Portland Housing Bureau

Web Compliance Management System

WCMS User Guide | 2026

V1.1

Portland Housing Bureau

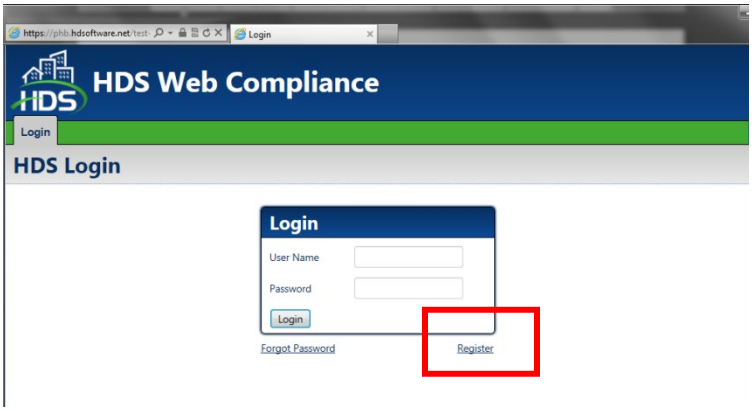
Table of Contents

Getting Started 3
Registering for WCMS 3
Logging into WCMS 4
Change Your Email Address or Password 4
Entering Tenant Compliance Data 7
Navigation 7
Entering Tenant Data: XML Upload 7
Manual Data Entry: Move-In a Tenant 8
Manual Data Entry: Recertify a Tenant 12
Manual Data Entry: Move-Out a Tenant 13
Manual Data Entry: Edit a Certification 14
Reports 16
Occupancy and Demographics Report 16
Tenant Income Certification 16

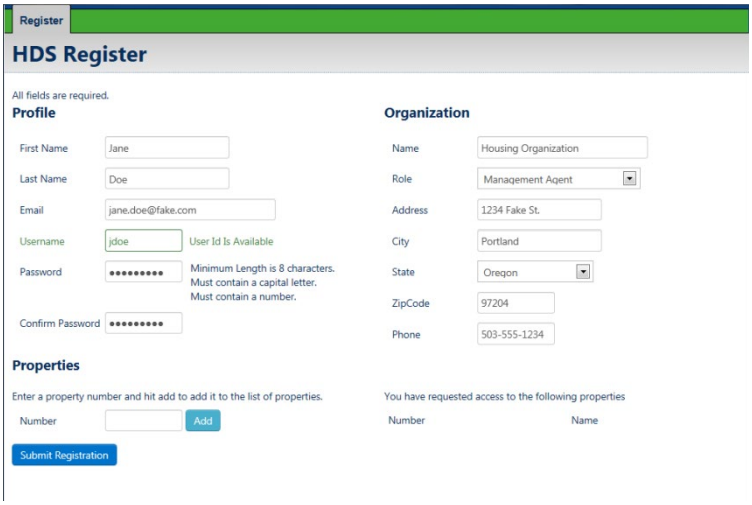
Getting Started

Registering for WCMS

1. In a web browser, navigate to https://phb.hdsoftware.net/WebCompliance/Login/Login.
2. Click **Register**.



3. Fill out the information under **Profile** and **Organization**.
4. As you type a Username, the application will let you know if the User ID is available.
5. The password must adhere to the password standards that are listed next to the Password fields.

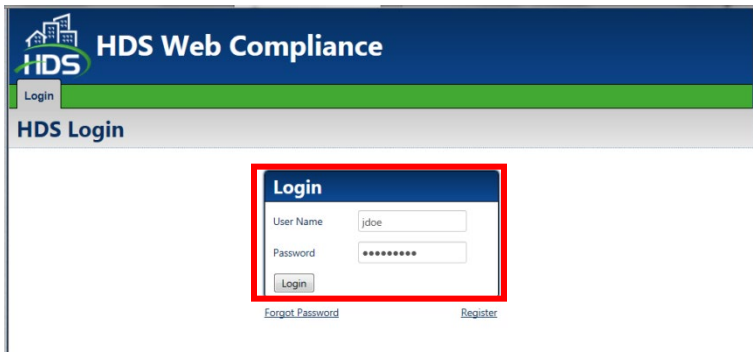


6. Please do not share accounts in an organization or share passwords. You will need to create an account for every person in your organization that will be accessing WCMS.
7. If you know the property number for the properties you manage, next to **Number**, type the property number, and then click **Add**. If you don't know the property numbers, you can leave this blank and PHB will assign the correct properties to your ID when your registration is approved.
8. Click **Submit Registration**.

9. After you have finished registering, please email Marrie at Marrie.Sanders@portlandoregon.gov to let her know that you have registered. Marrie will approve your login and assign your properties and then you can log into the system.

