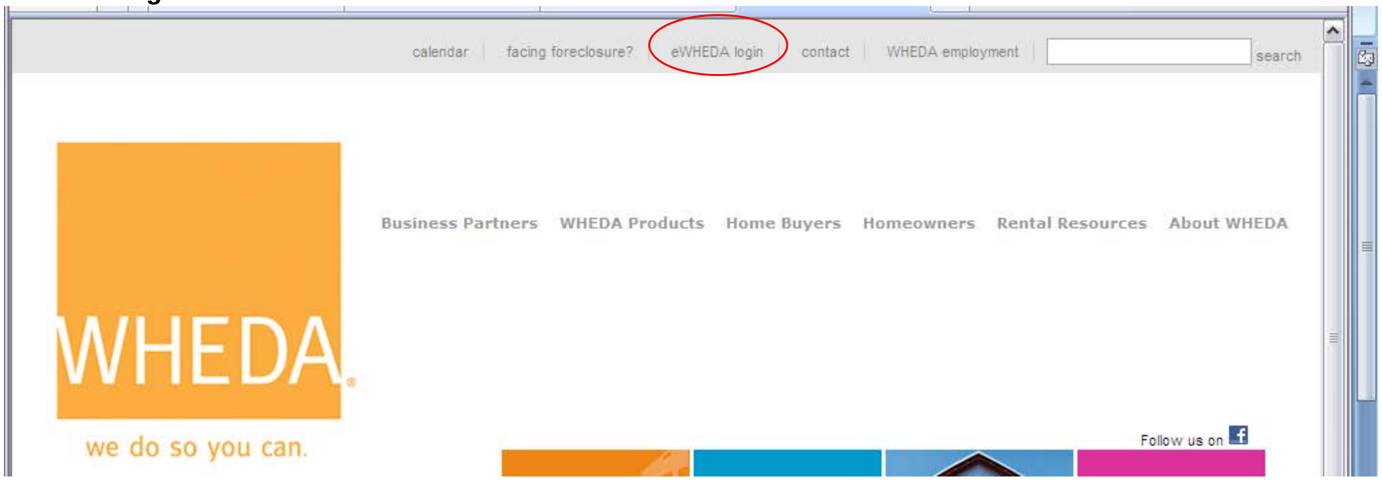
Instructions for eWHEDA's Form 500 Web Application

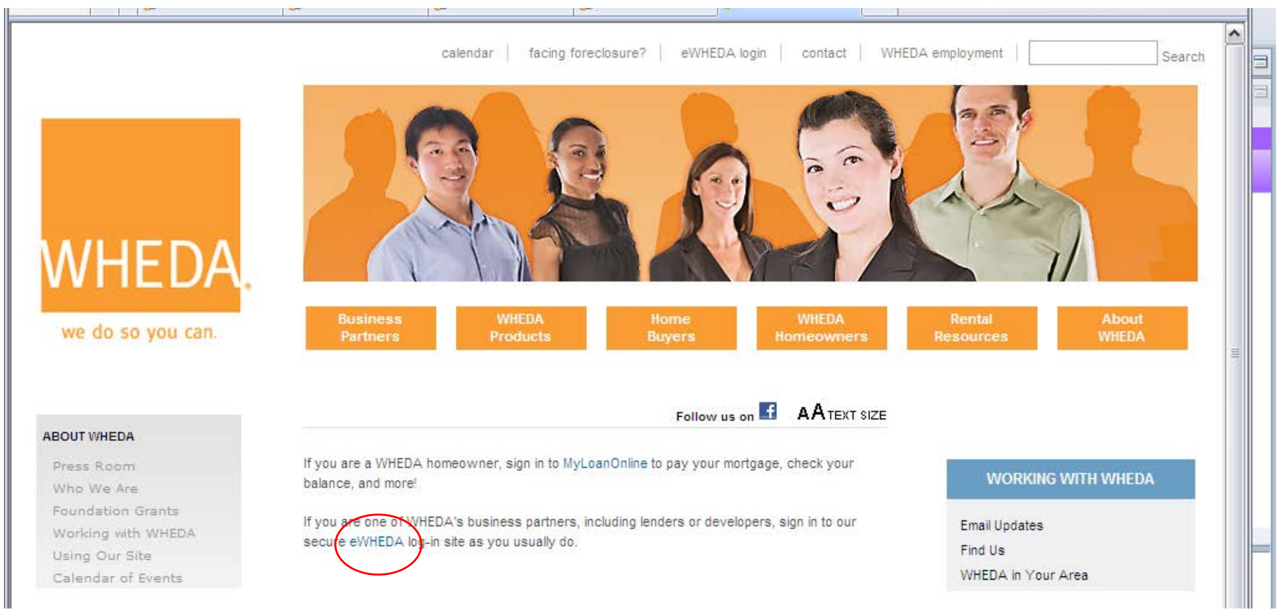
Contents

Accessing the System

1. Access the Internet through your Internet Service Provider (ISP).
2. Enter wheda.com in the **Address** line of your browser. The link to eWHEDA applications can be found on the top menu bar and is labeled **“eWheda login”.**

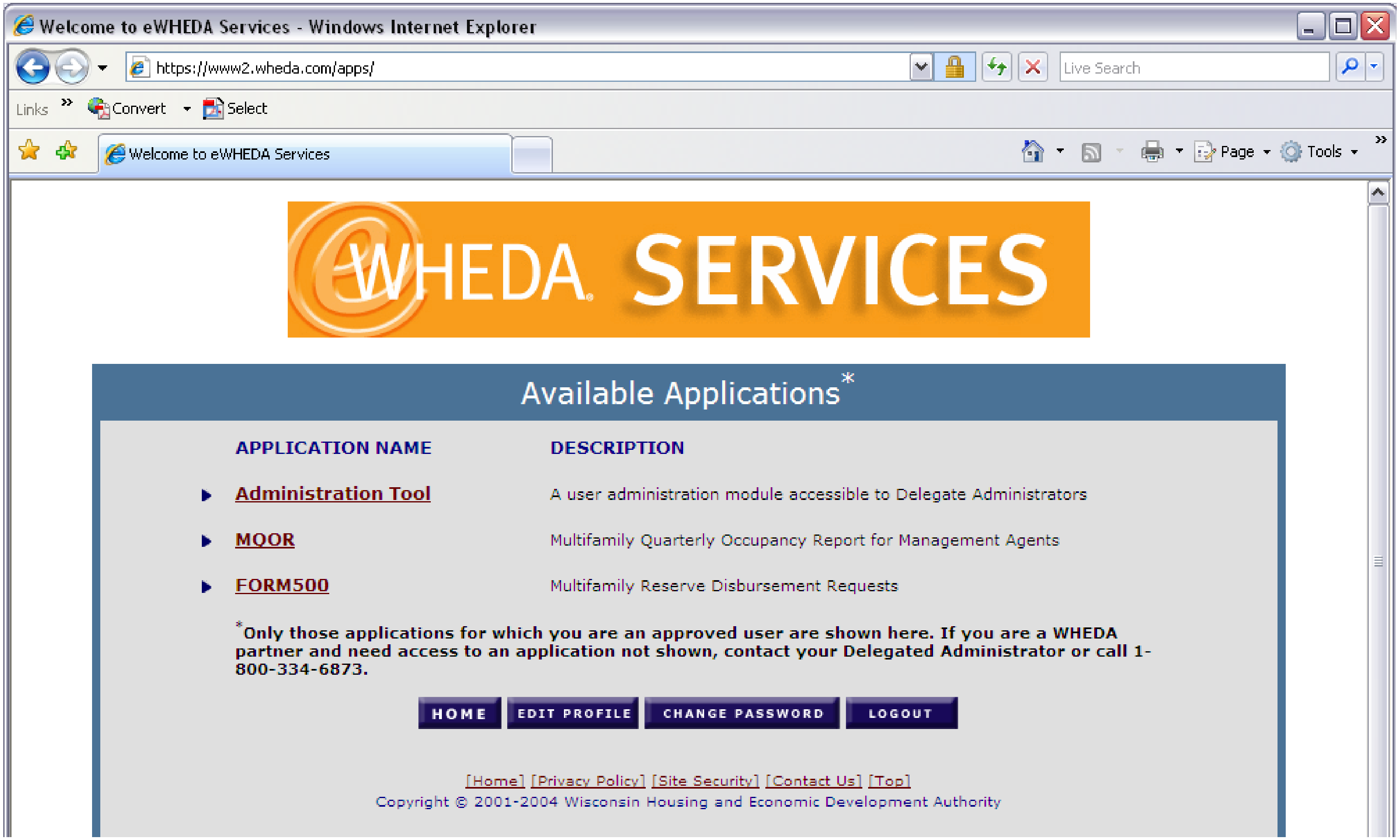


3. Then click on the blue **eWHEDA** in the second paragraph of this page.



4. Login with your user name and password. Your password is case sensitive. If you do not have a user name and password, click on the blue hyperlink **How to Sign Up for Our eWHEDA Services** to obtain one.

