.

Click on **“SAVE”** to generate the report or Click on **“CANCEL”** if you don't wish to save and generate a report.

In case if you need to remove the added field, under **“Actions”** you can see the **“Delete”** icon  Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on **“Yes”** if you need to delete the record or click **“No”**.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details. All the Mandatory (*) fields should be entered before saving.

Filter

Report Name * Select Year * ▼
 this field is required this field is required

+

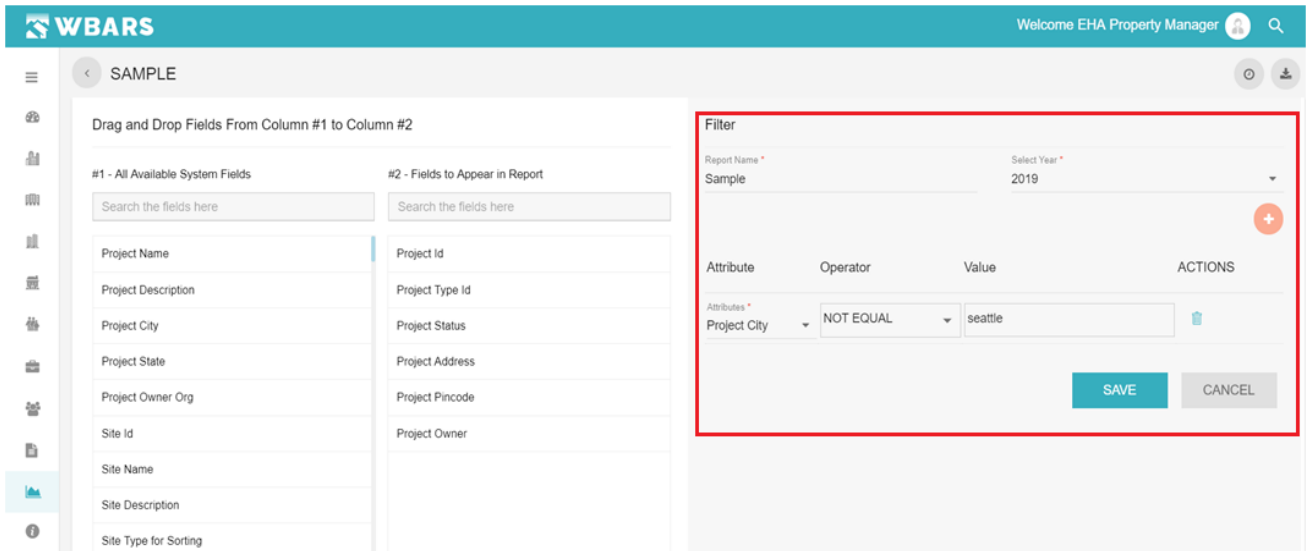
Attribute	Operator	Value	ACTIONS
Attributes * this field is required	 this field is required	 this field is required	

SAVE
CANCEL

Here is an example to understand on how to use the “Filter”

The screenshot shows the WBARS interface with a sidebar on the left and a main content area. The sidebar has a search bar and a list of fields under "#1 - All Available System Fields". The main content area has a "Filter" section and a "Drag and Drop Fields From Column #1 to Column #2" section. The "Filter" section has "Report Name" set to "Sample" and "Select Year" set to "2019". Below it, a table shows a filter rule: "Project City" with the operator "NOT EQUAL" and the value "seattle". The "Drag and Drop" section has two columns: "#1 - All Available System Fields" and "#2 - Fields to Appear in Report". The fields in column #2 are highlighted with a red box: Project Id, Project Type Id, Project Status, Project Address, Project Pincode, and Project Owner.

- In the above image the highlighted section shows you the fields dragged and dropped from column 1 to column 2. The fields which are in column 2 are the report fields which will be generated.
- Once you drag and drop the required fields as next step you should provide the relevant filter details. The sample filter details are highlighted in the below image,



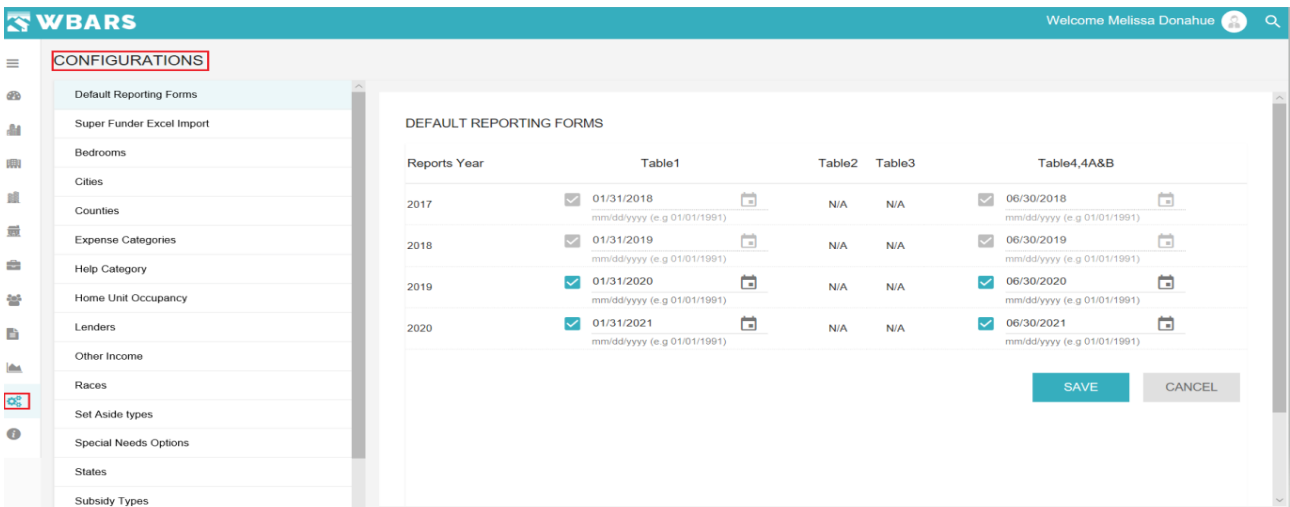
- Enter the Report name (**Ex. Sample**)
- Choose the report year which you are looking for (**Ex. 2019**)
- Choose the Attribute, Operator and Value (**Ex. Attribute is Project City / Operator is Not Equal / Value is Seattle**)

The report generated for the above set criteria will have all the field details in column 2 having the project city details ignoring Seattle. So accordingly, you can set any desired criteria with which you need the report to be.

Configurations

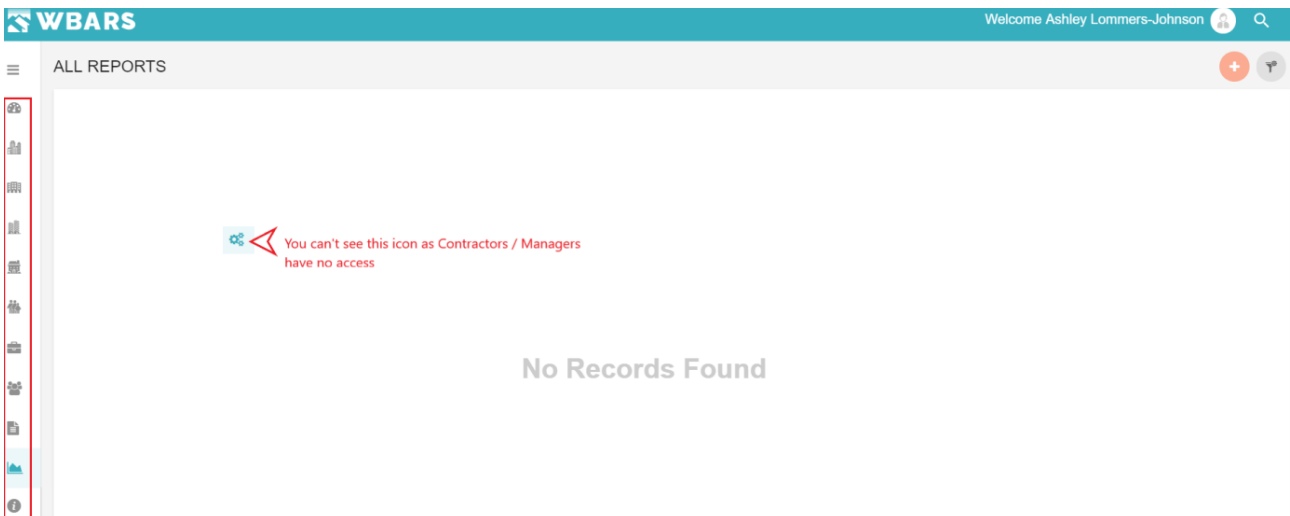
The configurations have the overall criteria settings of the WBARS system where the Funder can set the acceptance criteria for each module where the set criteria will be shown for each field and the Funder can edit, delete and update the record field when required. Let us see each part of configurations in detail. The screenshot of the Funder configurations section is shown in the image below.