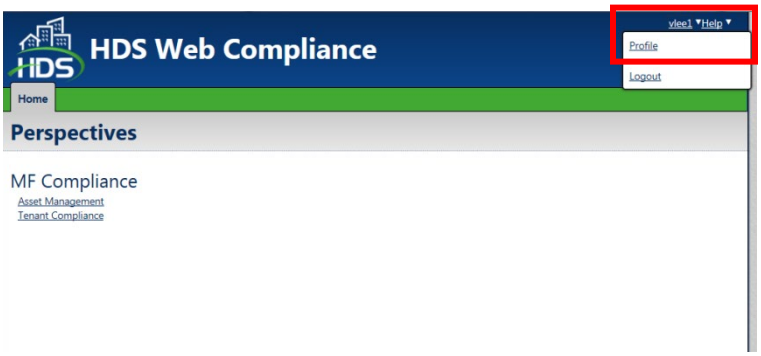
Logging into WCMS

1. In a web browser, navigate to https://phb.hdsoftware.net/WebCompliance/Login/Login.
2. Type your **User Name** and **Password** in the fields, and then click **Login**.

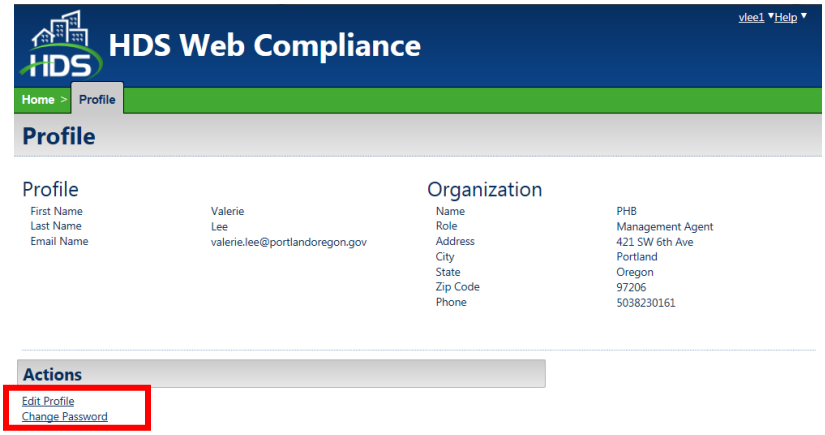


Change Your Email Address or Password

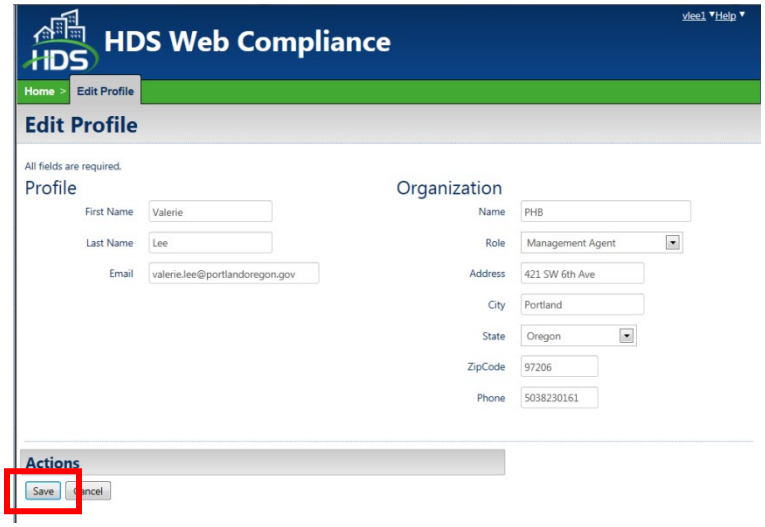
1. In the upper right corner, click on your **User ID**, and then click **Profile**.



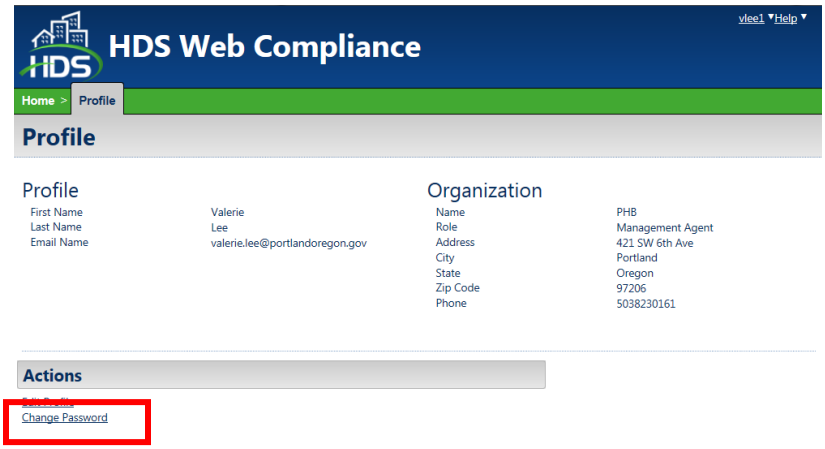
2. To edit information in your profile, click **Edit Profile**.