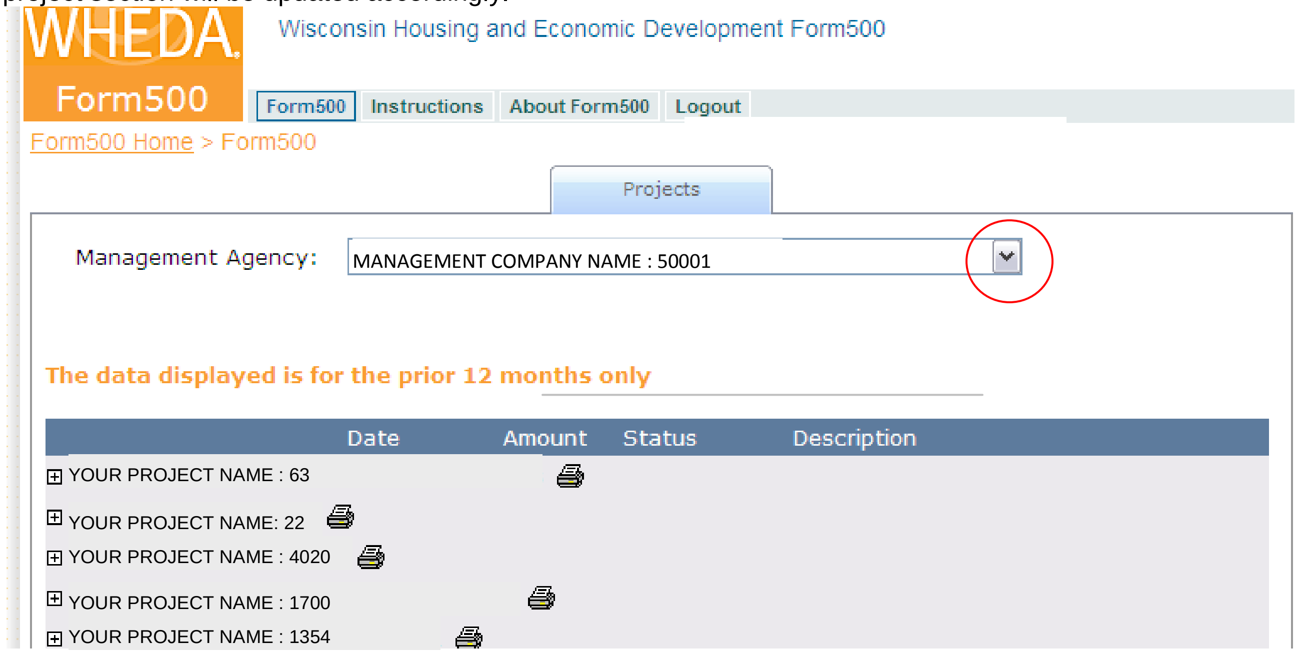
5. Once logged in, you will see the **Available Applications** screen. It will look similar to the screen below.



6. Click on **Form500** from the **Available Applications** menu.

Viewing Your Projects

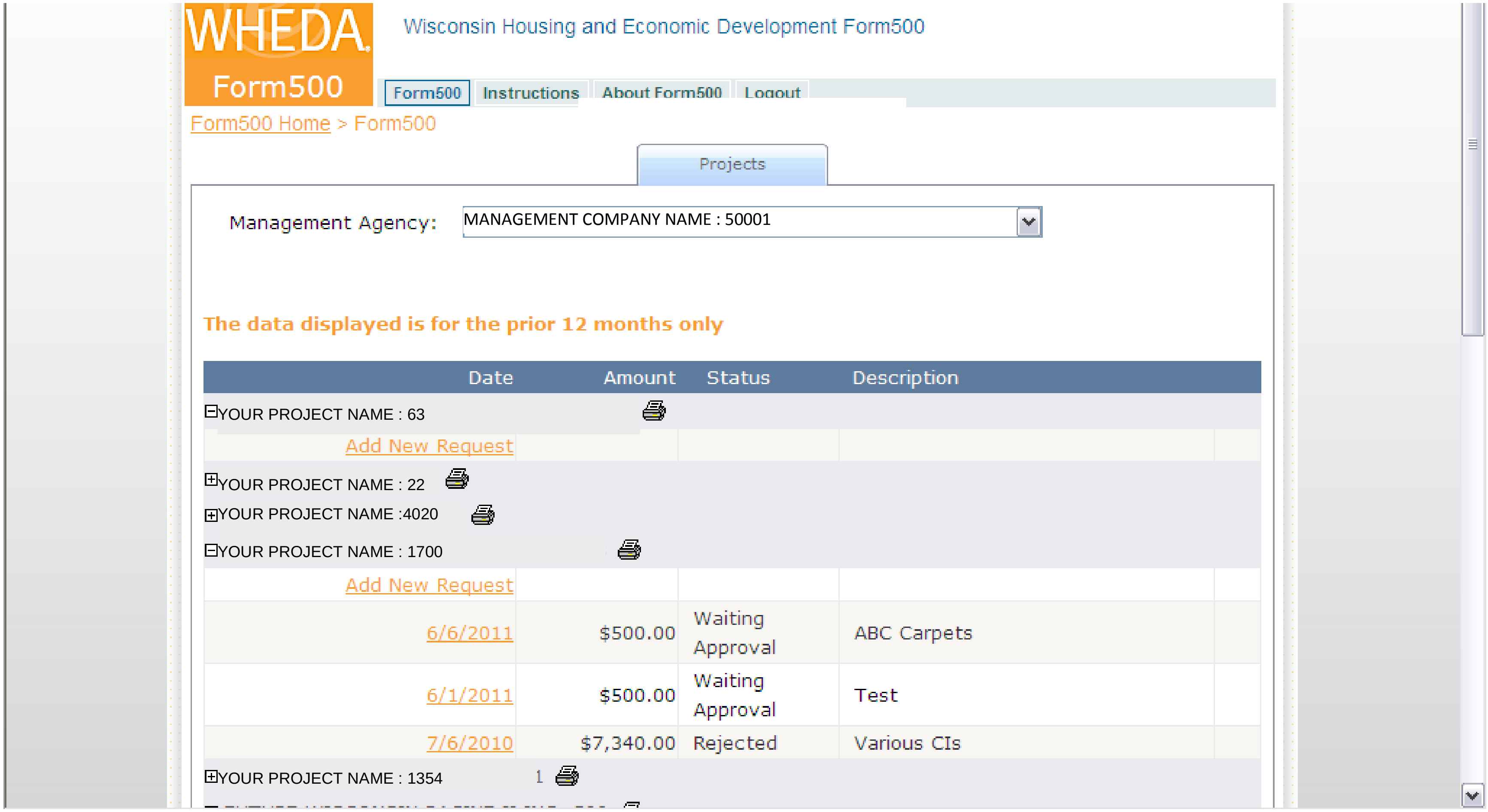
After logging in and selecting Form 500 from the list of available applications, all projects that you have access to will be displayed. If you have access to more than one management agency, click the drop down arrow and select the appropriate management agency. The project section will be updated accordingly.



Viewing Project Details

Click on the **+** sign next to the project name you want to view or submit a request for that project. Click the **–** to compressed the details.

The page will then look similar to this:

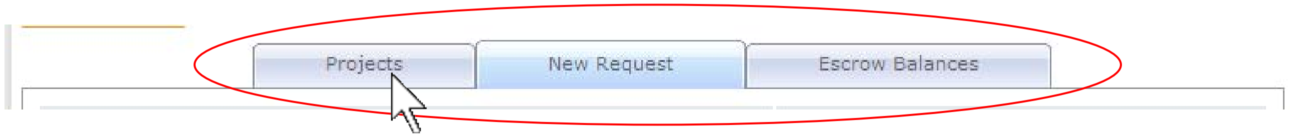


Summary of Disbursements

A summary of disbursements requested in the prior 12 months will be displayed. Click on the orange date hyperlink to view the details of that disbursement.

Navigating the Application

As you use the system, various tabs are displayed. Clicking links will move you from tab to tab. The activated tab will be highlighted in light blue. The inactivated tab(s) will be highlighted in light gray. To return to a previous tab, do not click the back button on your browser. Instead, click on the tab you wish to return to.

