WBARS 3.0 Q&A Support session
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85 Participants

Summary of Questions and Answers:

Q: How do I delete a resident?
A: You cannot delete a record, but you can "archive" it, which means removing it from Table 1 and storing it in the archive area. On the household record you want removed, click Edit then choose Archive. The household record will then be removed from the unit. Once the unit is vacant, you can create a new household record. If you want to bring an archived record back to Table 1, access the Archive function by clicking the Settings icon in the top right corner of the screen. In Archive, you can retrieve the old record.

Q: Can there be more than one contact in the Owner Contact field?
A: Yes, up to three (3) staff can be assigned in the Owner Contact field. Please contact your Funder if the ownership organization or owner contacts need to be updated.

Q: Why am I seeing recertification warning messages in Table 1 when the effective date is still several months away?
A: The recertification warning messages are there to remind users that they must process recertifications for their residents during the year. The warning message goes away on each record once a user processes the annual recertification for that household and updates the current Certification date field. Once that change is saved, the warning goes away.

Q: How do I add or remove a contact in PM or OM contact fields?
A: Open a project record; one of the tabs is called Sites, click on the Sites tab.
On the Sites page, click the name of the Site you want to edit. On the individual Site page, click the PM & OM Contacts tab. On this tab, click Edit to add or delete contacts for the Property Manager contact field and/or the Onsite Manager contact field.

Q: Help! I can't edit Table 1. The report is in the correct year, is at my level, and I am associated as the Property Manager contact for the property. What is happening?
A: It could be that you have more than one contact record in WBARS and have assigned one contact to the project but logged in under another contact record. If you can't edit your reports, check these items before contacting your Funder for help:

1. Are you assigned as either the Property Manager or Onsite Manager contact for the property? Check the PM&OM Contacts tab in the project record per above.
2. Are you trying to edit the **current** year reports or are you trying to edit in a previously submitted report year?

3. Check your reports list by clicking the Report Submissions button at the top of the page – is the report at your level, or is it at a higher or lower level in the submission process?

If you are an assigned PM or OM for the project, you are trying to edit the current year and the reports are at your level, but you still can't edit the reports, contact your Funder for assistance.

Q: How do I figure out what level in the submission chain my reports are at?
A: Click the Report Submissions button at the top of the screen. On the reports list page, you can see the list of your projects, and for every Table, a color-coded status will show you what level each report is at. Make sure that you specify the correct year by editing the Year field in the top right part of the page. If you see the status "Not Started", that means that the report is at the lowest level your organization has specified for the property – either Onsite Manager or Property Manager – and the person at that level has not yet submitted the report to the next level. It doesn't matter if you are actively editing a report, the "Not Started" status will not go away until the report is submitted up to the next level in the chain.

Q: Could we add some additional data points (e.g., unit number, household name) to the error log for Excel file imports so that it's easier to identify the record that needs to be fixed? Right now error log just shows a row number.
A: Yes, we will create a ticket to get some additional data points added to the error log for Excel imports so it's easier to identify the records needing corrections.