3. Make changes, and then click **Save**.

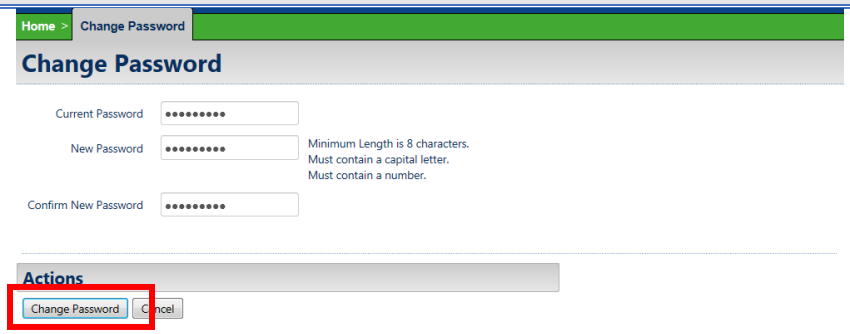


4. To change your password, click **Change Password**.

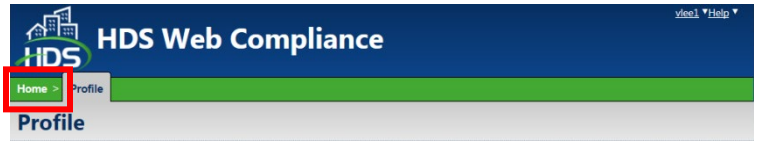


5. Type your current password, and then the new password twice, and then click **Change Password**.

The password must adhere to the password standards that are listed next to the Password fields.



6. To return to the main page, click **Home**.



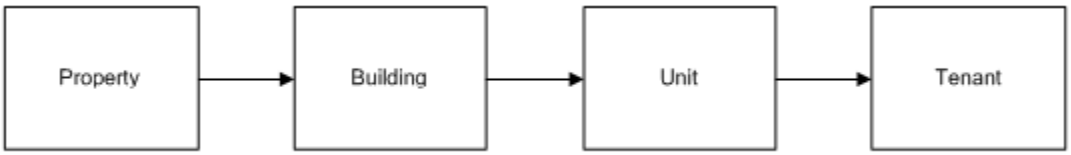
Entering Tenant Compliance Data

There are 2 methods to enter your tenant data into WCMS:

1. **You can enter it manually using the steps to move-in a tenant, recertify a tenant or move-out a tenant.**
2. **Or if you have a property management software that allows you to export into the NAHMA XML format, you can use the steps to upload the data.**

Navigation

1. The WCMS navigation starts with property, then building, unit, and finally tenant.

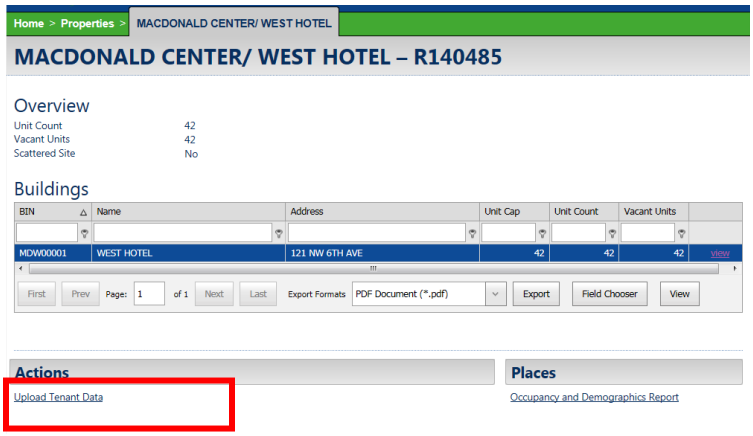


2. To return to a screen in the Tenant Compliance perspective, click on the "breadcrumb" in the navigation bar. For example, if the current screen is displaying tenant information, to return to the unit, click the unit number in the navigation bar.

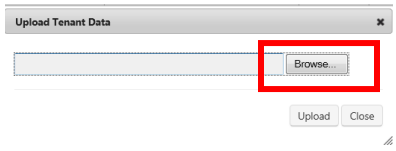
Entering Tenant Data: XML Upload

- XML follows the NAHMA standard and current accepted versions are shown on the XML upload page.
- In most cases for XML upload errors, you will need to work with your software vendor to correct the errors; however, you can contact Marrie.Sanders@portlandoregon.gov to do initial troubleshooting. When emailing include a screenshot of the error from the webpage. **Please DO NOT send a copy of the XML file through email. If the file is needed, it will be requested through a secure file upload.**
- The XML upload through WCMS is provided as a convenience. If you are unable to get the upload to work, you will need to manually enter your certifications.