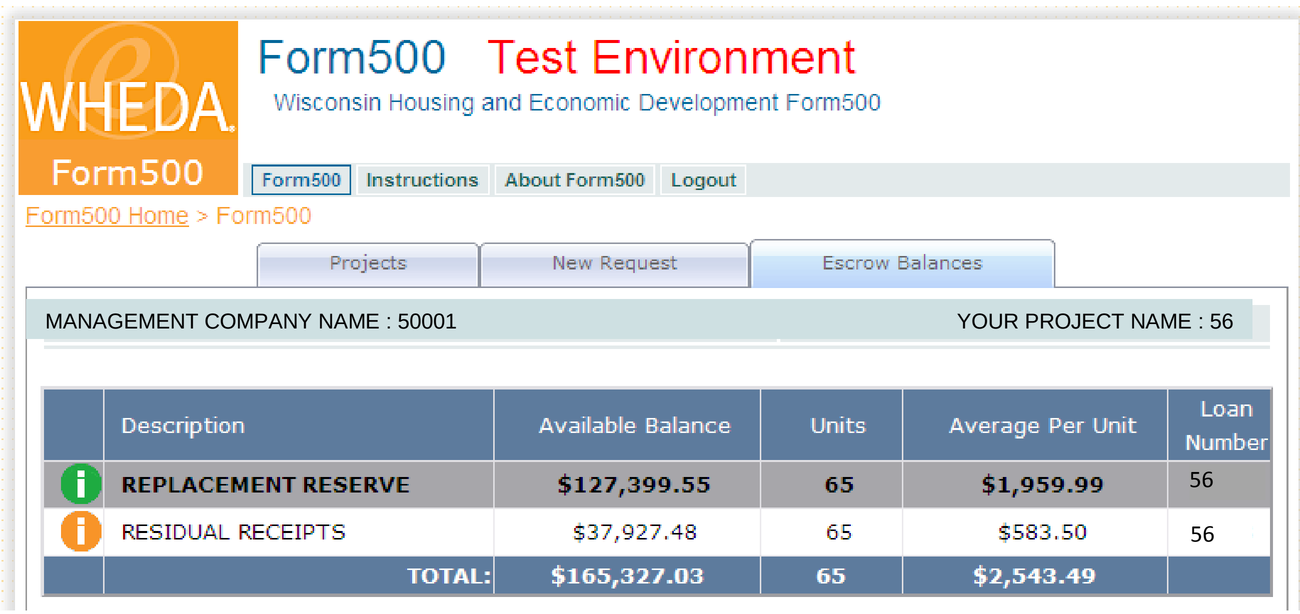


Project is not Eligible for Disbursements

If the orange hyperlink says, Project is not eligible for disbursements at this time, it may mean that your escrow balances have fallen below the recommended level of $1,500 per unit or your asset manager has put your escrow accounts on hold. If you believe this to be an error, please contact your asset manager.

Viewing Escrow Balances

To see the status of your escrows, click on the orange hyperlink Project is not eligible for disbursements at this time or Add a new request.



	Description	Available Balance	Units	Average Per Unit	Loan Number
	REPLACEMENT RESERVE	**$127,399.55**	**65**	**$1,959.99**	56
	RESIDUAL RECEIPTS	$37,927.48	65	$583.50	56
	TOTAL:	**$165,327.03**	**65**	**$2,543.49**	

There are two information icons used on the **Escrow Balances** tab. They are a and a .

The orange icon indicates that an escrow is on hold. If you hover your mouse pointer over the icon, a message will display. “Escrow is on hold. Preapproval Required.”

The green icon indicates that this is the escrow account your asset manager has determined is the primary escrow account. If your project is eligible to submit disbursements without a preapproval, this is the escrow account that will be used (screen shot below). If you hover your mouse pointer over the icon, a message will display. “Unless otherwise determined by a preapproval, all disbursements will use this escrow account if the escrow meets eligibility requirements.”

Projects | New Request | Escrow Balances

MANAGEMENT COMPANY NAME : 50001 YOUR PROJECT NAME : 27

	Description	Available Balance	Units	Average Per Unit	Loan Number
i	**REPLACEMENT RESERVE**	**$47,787.83**	**55**	**$868.87**	27
	RESIDUAL RECEIPTS	$42,631.33	55	$775.12	27
	TOTAL:	**$90,419.16**	**55**	**$1,643.98**	

Project is Eligible for an Online Request

If the orange hyperlink says, Add a new request, you may add a request through this application.

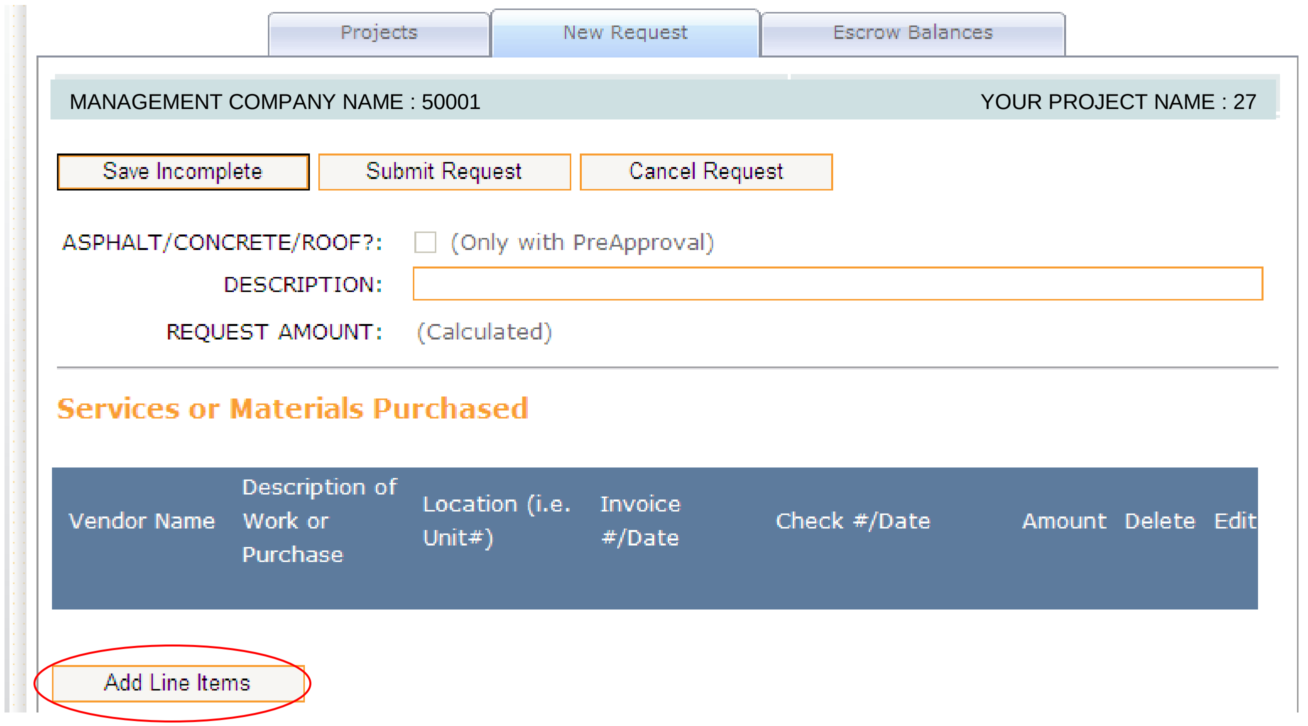
Adding a Request

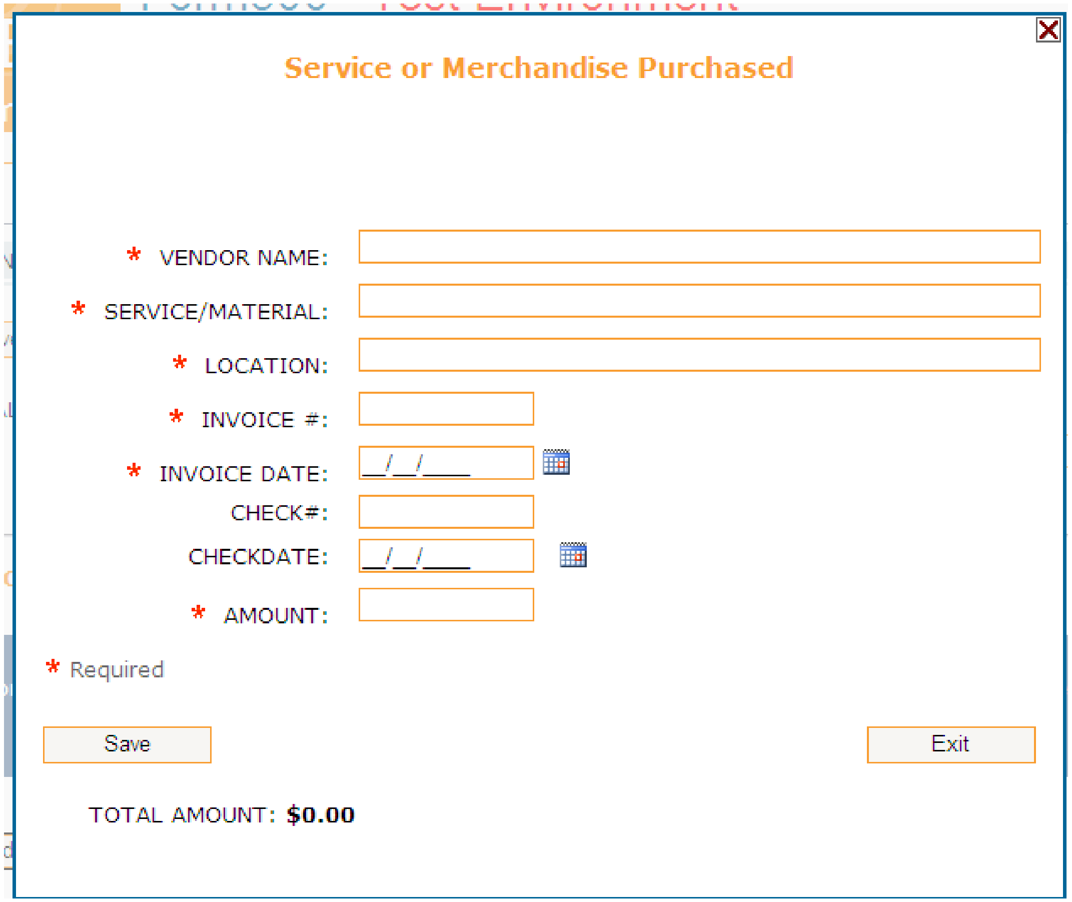
1. Click on the orange hyperlink that says, Add a new request.