Funder



The Configurations is available only for the **Funder** where the **Contractors / Managers** will not have this option as shown in the image below,

Contractors / Managers



The Configurations has the following fields,

CONFIGURATIONS

1. Default Reporting Forms	2. Super Funder Excel Import	3. Bedrooms
4. Cities	5. Counties	6. Expense Categories
7. Help Category	8. Home Unit Occupancy	9. Lenders
10. Other Income	11. Races	12. Set Aside Types
13. Special Needs Options	14. States	15. Subsidy Types
16. Utility Allowance Source	17. Utility Allowance Types	

C1. Default Reporting Forms

WSHFC Users

Reports Year	Table1	Table2	Table3	Table4,4A&B
2017	<input checked="" type="checkbox"/> 01/31/2018 mm/dd/yyyy (e.g 01/01/1991)	N/A	N/A	<input checked="" type="checkbox"/> 06/30/2018 mm/dd/yyyy (e.g 01/01/1991)
2018	<input checked="" type="checkbox"/> 01/31/2019 mm/dd/yyyy (e.g 01/01/1991)	N/A	N/A	<input checked="" type="checkbox"/> 06/30/2019 mm/dd/yyyy (e.g 01/01/1991)
2019	<input checked="" type="checkbox"/> 01/31/2020 mm/dd/yyyy (e.g 01/01/1991)	N/A	N/A	<input checked="" type="checkbox"/> 06/30/2020 mm/dd/yyyy (e.g 01/01/1991)
2020	<input checked="" type="checkbox"/> 01/31/2021 mm/dd/yyyy (e.g 01/01/1991)	N/A	N/A	<input checked="" type="checkbox"/> 06/30/2021 mm/dd/yyyy (e.g 01/01/1991)


Department of commerce Users

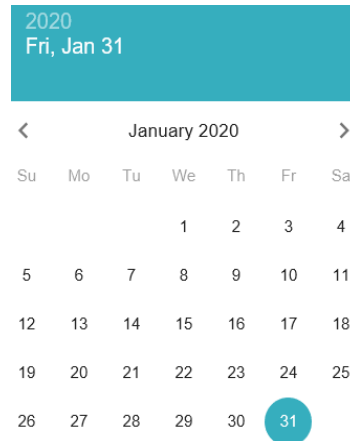
Reports Year	Table1	Table2	Table3	Table4,4A&B
2017	<input checked="" type="checkbox"/> 01/31/2018 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2018 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2018 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 06/30/2018 mm/dd/yyyy (e.g 01/01/1991)
2018	<input checked="" type="checkbox"/> 01/31/2019 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2019 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2019 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 06/30/2019 mm/dd/yyyy (e.g 01/01/1991)
2019	<input checked="" type="checkbox"/> 01/31/2020 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2020 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2020 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 06/30/2020 mm/dd/yyyy (e.g 01/01/1991)
2020	<input checked="" type="checkbox"/> 01/31/2021 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2021 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 01/31/2021 mm/dd/yyyy (e.g 01/01/1991)	<input checked="" type="checkbox"/> 06/30/2021 mm/dd/yyyy (e.g 01/01/1991)

The default reporting years for the report tables can be set here where the WSHFC users will have

no requirement for Table 2 and 3 and the other user will have all the report tables. If the report table is not required, then it will be denoted as N/A.

The default report year for the previous year and the current year can be set. To set the year follow the following steps,

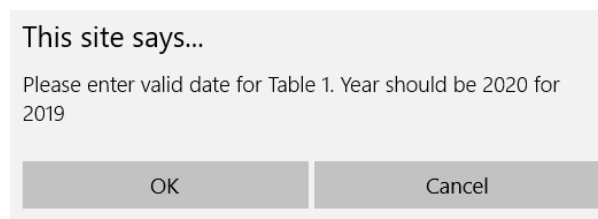
Step 1 – Click on the “**Calendar**” Button  and the calendar will be shown as in the image below,



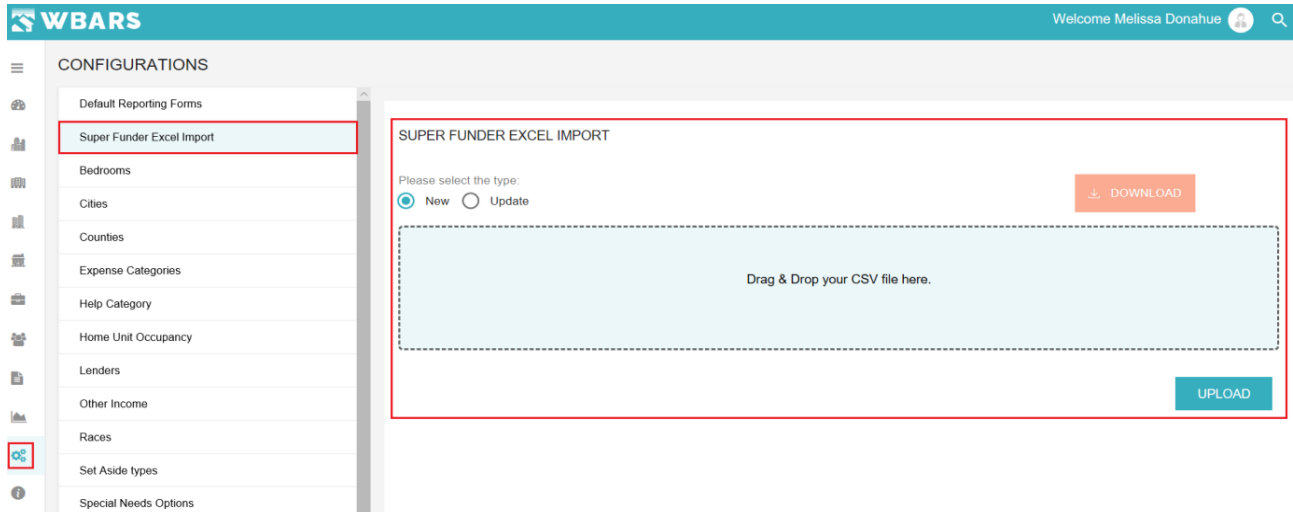
Step 2 – Choose the required date just by clicking on the date and the date will be set for the table report year. Or you can type the date in the following format mm/dd/yyyy (e.g 01/01/1991)

Step 3 – Click on “**SAVE**” and the changes made will be saved or click on “**CANCEL**”.

A warning message will be shown if you provide an exceeding report year as in the image below,



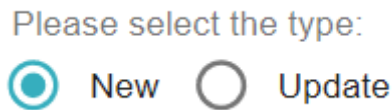
C2. Super Funder Excel Import



The data can be imported here as new or you can update the existing data.

Step 1 – Please select the type.

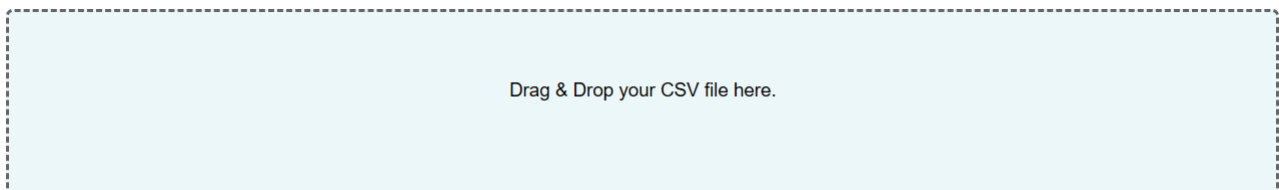
You will be provided with two options as shown in the image below,



You will select the required type by clicking the radio button **New** or **Update**. If **New** you will upload a new CSV file with the data and if you choose **Update** you will be updating an existing data.

Step 2 – Drag and Drop your CSV file

Click on the field, which is shown in the image,



Once you click your computer space will be opened where you can select the CSV file that should be imported in the system. Drag and drop the required file or choose the file and click on open.