1. From the property page, under Actions, click **Upload Tenant Data**.



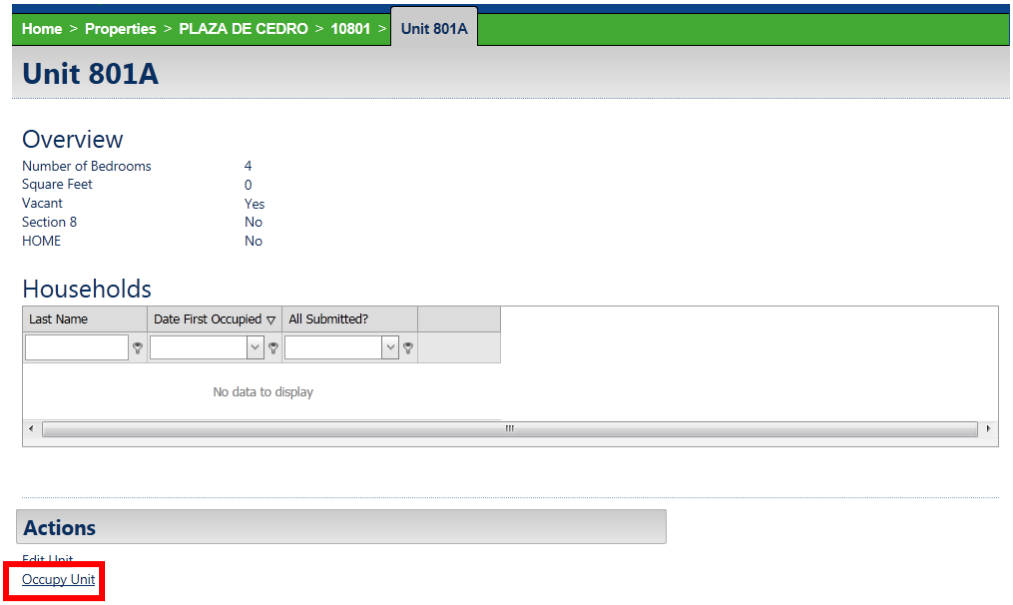
2. On the Upload Tenant Data dialog box, click **Browse**.



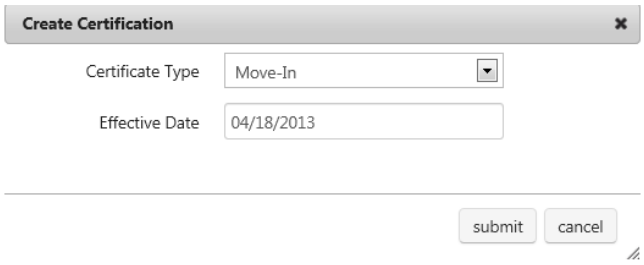
3. Browse to the location of the file, and then click **Open**.
4. On the Upload Tenant Data dialog box, click **Upload**.
5. The Upload Tenant Data Report Result page will appear with details of the upload status.
6. Once you upload has completed, you can use the Occupancy and Demographics report to verify the upload was successful for all units.

Manual Data Entry: Move-In a Tenant

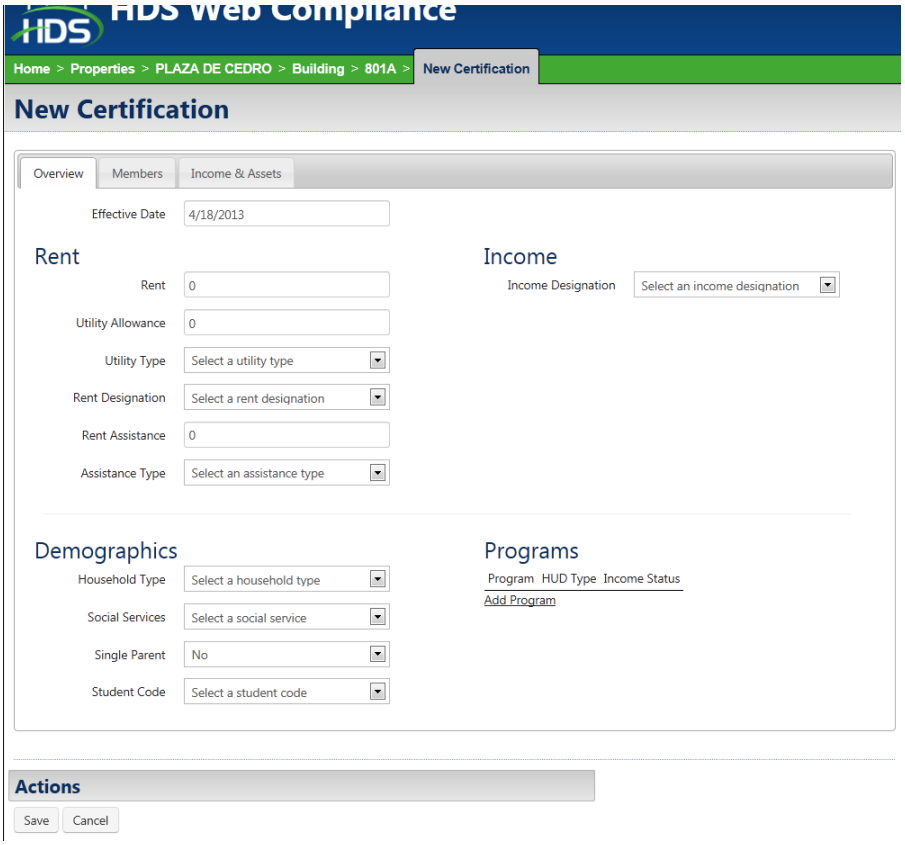
1. To add tenant(s) for a unit, under **Actions** on the unit tab, click **Occupy Unit**.