⊟ YOUR PROJECT NAME : 4020

Add New Request			
7/6/2010	$7,340.00	Rejected	Various CIs

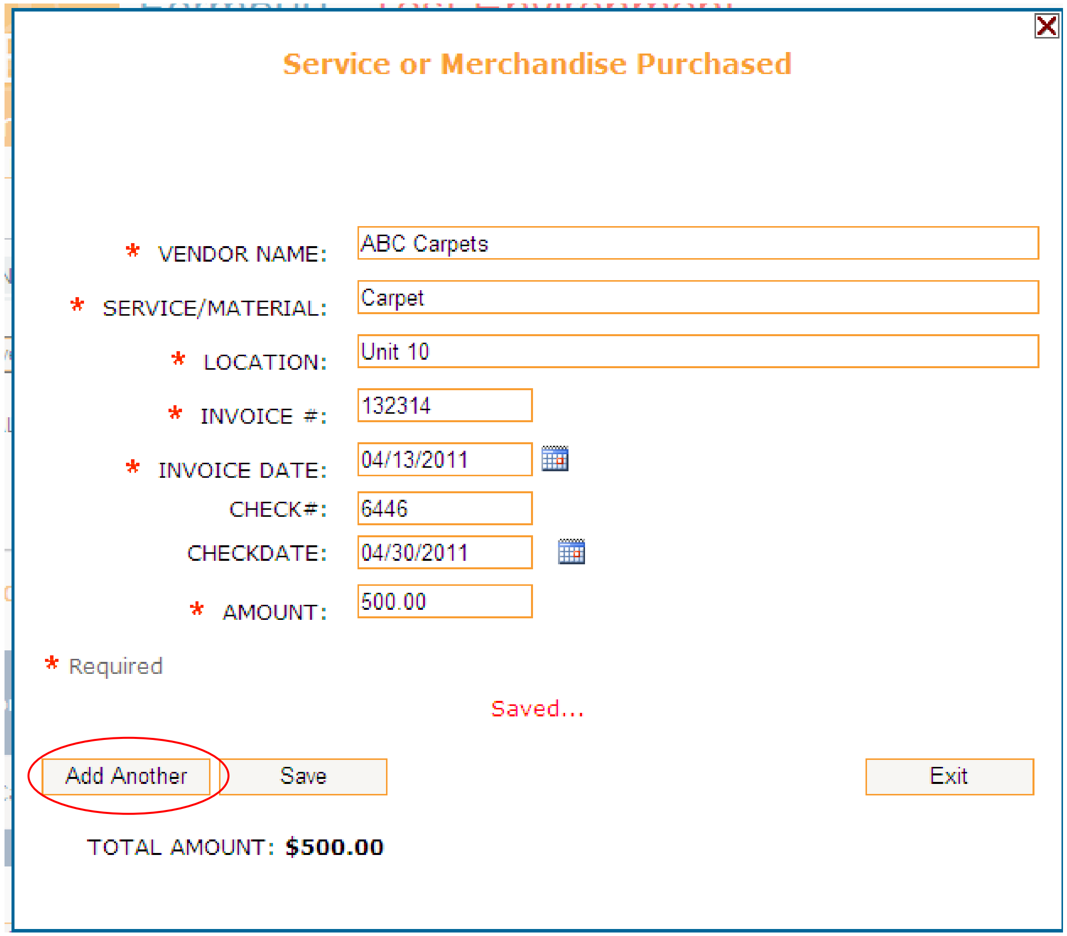
2. **ASPHALT/CONCRETE/ROOF?** Checkbox: If this request is for asphalt, concrete or roofing materials, you must use a preapproval. See the preapproval section of this manual.
3. Enter a **DESCRIPTION**.
4. To add the invoices for this request, click the **Add Line Items** button.

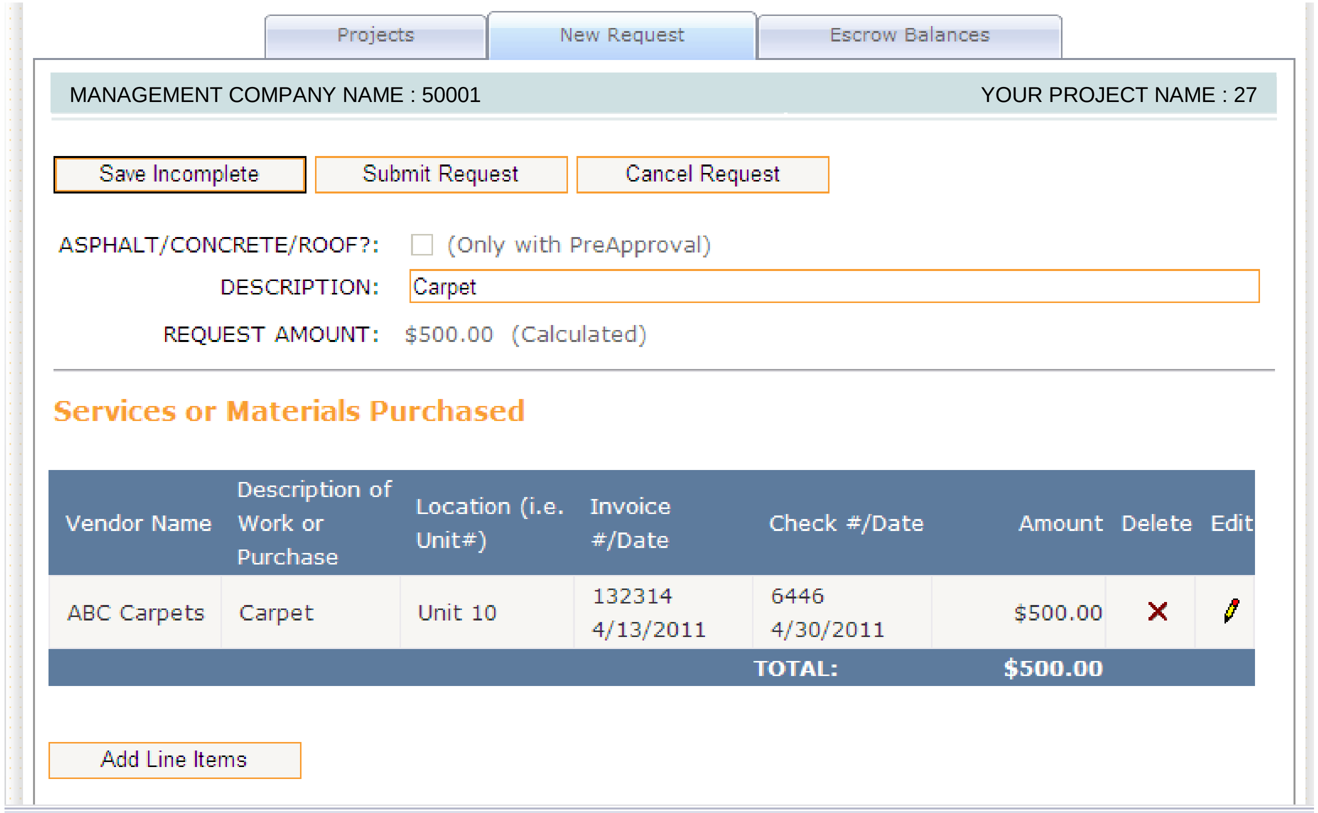




5. Enter **VENDOR NAME** (Required).
6. Enter **SERVICE/MATERIAL** (Required).
7. Enter **LOCATION** (Required). This is the unit # or area of the building.
8. Enter **INVOICE #** (Required).
9. Enter **INVOICE DATE** (Required).
10. Enter **CHECK #** (Not required).
11. Enter **CHECK DATE** (Not required).
12. Enter **AMOUNT** (Required).
13. Click the **Save** button. (If you wish to exit without saving, click the **Exit** button or click the).

14. If you need to add another invoice, click the **Add Another** button. If you are done, click the **Exit** button or click the ❌.