Note – *The file should be in CSV format only. If you choose the file with any other format then you will be shown with an error message as shown in the image below,*

Error:

Invalid File. Please upload a File with extension csv

Step 3 – Upload

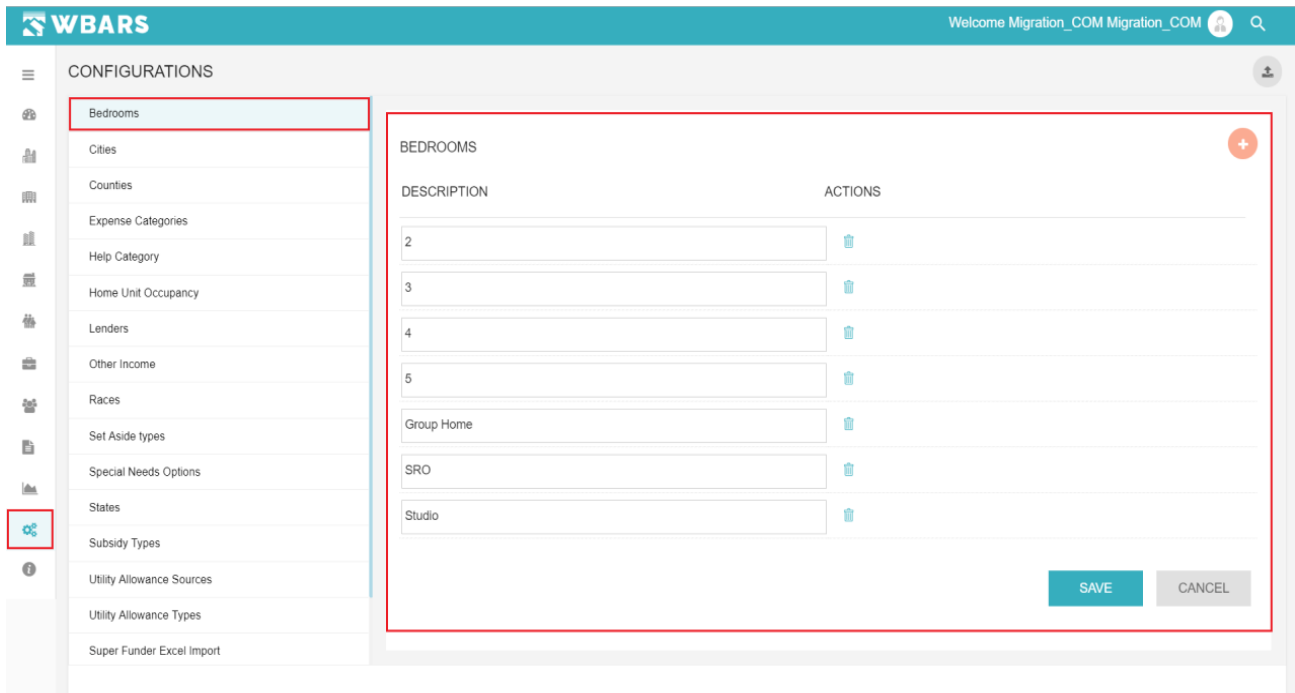


Click on upload once you have chosen the CSV file.



You can see download option provided, if you click on it the excel file named “Homebaseinsert” with all the column of the report table gets downloaded.

C3. Bedrooms




The bedroom type which the user can choose is set here. The bedroom type consists of the following categories



- 1 (Single Bedroom)
- 2 (Two Bedroom)

- 3 (Three Bedroom)
- 4 (Four Bedroom)
- 5 (Five Bedroom)
- Group Home
- SRO
- Studio

Let us see how to set the bedroom type in the WBARS system,


Step 1 – Click on “Bedrooms” under configurations where the section to add the bedroom details opens up

Step 2 – Click on  “Add” icon where the field to enter the description gets added

Step 3 – Type the requirement under “description” and click on  where the entered field gets saved or Click on  if you are don’t wish to save the entered fields.

Once clicked on save the success notification will be displayed on the top right corner as shown in the image below.



In case if you need to remove the added field under “Actions” you can see the “Delete” icon 

Click on it where the confirmation to delete the field will be requested as shown below.


Confirmation

Are you sure you want to delete this record?

YES NO

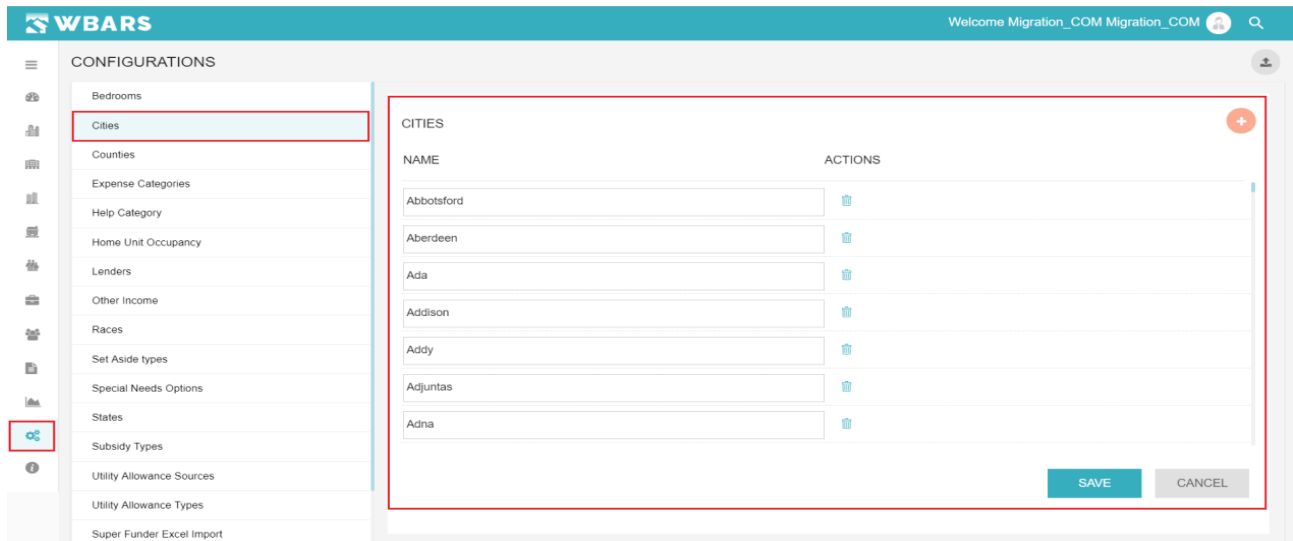
Click on “Yes” if you need to delete the record or click “No”.

There will be warning message shown as in the image below, If you proceed to save without entering the field details.

NAME	ACTIONS
<hr/> <p>this field is required</p>	


Note – You can add the next field only after saving the changes. Only one field can be added at a time.


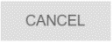
C4. Cities




All the cities shown in the WBARS system are added here where the added cities are shown in the city dropdown list. Let us see how to add the city details.

Step 1 – Click on “Cities” under configurations where the section to add the city names opens up

Step 2 – Click on  “Add” icon where the field to enter the city name gets added

Step 3 – Type the city name in the newly added field under “description” and click on  the entered field gets saved or Click on  if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon 

Click on it where the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

There will be warning message shown as in the image below if you proceed to save without entering the field details.

NAME

ACTIONS

<input type="text"/>	
----------------------	--

this field is required

Once you click on “SAVE” after entering the field then the success notification will be displayed on the top right corner as shown in the image below.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C5. Counties

All the counties shown in the WBARS system are added here where the added cities are shown in the city dropdown list. Let us see how to add the city details.

Step 1 – Click on “Counties” under configurations where the section to add counties is shown

Step 2 – Click on “Add” icon where the field to enter the county name gets added

Step 3 – Type the county name in the newly added field under “description” and click on where the county gets saved or Click on if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon

Click on it where the confirmation to delete the field will be requested as shown below.

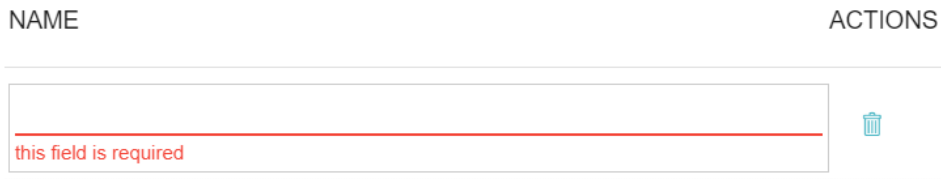
Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

There will be warning message shown as in the image below if you proceed to save without entering the field details.