2. If the unit was vacant, in the Create Certification dialog box, in the **Certificate Type** list, select **Move-In**.
3. Select the date of the move-in, in the **Effective Date** field, and then click **submit**.



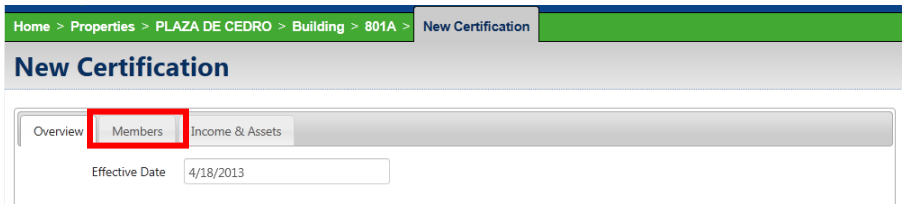
4. On the **Overview** tab, fill out the information using the table below. Anything marked N/A doesn't need to be filled out.



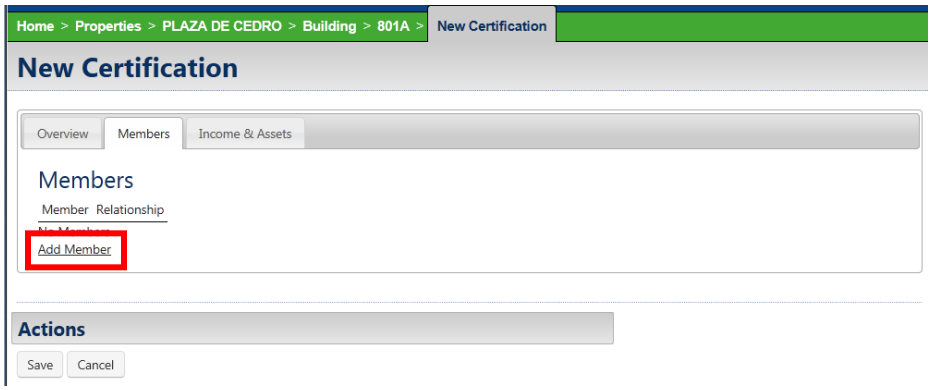
Field	Description
Effective Date	Effective date for the certification.
Rent	The monthly tenant paid rent.
Utility Allowance	The monthly utility allowance.
Utility Type	The type of utility.
Rent Designation	The rent designation amount.
Rent Assistance	The amount of rent assistance.
Assistance Type	Type of assistance provided to the tenant.

Income Designation	The income designation.
Household Type	Type of household.
Social Services	Social services provided to the tenant. Please specify if this is a Preference Policy Unit here.
Single Parent	Indicates whether the tenant is a single parent.
Student Code	N/A
Programs	N/A

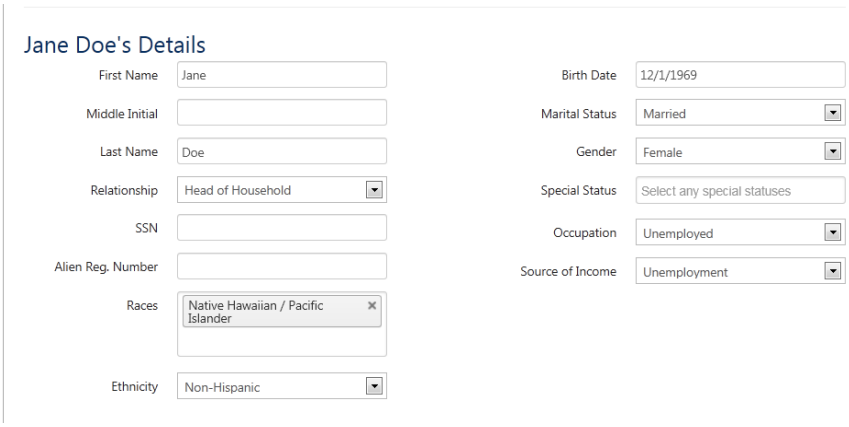
5. Near the bottom of the page, under **Actions**, click **Save**.
6. Click the **Members** tab.