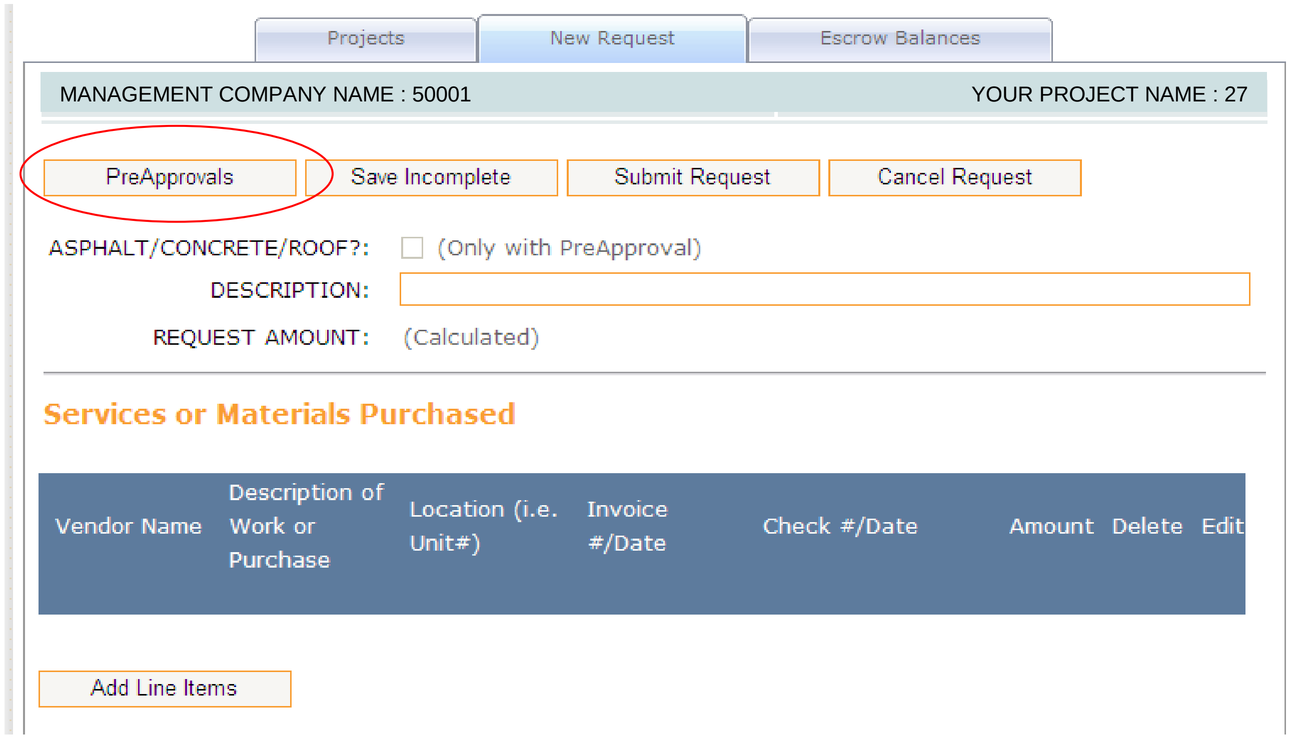
Review Your Request

15. Review your request. You have many options on this page.
    a. You can **Add Line Items.** Click this button if you need to add more invoices to this disbursement request.
    b. You can edit the **DESCRIPTION**.
    c. You can edit the line items by clicking the pencil icon next to the item you wish to edit.
    d. You can **Save Incomplete**. This option will save the disbursement to the project, but it will not submit it to WHEDA. You can save multiple requests as incomplete. You can select the incomplete disbursement by clicking on the orange hyperlink date and submit it to WHEDA. Incomplete disbursements will display in the prior 12 months history of the project.
    e. You can **Cancel Request.** If you have not saved as incomplete or submitted this request, the **Cancel Request** button will delete the request and line items completely. If you have saved, the cancel button will not save any changes since the last save. If you want to delete this request, you will need to **Save Incomplete** and delete the request manually. See the *Deleting an Incomplete Request* section of this manual.

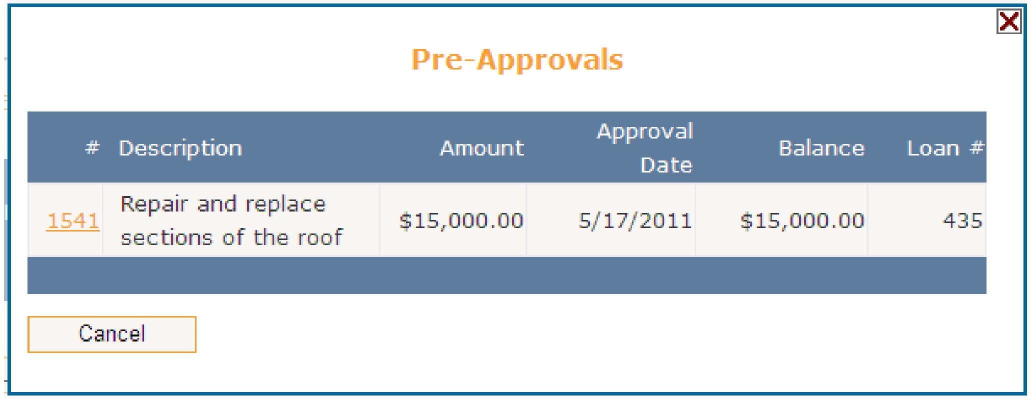
f. You can **Submit Request.** Clicking this button will submit the request to WHEDA. Submitted requests will display in the prior 12 months history of the project. You cannot delete a submitted request. If you have submitted in error, please contact your Asset Manager.

Submitting a Request Using a Preapproval

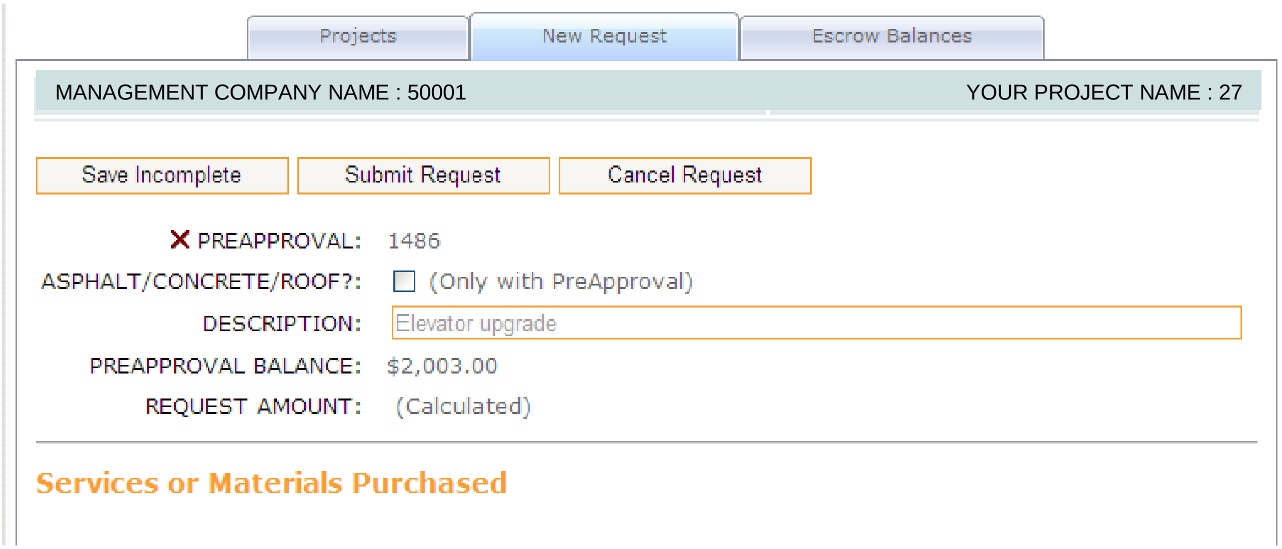
1. From the projects listing, click on the orange hyperlink that says, Add a new request.
2. If you have available preapprovals authorized and entered by your Asset Manager, you will see an additional button labeled **PreApprovals.** Click on this button.