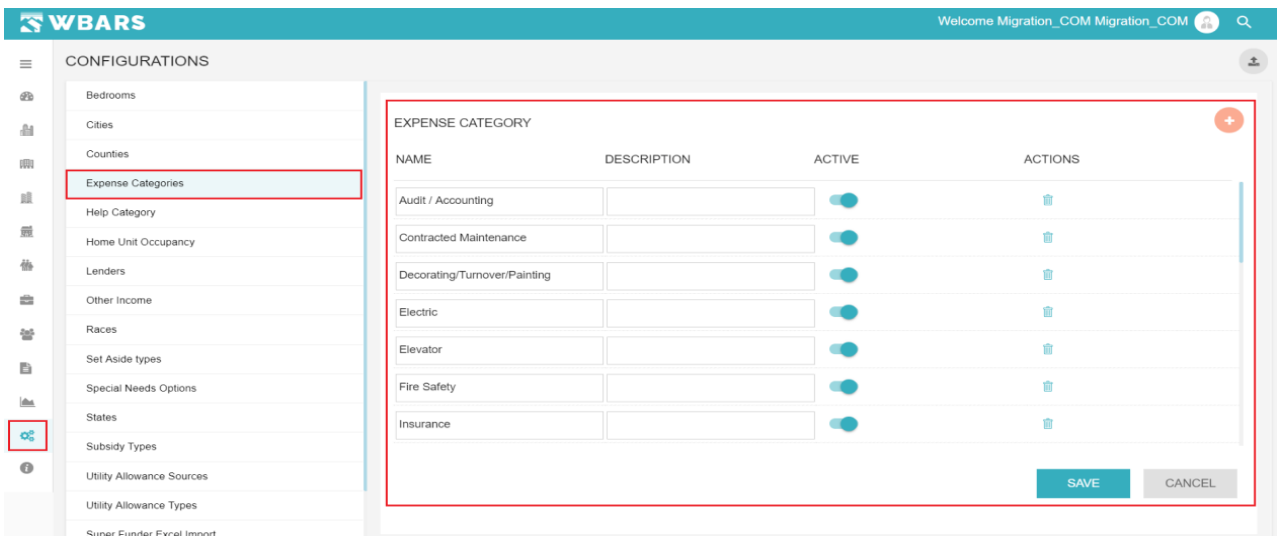


Once you click on “SAVE” after entering the field then the success notification will be displayed on the top right corner as shown in the image below.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C6. Expense Categories




The Expense Categories are added here where each expense category has the following details,


- Name (Name of the Expense). Please find the expense categories below,


Expense Category					
1	Audit / Accounting	9	Decorating/Turnover/Painting	17	Elevator
2	Contracted Maintenance	10	Electric	18	Fire Safety
3	Insurance	11	Landscaping	19	Legal Services
4	Maintenance and Janitorial	12	Marketing	20	Off Site Management
5	Oil/Gas/Other	13	On Site Management	21	Operating Reserve
6	Other	14	Pest Control	22	Real Estate Taxes
7	Replacement Reserve	15	Security	23	Telephone
8	Water & Sewer / Garbage				


- Description (Expense Description if Any)
- Status (Active / Inactive)
- Action (Delete the field), Let us see how to add the expense categories.

Step 1 – Click on “Expense Categories” under configurations where the section to add expense categories is shown

Step 2 – Click on  “Add” icon and the field to enter the expense categories

Step 3 – Type the expense name in the newly added field under “description” and click on 

where the expense category gets saved or Click on  if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon 

Click on it where the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

There will be warning message shown as in the image below if you proceed to save without entering the field details.

EXPENSE CATEGORY			
NAME	DESCRIPTION	ACTIVE	ACTIONS
<input type="text" value=""/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	

this field is required

Once you click on “SAVE” after entering the field then the success notification will be displayed on the top right corner as shown in the image below.



Status

Click on the “Status Icon” to make the expense category Active / Inactive . The status option helps you to keep the added expense category “Active / Inactive”. Instead deleting the added category, you can change the status “Inactive” where the expense isn’t seen in the reports and you can make it “Active” again if needed. You will be notified with status updates as shown above.

Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C7. Help Category


The screenshot shows the WBARS configuration interface. On the left is a sidebar menu with 'Help Category' selected. The main area displays a 'HELP CATEGORY' form with a table:



NAME	ACTIONS
<input type="text" value="Add Profile"/>	
<input type="text" value="General Search"/>	


At the bottom right of the form are 'SAVE' and 'CANCEL' buttons. A red box highlights the table and the 'SAVE' button.

For each help title added in the help section we need to choose a category and those category lists are added here. Let us see how we can add the “Help Category” below.

Step 1 – Click on “Help Category” under configurations

Step 2 – Click on  “Add” icon and the field to enter the help categories will be shown

Step 3 – Type the category name in the newly added field and click on  where the expense category gets saved or Click on  if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon 

Click on it where the confirmation to delete the field will be requested as shown below.


Confirmation


Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

There will be warning message shown as in the image below if you proceed to save without entering the field details.

HELP CATEGORY 

NAME *	ACTIONS
<input type="text"/> <small>this field is required</small>	

Once you click on “SAVE” after entering the field then the success notification will be displayed on the top right corner as shown in the image below.



The categories added here will be shown in the “**CREATE NEW HELP**” section as shown in the image below,

CREATE NEW HELP

Title * Category *

Select The Files Video Url Streaming

B *I* U `{ }`

Type Something

C8. Home Unit Occupancy

WBARS Welcome Migration_COM Migration_COM

CONFIGURATIONS

- Bedrooms
- Cities
- Counties
- Expense Categories
- Help Category
- Home Unit Occupancy**
- Lenders
- Other Income
- Races
- Set Aside types
- Special Needs Options
- States
- Subsidy Types
- Utility Allowance Sources
- Utility Allowance Types
- Super Funder Excel Import

HOME UNIT OCCUPANCY


NAME	VALUE	ACTIONS
Owner	<input type="text" value="2"/>	
Renter	<input type="text" value="1"/>	
Vacant	<input type="text" value="9"/>	



The “Home Unit Occupancy” is where you can add the current occupant title and their numbers where the added titles will be reflected in the WBARS system. The field has the following fields that needs to be filled. They are,


- Name (Current Home Unit Occupant Title)
 - Owner
 - Renter
 - Vacant are the 3 home unit occupant titles
- Value (Count of the Occupants)
- Actions (Delete the record)

The steps to add a “Home Unit Occupancy” is explained below,

Step 1 – Click on “Home Unit Occupancy” under configurations where the section to add unit occupant title and value is shown

Step 2 – Click on  “Add” icon and the field to enter the unit occupant details will be shown

Step 3 – Type the relevant details in the requested field and click on  or Click on  if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon  click on it where the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

[YES](#) [NO](#)

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

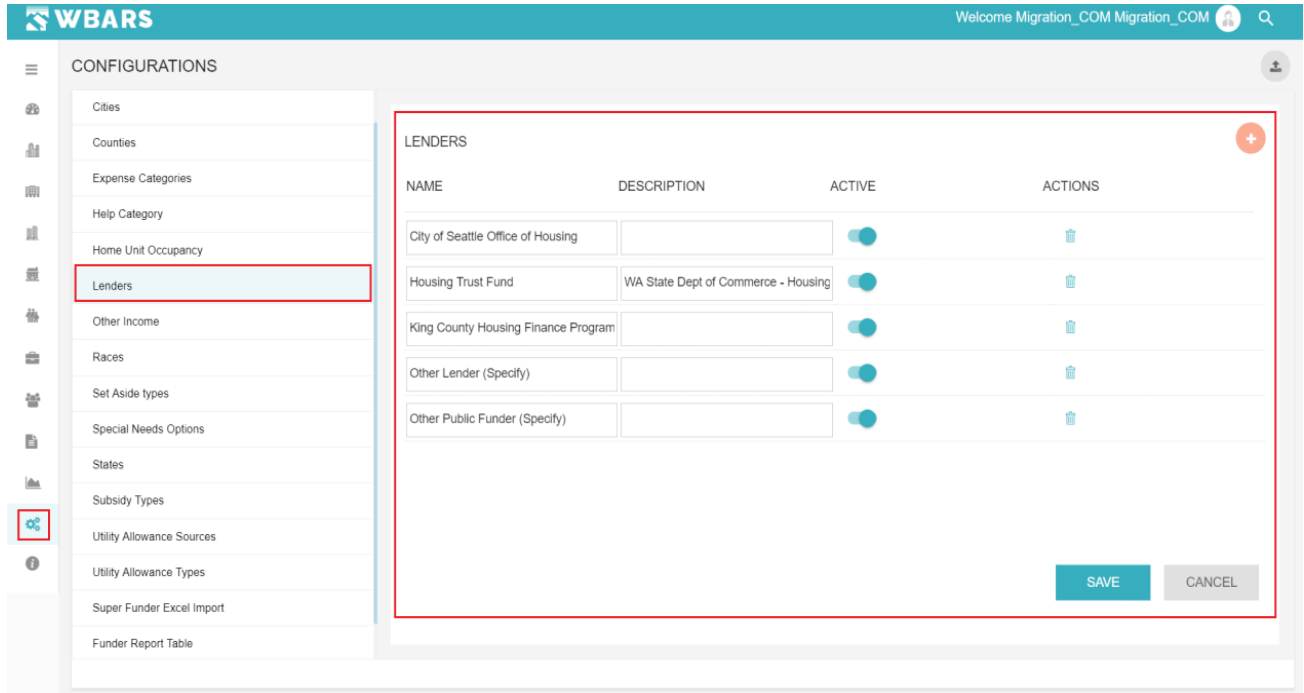
HOME UNIT OCCUPANCY		
NAME	VALUE	ACTIONS
<input type="text"/> <small>this field is required</small>	<input type="text"/> <small>this field is required</small>	