7. To add a family member, click **Add Member**.

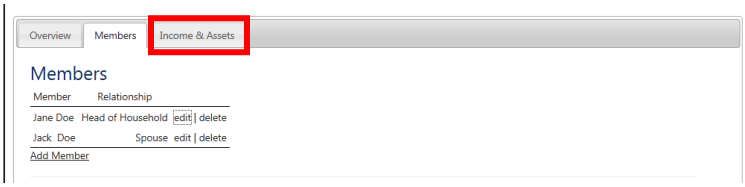


8. Fill out the information on the Members tab for the first family member using the table below as a reference. Anything marked N/A doesn't need to be filled out.

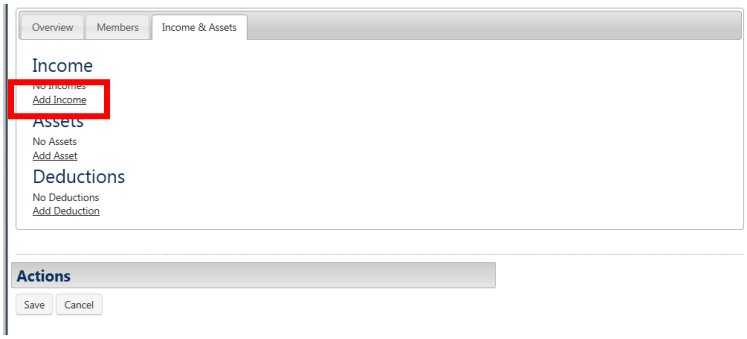


Field	Details
First Name	Tenant's first name.
Middle Initial	Tenant's middle initial.
Last Name	Tenant's last name.
Relationship	Tenant's relationship to the head of household.
SSN	Last four digits of the social security number.
Alien Reg. Number	N/A
Races	Select the race(s) of the tenant.
Ethnicity	Select the tenant's ethnicity.
Birth Date	Tenant's birth date.
Marital Status	Tenant's marital status.
Gender	Tenant's gender.
Special Status	N/A
Occupation	Tenant's occupation.
Source of Income	Tenant's source of income.

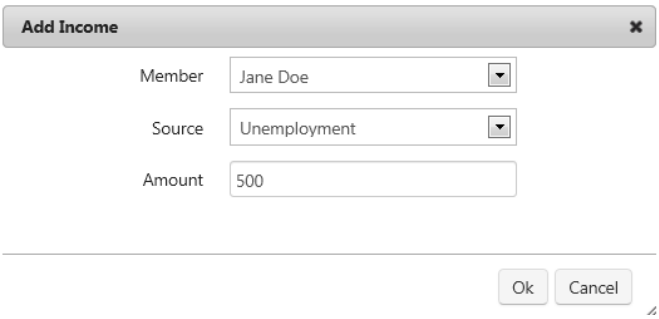
9. Add additional members, and then click the **Income & Assets** tab.



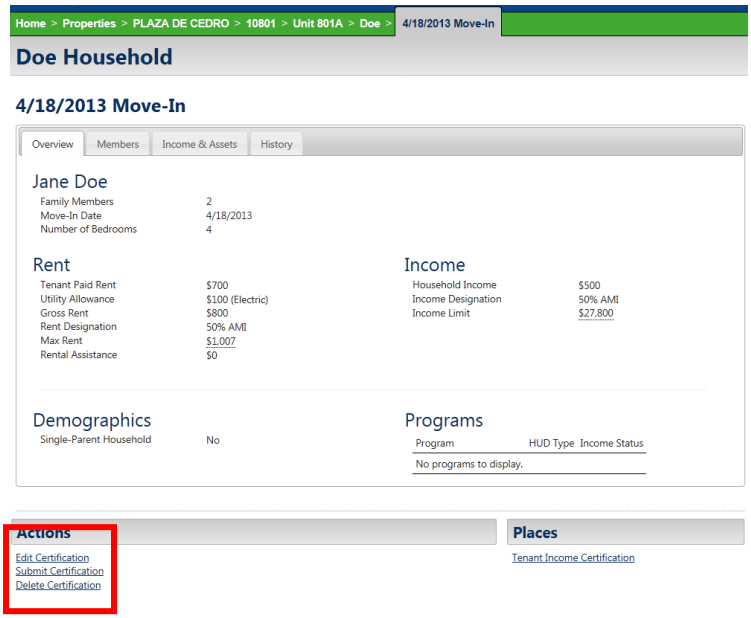
10. To add an income, click **Add Income**.