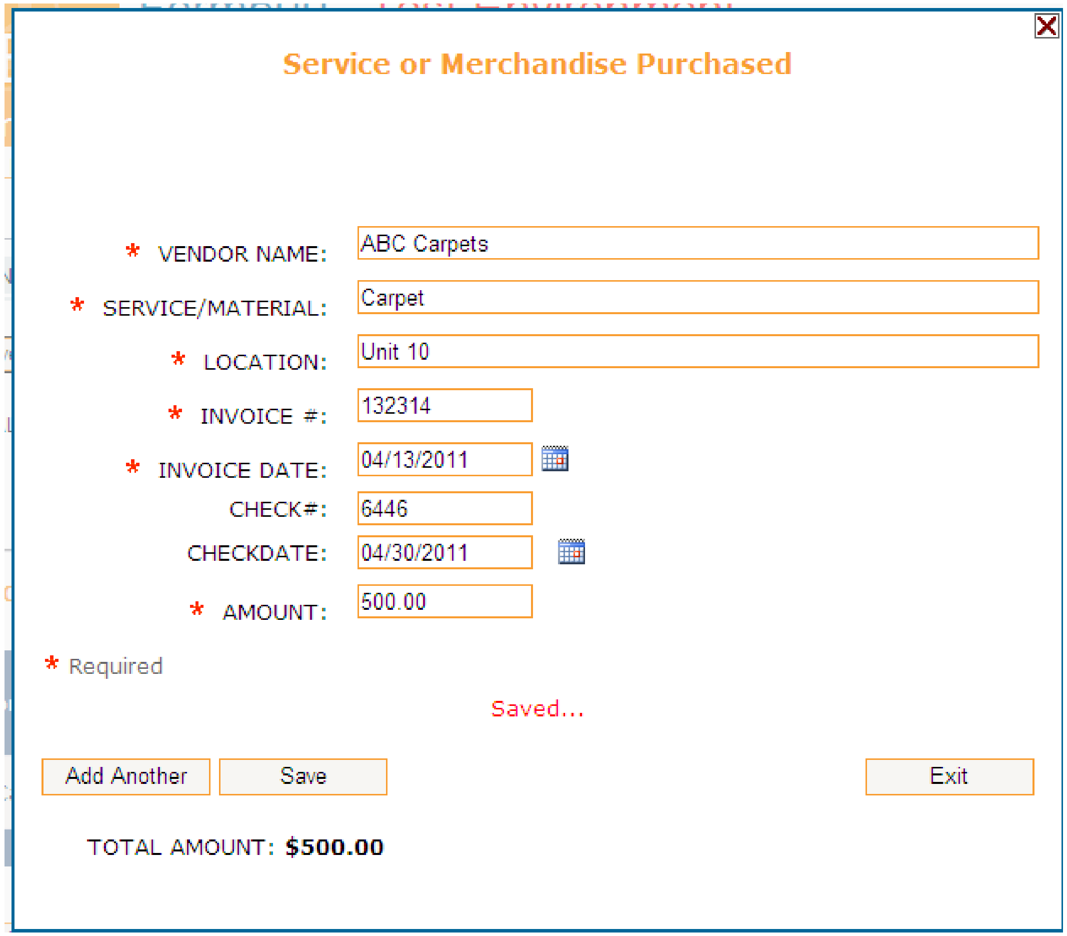
3. A new window will appear listing any preapprovals that have a balance.



4. Click on the orange # hyperlink to select the preapproval. Click **Cancel Request** or to close this window.



5. Check the **ASPHALT/CONCRETE/ROOF?** Box if applicable.
6. The **DESCRIPTION** is filled in based on the description entered by the Asset Manager and cannot be edited.
7. The **PREAPPROVAL BALANCE** will also be displayed.
8. To continue with this preapproval request, click the **Add Line Items** button. To remove the preapproval from this request, click the next to **PREAPPROVAL.**



8. Enter **VENDOR NAME** (Required).
9. Enter **SERVICE/MATERIAL** (Required).
10. Enter **LOCATION** (Required). This is the unit or area of the building.
11. Enter **INVOICE #** (Required).
12. Enter **INVOICE DATE** (Required).
13. Enter **CHECK #** (Not required).
14. Enter **CHECK DATE** (Not required).
15. Enter **AMOUNT** (Required).
16. Click Save.
17. If you need to add another invoice, click the **Add Another** button. If you are done, click the **Exit** button or the .

18. Review your request. You have many options on this page.
    a. You can **Add Line Items.** Click this button if you need to add more invoices to this disbursement request.
    b. You can edit the line items by clicking the pencil icon next to the item you wish to edit.
    c. You can **Save Incomplete**. This option will save the disbursement to the project, but it will not submit it to WHEDA. You can save multiple requests as incomplete. At anytime, you can select the incomplete disbursement and submit it to WHEDA. Incomplete disbursements will display in the prior 12 months history of the project .
    d. You can **Cancel Request.** If you have not saved as incomplete or submitted this request, the **Cancel Request** button will delete the request and line items completely. If you have saved, the cancel button will not save any changes since the last save. If you want to delete this request, you will need to **Save Incomplete** and delete the request manually. See the *Deleting an Incomplete Request* section of this manual.
    e. You can **Submit Request.** Clicking this button will submit the request to WHEDA. Submitted requests will display in the prior 12 months history of the project. You cannot delete a submitted request. If you have submitted in error, please contact your asset manager.
    f. You can remove the preapproval from this request by clicking the next to **PREAPPROVAL.**

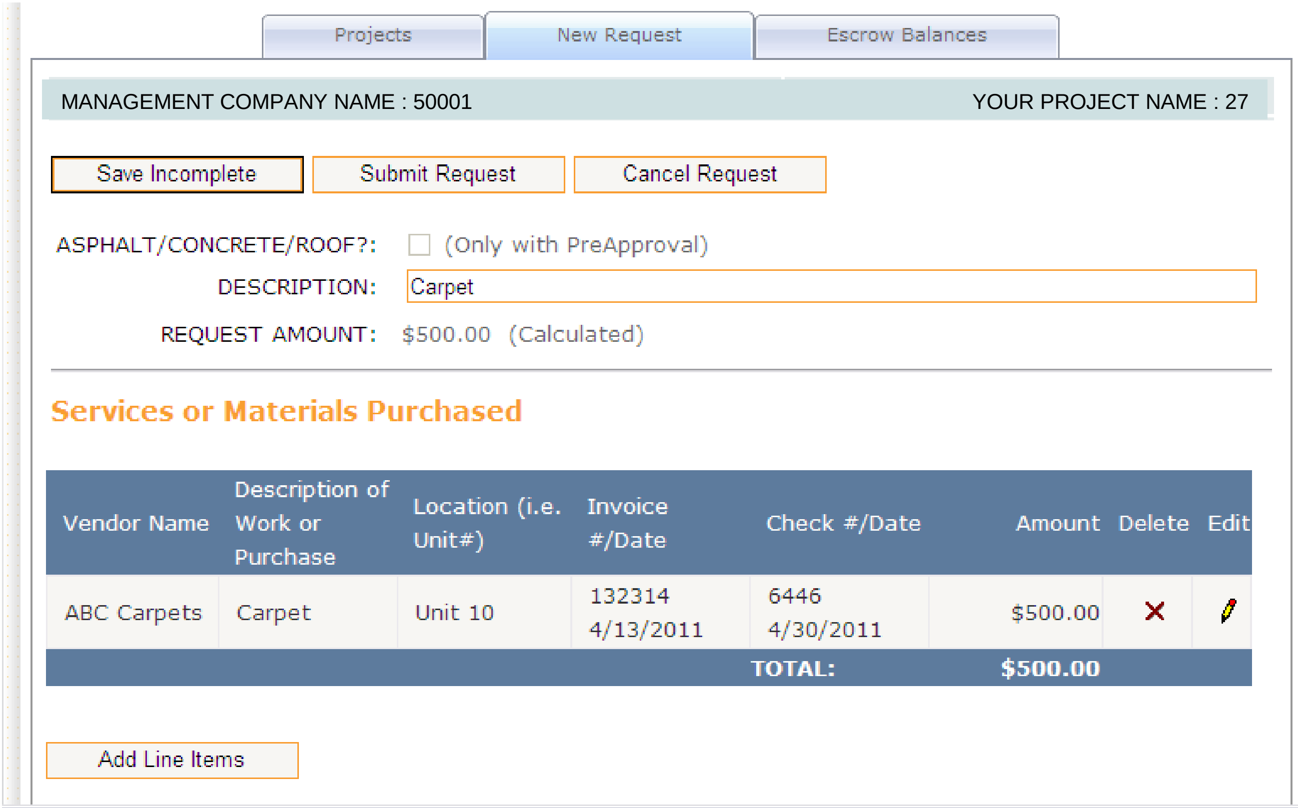
Deleting an Incomplete Request

To delete an incomplete request, click on the to the right of the request.

Add New Request				
5/13/2011	$1,000.00	Incomplete	Replace Carpet	X
12/21/2010	$97,415.70	Disbursed	windows- building permit was not included in the bid.	
11/23/2010	$24,552.15	Disbursed	replace boilers in elderly building	
10/19/2010	$12,092.85	Disbursed	1/3 down payment for boiler work	
10/12/2010	$951.88	Disbursed	Range & Door	
8/3/2010	$4,649.79	Disbursed	new water heater, lock replacement, landscaping,	
7/6/2010	$8,244.86	Disbursed	refrigerator/ range/ hood	
5/18/2010	$5,375.11	Rejected	Various CIs	

Completing and Submitting an Incomplete Request

To edit or submit an incomplete request, click on the orange hyperlink date for the request. The following will display.