Once you click on “SAVE” after entering the mentioned fields a success notification will be displayed on the top right corner as shown in the image below.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C9. Lenders



The list of lenders in the WBARS system can be Added / Deleted and managed here. The Lender details will have the following details,

- Name (Name of the Lender / Organization)
- Description
- Status (Active / Inactive)
- Actions (Delete)

The steps to add a “Lenders” is explained below,

Step 1 – Click on “Lenders” under configurations where the section to add relevant details is shown

Step 2 – Click on “Add” icon and the field to enter the unit lender details will be shown

Step 3 – Type the relevant details in the requested field and click on to save the changes made or Click on if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon click on it where the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

LENDERS

NAME	DESCRIPTION	ACTIVE	ACTIONS
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	

this field is required

Once you click on “SAVE” after entering the mentioned fields a success notification will be displayed on the top right corner as shown in the image below.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C10. Other Income


The list of all “Other Income” categories are added here the other income field consists of



Other Income	
Agency Contribution	Fundraising/Donations
Damage	Interest Income


Laundry	NSF & Late Fees
Other Fees	Other Income
Parking	Prior Year's Rent Arrears
Screening Fees	

The steps to add a “Other Income” is explained below,

Step 1 – Click on “Other Income” under configurations where the section to add relevant details is shown

Step 2 – Click on  “Add” icon and the field to enter the details will be shown

Step 3 – Type the relevant details in the field and click on  or Click on  if you don’t wish to save the entered fields.

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon  Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation


Are you sure you want to delete this record?

[YES](#) [NO](#)

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

OTHER INCOME

NAME	ACTIONS
<input type="text"/>	

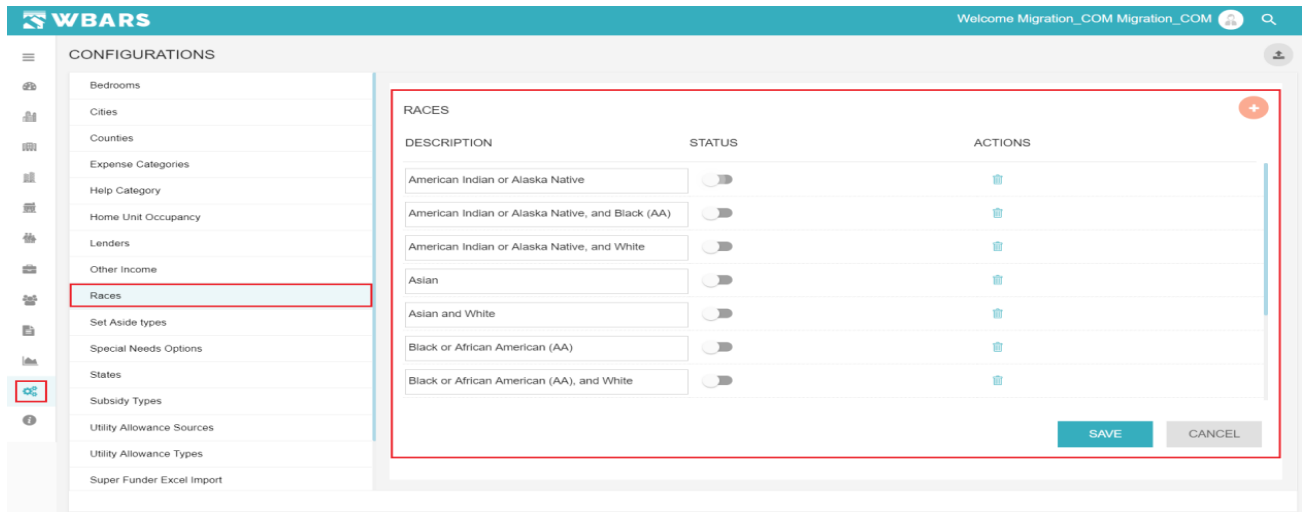
this field is required

Once you click on “SAVE” after entering the details in the mentioned field a success notification will be displayed on the top right corner as shown in the image below.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C11. Races



The “Race” categories are added here and has the following details,

- Description (Race Categories)

Races	
American Indian or Alaska Native	American Indian or Alaska Native, and Black (AA)
American Indian or Alaska Native, and White	Asian
Asian and White	Black or African American (AA)
Black or African American (AA), and White	Native Hawaiian or Other Pacific Islander
Not Disclosed	Other Multi-Racial
White	

- Status (Active / Inactive)
- Actions (Delete the record)


The steps to add a “Races” is explained below,

Step 1 – Click on “Races” under configurations where the section to add relevant details is shown

Step 2 – Click on “Add” icon and the field to enter the details is created

Step 3 – Type the relevant details in the created field and click on **SAVE** or Click on **CANCEL** if you don't wish to save the entered fields.

Step 4 – The status of the newly added record will be Active by default and you can change the status to inactive by clicking on it

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon  Click on it and the confirmation to delete the field will be requested as shown below.


Confirmation

Are you sure you want to delete this record?

YES **NO**

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

RACES		
DESCRIPTION	STATUS	ACTIONS
<input type="text"/> <small>this field is required</small>	<input type="checkbox"/>	

Once you click on “SAVE” after entering the details in the mentioned field a success notification will be displayed on the top right corner as shown in the image below. The success notification will be shown for status updates as well.



Note – You can add the next field only after saving the changes. Only one field can be added at a time.

C12. Set Aside Types

The “Set Aside Types” has the following details,

- Name (Set Aside Type Names)


Set Aside Types			
1	Percentage 30% - 80%	18	At Risk Homelessness
2	Chronic Mental Illness	19	Developmentally Disabled
3	Disabled	20	Domestic Violence Survivors
4	Elderly	21	Elderly
5	Families with Children	22	Farmworker
6	Farmworker	23	Farmworker – Seasonal
7	Frail Elderly	24	General
8	HOME Program - City	25	HOME Program – County
9	HOME Program - State	26	Homeless
10	Homeless Family Head of Household Served	27	Homeless Individual Head of Household Served
11	Large Household	28	Mentally Ill / Chemically Addicted
12	Multiple Special Needs	29	NHTF Program – City
13	NHTF Program - County	30	NHTF Program – State
14	People Living with HIV/AIDS	31	Physically Challenged



15	Substance Abusers / In Recovery	32	Transitional
16	Traumatic Brain Injury	33	Veterans
17	Young Adult 18-24	34	Youth <18


- Description
- Category
 - Home Program
 - LIH Percentage
 - Special Needs Population
 - Special Needs Population - Homeless
 - Tax credits Special Needs
- Percentage (%)
- Actions (Delete)

The steps to add a “Set Aside Types” is explained below,

Step 1 – Click on “Set Aside Types” under configurations where the section to add relevant details is shown

Step 2 – Click on  “Add” icon and the field to enter the details is created

Step 3 – Type the Name, Description and choose the suitable category from the dropdown list and enter the valid percentage (if LIH Percentage chosen as category) and click on  or if you don’t want to save then click on 

In case if you need to remove the added field, under “Actions” you can see the “Delete” icon  Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

SET ASIDE TYPES

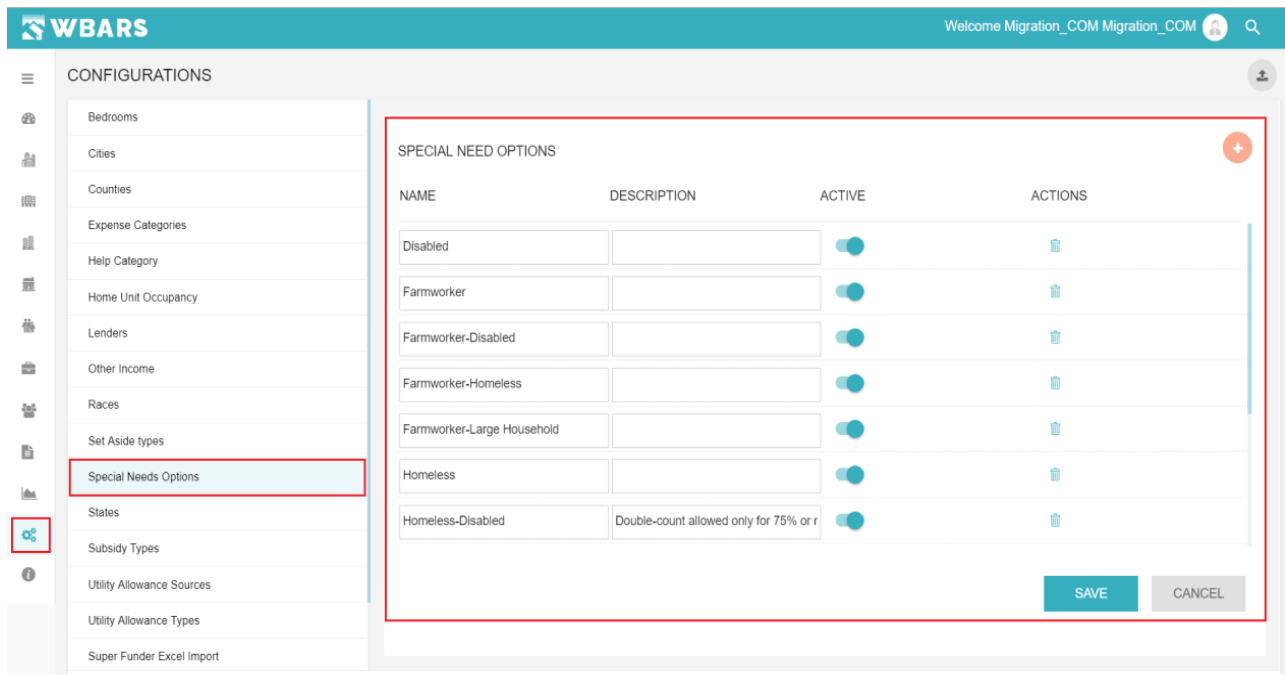
NAME	DESCRIPTION	CATEGORY	%	ACTIONS
<input type="text" value="this field is required"/>	<input type="text"/>	<input type="text" value="this field is required"/>	<input type="text"/>	