11. Select the **Member**, **Source** and **Amount**, and then click **OK**. The amount is the annual income for the household member.



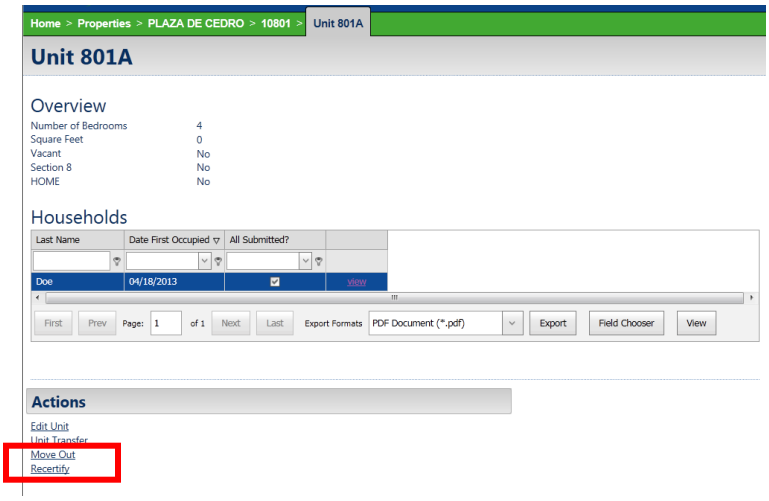
12. Under **Actions**, click **Save**.
13. Once you have verified everything on the certification is correct, you must submit the certification. To submit a certification, click **Submit Certification**.



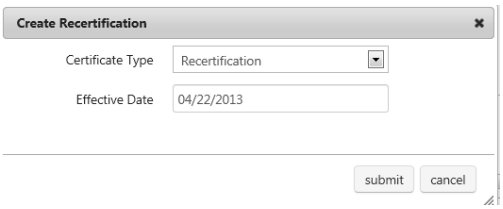
14. On the Submit Certification dialog box, click **yes**.

Manual Data Entry: Recertify a Tenant

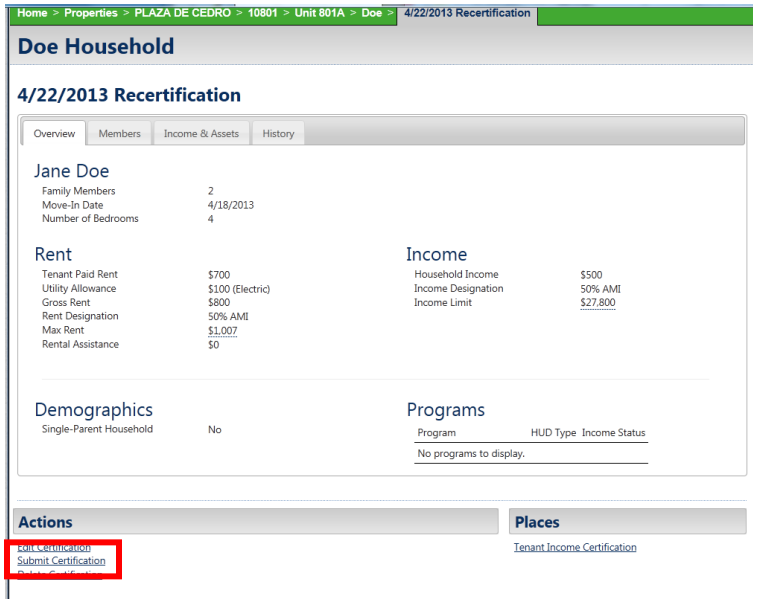
1. On the Unit Overview page, click **Recertify**. *Note: If recertify is not an option, it is likely because the last certification for the unit needs to be submitted. Click **view** next to the last certification for the unit and then click **Submit** under Actions.*