Projects | New Request | Escrow Balances

MANAGEMENT COMPANY NAME : 50001   YOUR PROJECT NAME : 27

Save Incomplete | Submit Request | Cancel Request

ASPHALT/CONCRETE/ROOF?: (Only with PreApproval)

DESCRIPTION: Carpet

REQUEST AMOUNT: $500.00 (Calculated)

Services or Materials Purchased

Vendor Name	Description of Work or Purchase	Location (i.e. Unit#)	Invoice #/Date	Check #/Date	Amount	Delete	Edit
ABC Carpets	Carpet	Unit 10	132314 4/13/2011	6446 4/30/2011	$500.00		
				TOTAL:	$500.00		

Add Line Items

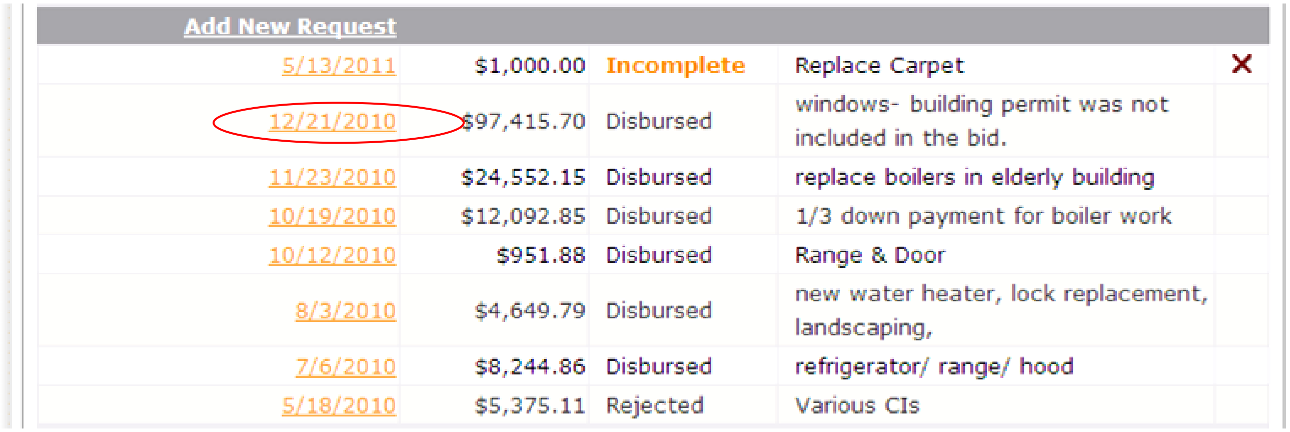
19. Review your request. You have many options on this page.
    a. You can **Add Line Items.** Click this button if you need to add more invoices to this disbursement request.
    b. You can edit the line items by clicking the pencil icon next to the item you wish to edit.
    c. You can **Cancel Request.** If you have not saved as incomplete or submitted this request, the **Cancel Request** button will delete the request and line items completely. If you have saved, the cancel button will not save any changes since the last save. If you want to delete this request, you will need to **Save Incomplete** and delete the request manually. See the *Deleting an Incomplete Request* section of this manual.
    d. You can **Submit Request.** Clicking this button will submit the request to WHEDA. Submitted requests will display in the prior 12 months history of the project. You cannot delete a submitted request. If you have made a submission in error, please contact your asset manager.

e. You can **Save Incomplete** again. This option will save the disbursement to the project, but it will not submit it to WHEDA. You can save multiple requests as incomplete. At anytime, you can select the incomplete disbursement and submit it to WHEDA. Incomplete disbursements will display in the prior 12 months history of the project.

Printing Requests/Disbursements

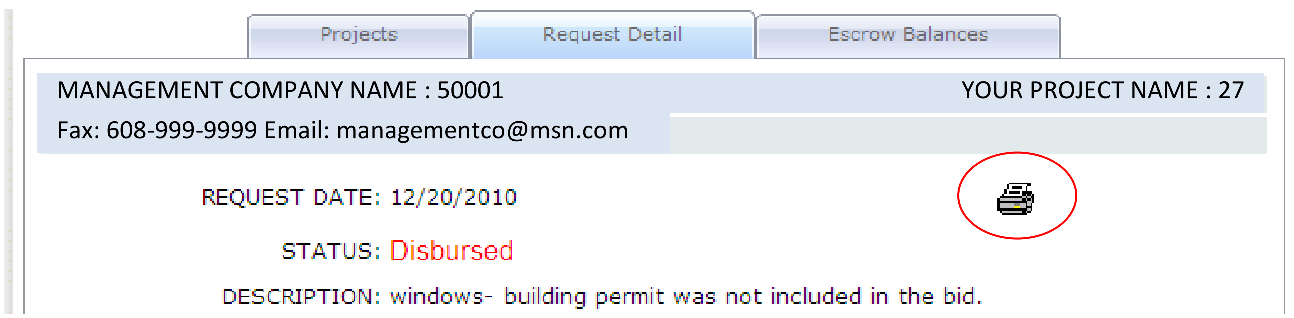
Single Request

To print a single request, click on the orange hyperlink for that request.



Add New Request				
5/13/2011	$1,000.00	Incomplete	Replace Carpet	✕
12/21/2010	$97,415.70	Disbursed	windows- building permit was not included in the bid.	
11/23/2010	$24,552.15	Disbursed	replace boilers in elderly building	
10/19/2010	$12,092.85	Disbursed	1/3 down payment for boiler work	
10/12/2010	$951.88	Disbursed	Range & Door	
8/3/2010	$4,649.79	Disbursed	new water heater, lock replacement, landscaping,	
7/6/2010	$8,244.86	Disbursed	refrigerator/ range/ hood	
5/18/2010	$5,375.11	Rejected	Various CIs	

Click the printer icon from this screen.



The following report will be displayed.

1 / 2 Main Report 100%

WHEDA FORM500

Form 500 Request Report

AGENCY: MANAGEMENT COMPANY

PROJECT: PROJECT NAME: 27

FAX: 608-999-9999

EMAIL: managementco@msn.com

REQUEST DATE: 12/20/2010

STATUS: Disbursed (12/21/2010)

DESCRIPTION: windows- building permit was not included in the bid.

PREAPPROVAL NUMBER: NA

ESCROW ACCT: REPLACEMENT RESERVE

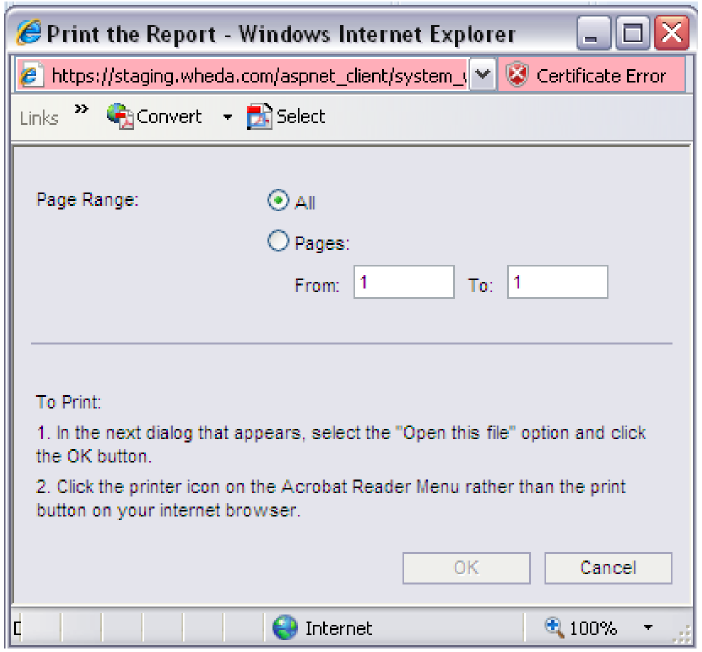
ASPHALT/CONCRETE/ROOF: No

LOAN NUMBER: 435

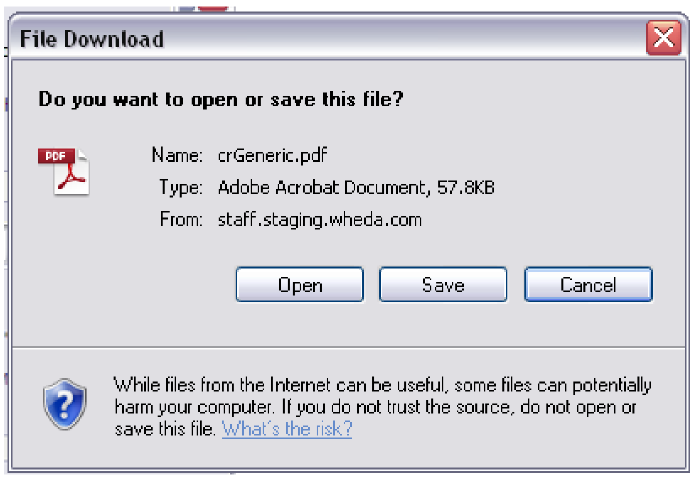
TOTAL AMOUNT OF REQUEST: $ 97,415.70

VENDOR	DESCRIPTION OF WORK OR PURCHASE	LOCATION	INVOICE # / DATE	CHECK # / DATE	AMO
HD Supply Facilities Maintenance	Plumbing Fixtures	592-Homestead	9104286647 8/18/2010		$1
HD Supply Facilities Maintenance	Plumbing Fixtures	591-Homestead	9104259139 8/17/2010		$15
HD Supply Facilities Maintenance	Plumbing Fixtures	591-Homestead	9104580348 9/3/2010		$4
HD Supply Facilities Maintenance	Plumbing Fixtures	591-Homestead	9104822039 9/17/2010		$10

The following window appears with printing instructions listed towards bottom. Make sure ALL is selected to ensure you get all pages. Click OK.