Once you click on “SAVE” after entering the details in the mentioned field a success notification will be displayed on the top right corner as shown in the image below. Clicking on “X” closes the notification shown



Note – You can add the next field only after saving the changes. Only one field can be added at a time.


C13. Special Needs Options





You can add the special needs options here in this field. The types of special need options are shown below,

1. Disabled	2. Farmworker	3. Farmworker – Disabled
4. Farmworker - Homeless	5. Farmworker – Large Household	6. Homeless

7. Homeless – Disabled	8. Homeless – Large Household	9. Large Household
10. Transitional – Disabled	11. Transitional – Disabled	12. Transitional – Large Household



The special needs option shown in the WBAR system is added here. To add a special need option click on the  Add button and the field requesting the following details will be shown as in the image below,



SPECIAL NEED OPTIONS 


NAME *	DESCRIPTION	STATUS	ACTIONS
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

C13.1 Name – Enter the name of the Special need which you will add

C13.2 Description – Mention the description if there are any which you would like to mention about the especial need which you add

C13.3 Status – The status icon  will be shown only after you **SAVE** the created special need. you can change the status to inactive  by clicking on it

C13.4 Save / Cancel - click on  once you have entered the above fields or if you don't want to save then click on .

C13.5 Actions - In case if you need to remove the added field, under “Actions” you can see the “Delete” icon  Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

SPECIAL NEED OPTIONS +

NAME *	DESCRIPTION	STATUS	ACTIONS
<input type="text" value=""/>	<input type="text" value=""/>		

C14. States

The screenshot shows the 'CONFIGURATIONS' page in WBARS. On the left sidebar, 'States' is highlighted. The main content area shows a table for 'STATES' with the following data:

ABBREVIATION	NAME	ACTIONS
AL	Alabama	
AK	Alaska	
AB	Alberta	
AZ	Arizona	
AR	Arkansas	
BC	British Columbia	
CA	California	

At the bottom right of the table are 'SAVE' and 'CANCEL' buttons.

All the state names in the WBAR system is added here. You can add the state name by clicking the Add button + and the field requesting the following details will be shown as in the image below,

STATES +

ABBREVIATION *	NAME *	ACTIONS
<input type="text" value=""/>	<input type="text" value=""/>	

C14.1 Abbreviation – The State name abbreviation is added here. Ex. It is AL for Alabama

C14.2 Name – The name of the state is entered here in this field.

C14.3 Save / Cancel - click on SAVE once you have entered the above fields or if you don't want to save then click on CANCEL.

C14.4 Actions - In case if you need to remove the added field, under “**Actions**” you can see the “**Delete**” icon Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “Yes” if you need to delete the record or click “No”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

STATES



ABBREVIATION *

NAME *

ACTIONS

<input type="text"/>	<input type="text"/>	
this field is required	this field is required	

C15. Subsidy Types

CONFIGURATIONS

- Bedrooms
- Cities
- Counties
- Expense Categories
- Help Category
- Home Unit Occupancy
- Lenders
- Other Income
- Races
- Set Aside types
- Special Needs Options
- States
- Subsidy Types**
- Utility Allowance Sources
- Utility Allowance Types
- Super Funder Excel Import

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SUBSIDY TYPES

NAME	SHORT NAME	DESCRIPTION	CATEGORY NAME	ACTIVE	ACTIONS
Alcohol Drug Abuse Trea	ADATSA		Operational Subsidy	<input checked="" type="checkbox"/>	
City General Fund	CGF		Operational Subsidy	<input checked="" type="checkbox"/>	
County 2163 document n	2163 Funds	Pierce County	Operational Subsidy	<input checked="" type="checkbox"/>	
Emergency Shelter Assis	ESAP		Operational Subsidy	<input checked="" type="checkbox"/>	
HOME-TBRA	HOME-TBRA		Rental Subsidy	<input checked="" type="checkbox"/>	
HUD Section 8 - Agency	Sec 8	Agency Based	Operational Subsidy	<input checked="" type="checkbox"/>	
HUD Section 8 - Agency	Sec 8	Agency Based	Rental Subsidy	<input checked="" type="checkbox"/>	

SAVE CANCEL

All the subsidy types in the WBAR system is added here. You can add the subsidy type by clicking the Add button and the field requesting the following details will be shown as in the image below,

SUBSIDY TYPES



NAME *	SHORT NAME *	DESCRIPTION	CATEGORY NAME *	STATUS	ACTIONS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

C15.1 Name – The name of the subsidy type is entered here in this field

C15.2 Short Name – You will enter the short name of the subsidy type here **Ex.** If the Name is “City General Fund” the short name is “CGF”

C15.3 Description – Mention the description if there are any which you would like to mention about the especial need which you add


C15.4 Category Name – There are 2 types of subsidy types available and the option to choose one is shown in the category name. They are,

- Operational Subsidy
- Rental Subsidy

You can click on the field and choose one from the shown category

C15.5 Save / Cancel - click on once you have entered the above fields or if you don't want to save then click on .

C15.6 Status – The status icon will be shown only after you **SAVE** the created special need. you can change the status to inactive by clicking on it

C15.7 Actions - In case if you need to remove the added field, under “**Actions**” you can see the “**Delete**” icon  Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “**Yes**” if you need to delete the record or click “**No**”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

SUBSIDY TYPES



NAME *	SHORT NAME *	DESCRIPTION	CATEGORY NAME *	STATUS	ACTIONS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

C16. Utility Allowance Sources

All the utility allowance sources in the WBAR system is added here. You can add the UA by clicking the Add button and the field requesting the following details will be shown as in the image below,

UTILITY ALLOWANCE SOURCE

NAME *	ACTIONS
<input type="text"/>	

C16.1 Name – The name of the UA source is entered here in this field

C16.2 Save / Cancel - click on once you have entered the above fields or if you don't want to save then click on .

C16.3 Actions - In case if you need to remove the added field, under “**Actions**” you can see the “**Delete**” icon Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “**Yes**” if you need to delete the record or click “**No**”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

UTILITY ALLOWANCE SOURCE +

NAME *	ACTIONS
<div style="border: 1px solid red; padding: 2px;">this field is required</div>	

C17. Utility Allowance Types

The screenshot displays the 'UTILITY ALLOWANCE TYPES' configuration page. On the left, a sidebar lists various configuration categories, with 'Utility Allowance Types' highlighted. The main content area shows a table with columns for 'NAME' and 'ACTIONS'. The table lists seven utility allowance types: Electric, Garbage, Gas, Oil, Other, Sewer, and Water. Each row includes a trash icon for deletion. A red box highlights the entire configuration area. At the bottom right, there are 'SAVE' and 'CANCEL' buttons. The top navigation bar shows the WBARS logo and the user's name 'Welcome Migration_COM Migration_COM'.

All the utility allowance types in the WBAR system is added here. You can add the UA types by clicking the Add button and the field requesting the following details will be shown as in the image below,

UTILITY ALLOWANCE TYPES



NAME *

ACTIONS

NAME *	ACTIONS
<input type="text"/>	

C17.1 Name – The name of the UA type is entered here in this field

C17.2 Save / Cancel - click on once you have entered the above fields or if you don't want to save then click on .

C17.3 Actions - In case if you need to remove the added field, under “**Actions**” you can see the “**Delete**” icon Click on it and the confirmation to delete the field will be requested as shown below.

Confirmation

Are you sure you want to delete this record?

YES NO

Click on “**Yes**” if you need to delete the record or click “**No**”.

A warning message will be shown as in the image below if you proceed to / Click on save without entering the field details.

UTILITY ALLOWANCE TYPES

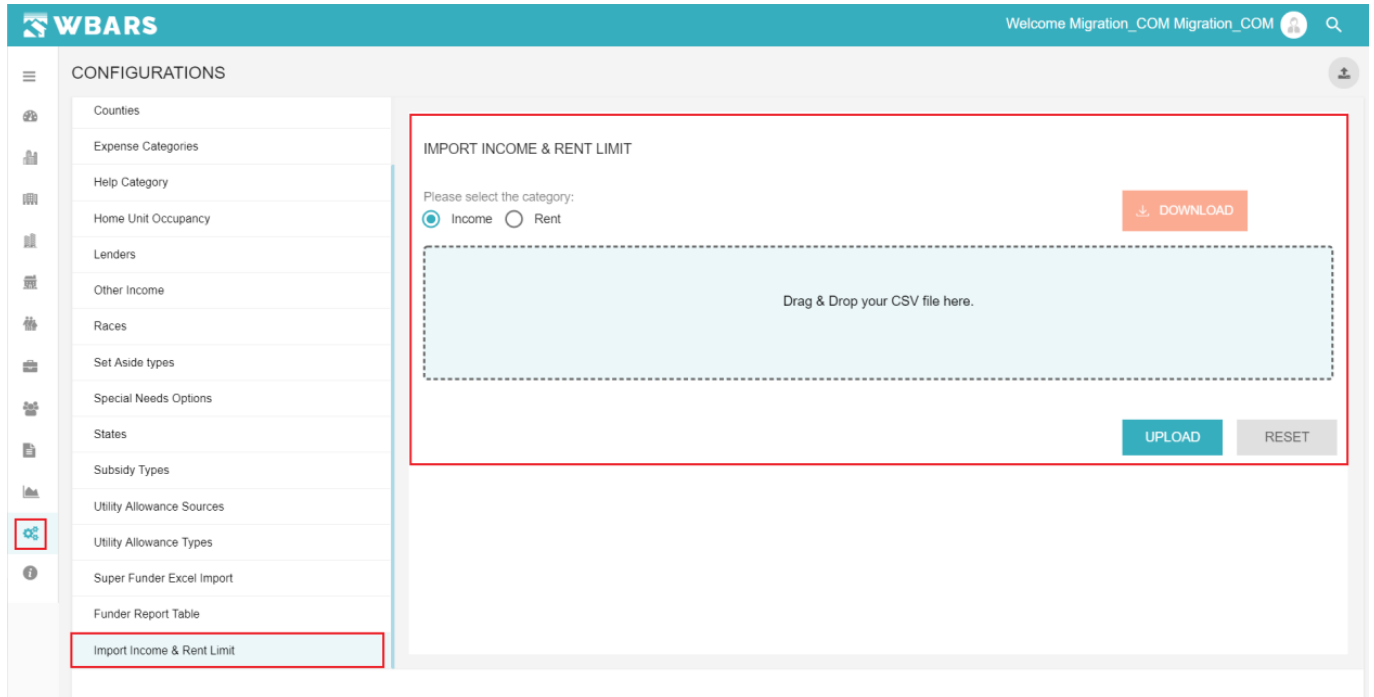


NAME *

ACTIONS

NAME *	ACTIONS
<input type="text"/> <small>this field is required</small>	

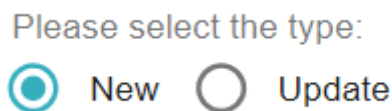
C18. Import Income and Rent Limit



The income and rent limit can be imported here as new or you can update the existing data.

Step 1 – Please select the type.

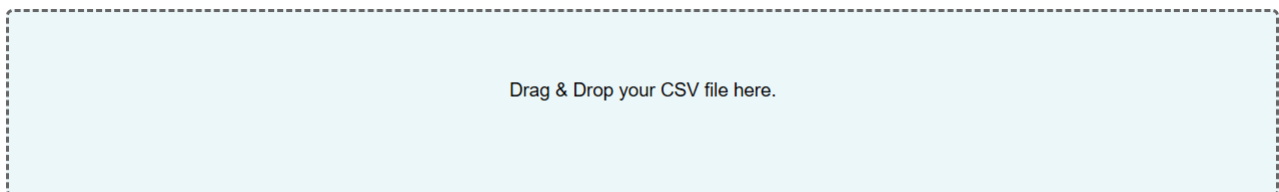
You will be provided with two options as shown in the image below,



You will select the required type by clicking the radio button **New** or **Update**. If **New** you will upload a new CSV file with the data and if you choose **Update** you will be updating an existing data.

Step 2 – Drag and Drop your CSV file

Click on the field, which is shown in the image,



Once you click your computer space will be opened where you can select the CSV file that should be imported in the system. Drag and drop the required file or choose the file and click on open.

Note – *The file should be in CSV format only. If you choose the file with any other format then you will be shown with an error message as shown in the image below,*

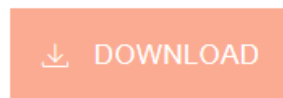
Error:

Invalid File. Please upload a File with extension csv

Step 3 – Upload / Reset




Click on upload once you have chosen the CSV file or click reset to exit the process and reset.



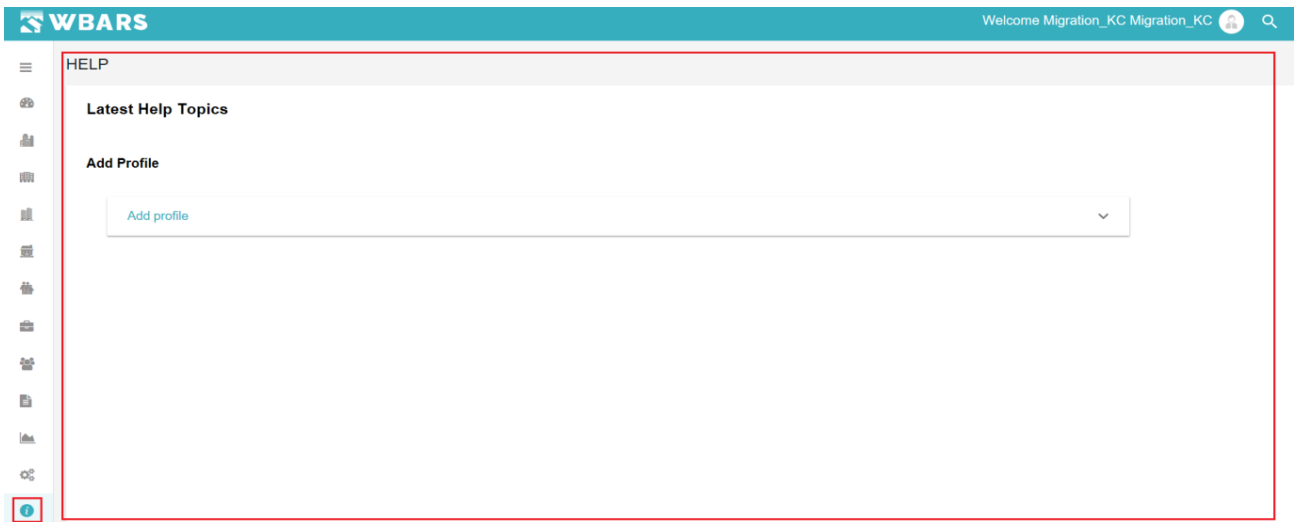
You can see download option provided, if you click on it the excel file named “Homebaseinsert” with all the column of the report table gets downloaded.

Help

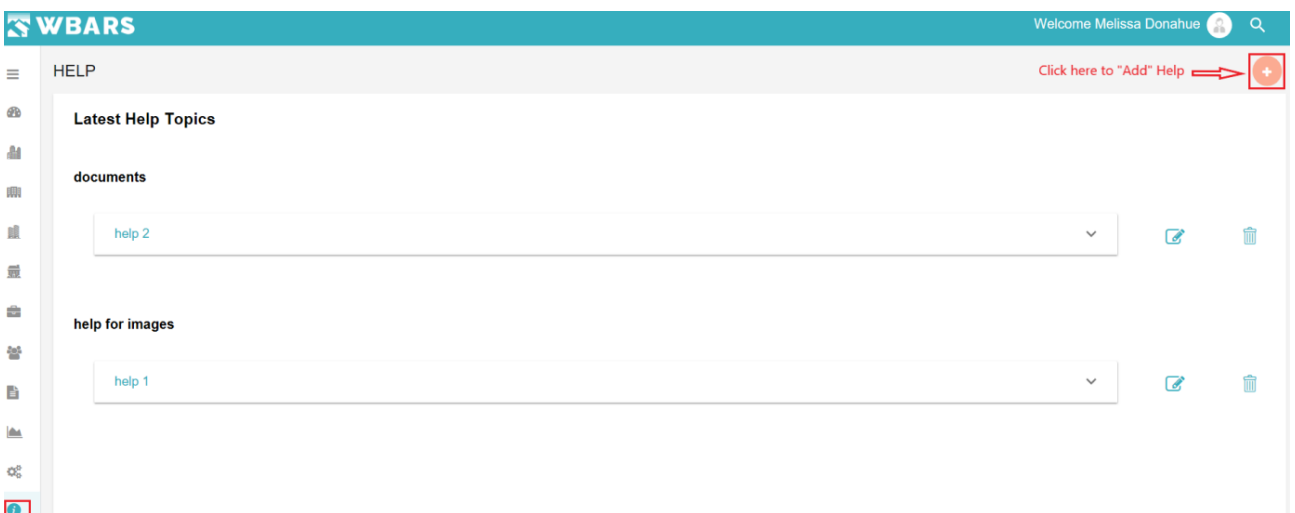
The “**Help**” section has the information on how the application can be accessed. In case if you have any clarifications, you can use the “**Help**” option which will provide you the knowledge by means of tutorials, videos, or FAQ which will help you to navigate through the application.