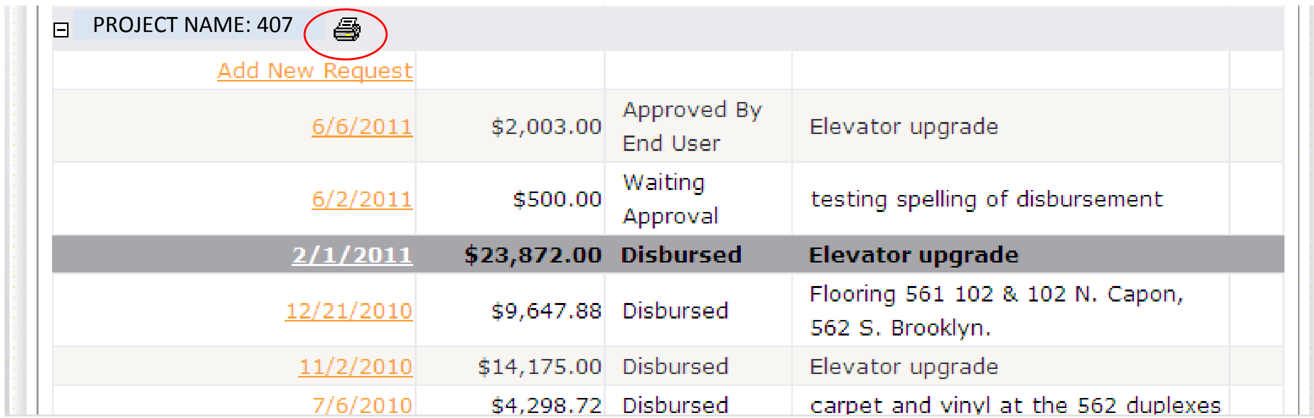


The standard Adobe window then appears. Click the Open button. Adobe will open and you can print as you normally would through Adobe. If you don't have Adobe installed, a free copy of Adobe Reader can be found at: http://get.adobe.com/reader/



Range of Disbursements

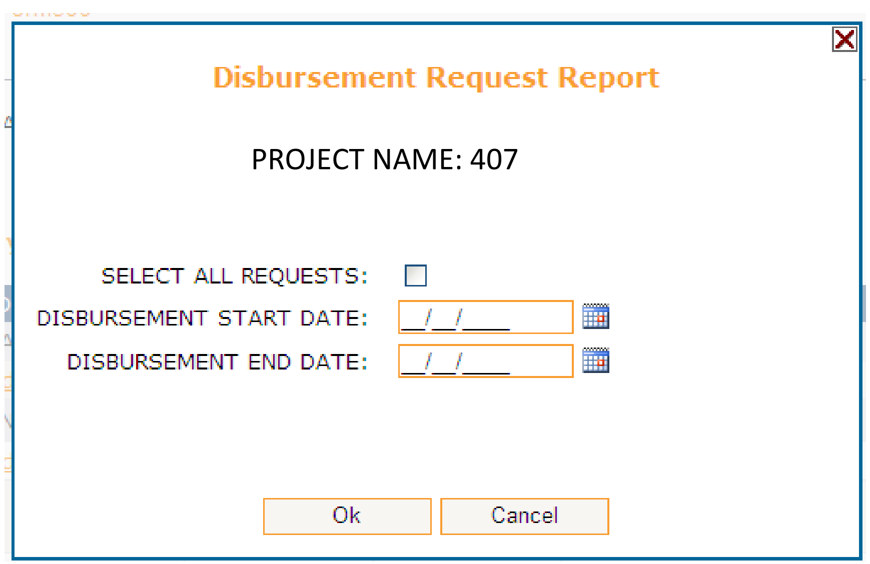
To print all disbursements for a project or to print disbursements for a specific date range, click on the printer icon next to the project name. It is important to note this report only produces requests that have been disbursed by WHEDA. It does not include requests waiting approval, approved by end user or incomplete.



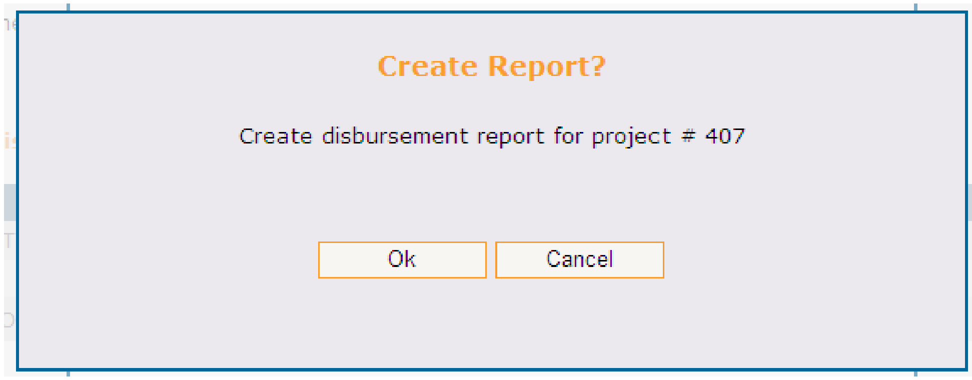
PROJECT NAME: 407

Add New Request			
6/6/2011	$2,003.00	Approved By End User	Elevator upgrade
6/2/2011	$500.00	Waiting Approval	testing spelling of disbursement
2/1/2011	**$23,872.00**	**Disbursed**	**Elevator upgrade**
12/21/2010	$9,647.88	Disbursed	Flooring 561 102 & 102 N. Capon, 562 S. Brooklyn.
11/2/2010	$14,175.00	Disbursed	Elevator upgrade
7/6/2010	$4,298.72	Disbursed	carpet and vinyl at the 562 duplexes

The following window will appear:



If you want every request disbursed for this project, check the 'Select All Requests" box and Click OK.

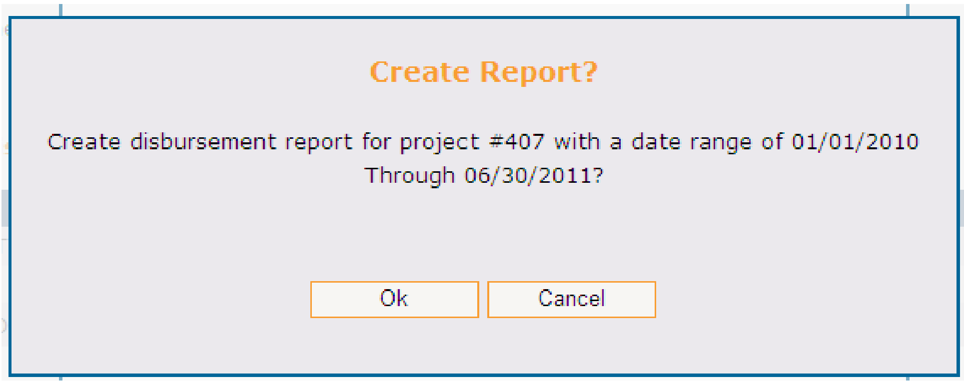


Click OK. The following report will be displayed.

Click on the dates to the left of the report to select each disbursement or scroll through the pages by using the arrows at the top of the window.

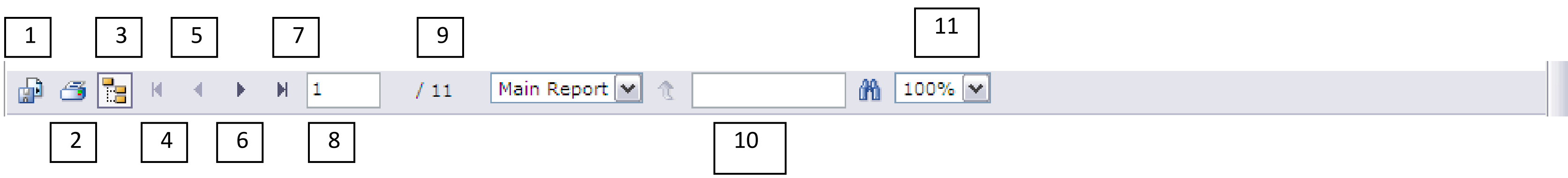
You may print one or more or all pages, by clicking the printer icon at the top of the report.

If you want to enter a specific date range, enter a disbursement start date and a disbursement end date in the applicable fields. Click OK.



The report will look the same as if you clicked the All check box except it will be for those specific dates only.

Using the Navigator Bar at the Top of the Report



1. Export button. Click this button to export the report to another format. PDF, Word, etc.
2. Print button. Click this button to send the report to your printer.
3. This button will show or hide the group tree. The group tree is the list of dates you see on the left hand side of the report.
4. Click this arrow to go to the first page of the report.
5. Click this arrow to go to the previous page of the report.
6. Click this arrow to go to the next page of the report.
7. Click this arrow to go to the last page of the report.
8. This indicates the page number you are currently on. You may also type in a page number to navigate to that page.
9. This indicates how many pages are in the report.
10. This is the search window. Enter what you would like to search for and either hit enter or click the binoculars.
11. Click on the drop down arrow to zoom in or out.