This is the “**Help**” icon  and it is located at the bottom of the menu bar as shown in the Image below,

Contractor / Manager



Funder



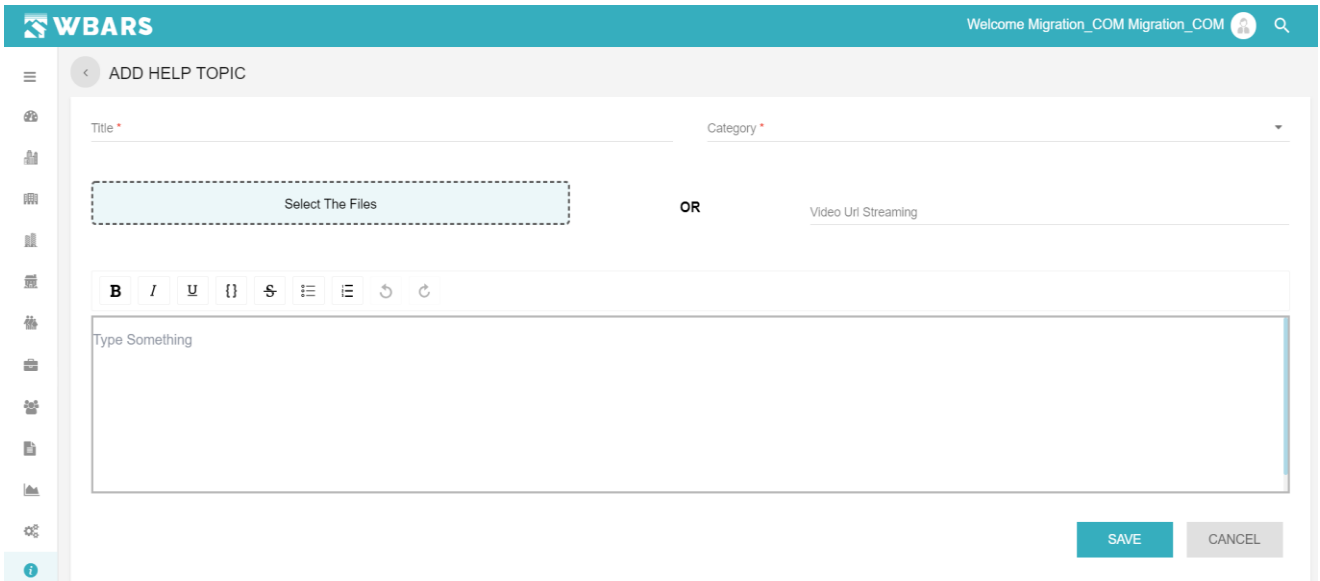
The Funder will have the access to Edit and delete the help section created.

H1. Add Help

The Admin / Funder can add the help section for the modules or options which can be viewed by the other users of the WBARS. Let’s see how to add help below,

Step 1 – Click on “Add Button”

Step 2 – The page to enter the help details will be opened. Please find the screen of the page below,



“ADD HELP TOPIC” is the page name and you can enter the relevant details in the fields mentioned in the page. Lets us see the fields and what needs to be

H1.1 Title



You can enter the title of the help section where it will be shown as a listing in the help page where the user can click on the title and access it. If you proceed to click on “SAVE” without entering the details a warning message will be shown as in the image below,



Condition

- Admin only access
- (*) Mandatory Field and the field can't be saved without entering the required details

H1.2 Category



The category is a dropdown selection field where you can click on the field and the list of options will be shown as a dropdown from which you can choose the required one. If you proceed to click on “SAVE” without entering the details a warning message will be shown as in the image below,

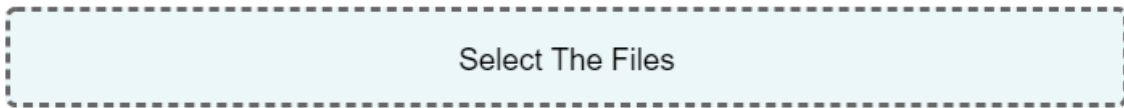


[Click here](#) to know where you can add categories.

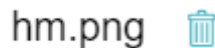
Condition


- Admin only access
- (*) Mandatory Field and the field can't be saved without entering the required details

H1.3 Select the Files



In you need to add any files from your computer click on “Select The Files” where the computer file browse opens up from which you can select the required file and click on “Open” which will add the file to the help topic that is created. Once the file is added the file will be displayed as shown in the image below.



If you want to remove the selected file, click on the  “Delete / Remove” icon where a dialog box requesting the delete confirmation will be shown as in the image below,

Confirmation

Are you sure you want to remove this attachment?

YES NO

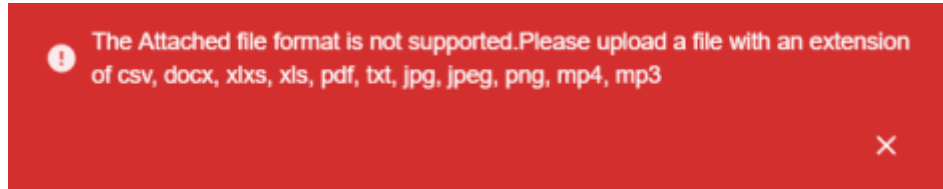
If you are sure removing the attachment click “YES” else, Click “NO”.

Condition

- “Select The Files” or “Video URL Streaming” can be added. Both can't be added at the same time.
- Non mandatory field where the help section can be saved without updating or editing this fields

- Only the supported file formats can be chosen. The supported file formats are CSV, docx, xlsx, xls, pdf, txt, jpg, jpeg, png, mp4, mp3.

If unsupported formats are uploaded a warning message will be shown as of in the image below,



H1.4 Video URL Streaming

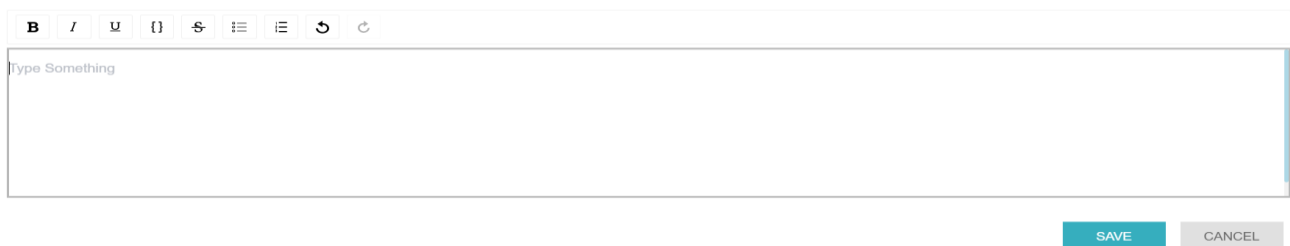
Video Url Streaming

The video links / URL can be pasted here where the user can click on the link to view the video.

Condition

- “Select the Files” or “Video URL Streaming” can be added. Both can’t be added at the same time.
- Non mandatory field where the help section can be saved without updating or editing this fields

H1.5 Description

A screenshot of a rich text editor. At the top is a toolbar with icons for Bold (B), Italic (I), Underline (U), Text Color (A), Background Color (A), Bulleted List (List), Numbered List (List), Undo (↶), and Redo (↷). Below the toolbar is a large text input area with the placeholder text "Type Something". At the bottom right of the input area are two buttons: "SAVE" (teal) and "CANCEL" (grey).

The description for the help page is provided here where you can enter the text explaining the section which you have added is explained here. You can make the text Bold, Italic, Underlined and provide braces and bullet point the text input. You can undo and redo the text typed.


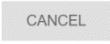
Condition

- Non mandatory field where the help section can be saved without updating or editing this fields

Save / Cancel

SAVE

CANCEL

You can click on  after providing all the required fields where the changes made will get saved in the system. If you wish to leave the page without saving you can click on .