2. Select a **Certification Type** from the drop-down list, and then select an **Effective Date**.

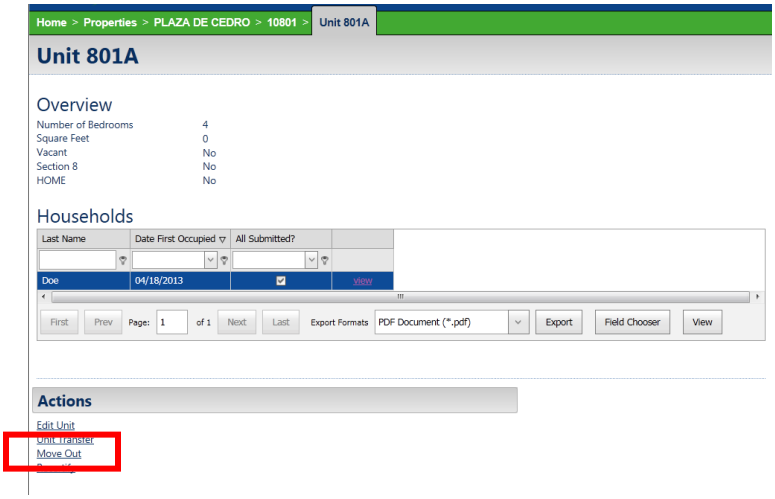


3. Click **submit**.
4. Under **Actions**, click **Edit Certification** to make edits.
5. Once desired edits are complete, under **Actions** click **Submit Certification**.

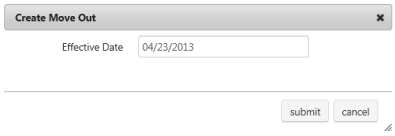


Manual Data Entry: Move-Out a Tenant

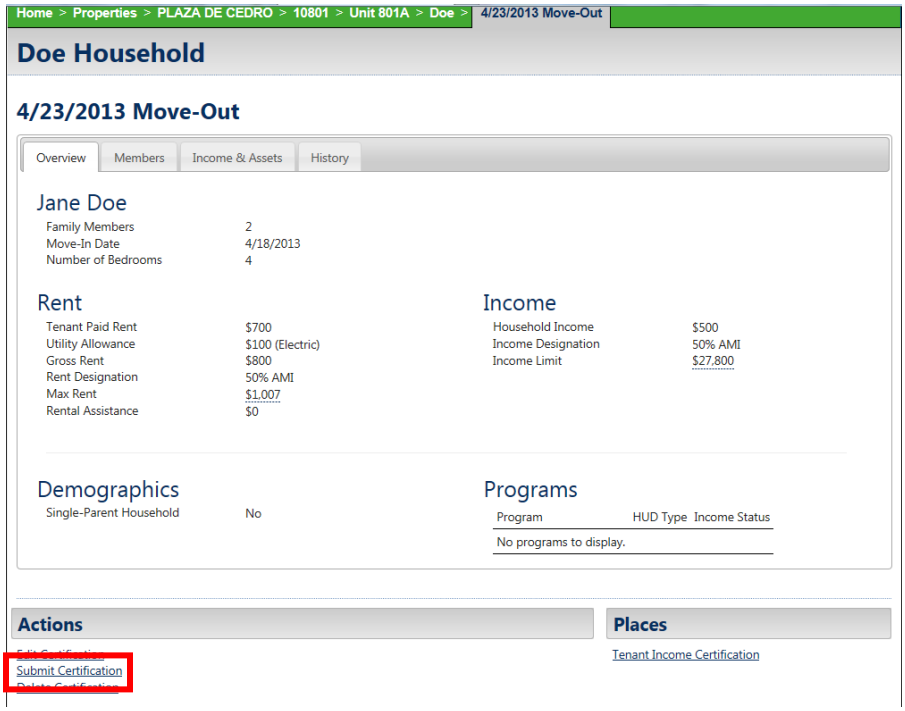
1. On the Unit Overview page, click **Move Out**. *Note: If move-out is not an option, it is likely because the last certification for the unit needs to be submitted. Click **view** next to the last certification for the unit and then click **Submit** under Actions.*



6. On the Create Move Out dialog, select an **Effective Date**, and then click **submit**.



7. Under **Actions**, click **Submit Certification**.

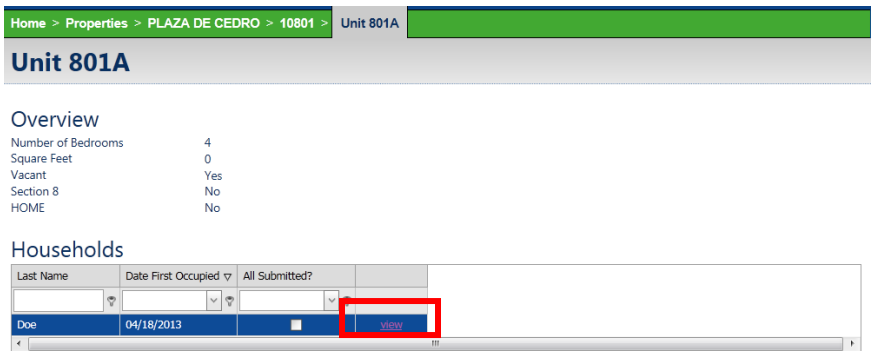


8. On the Submit Certification dialog box, click **yes**.

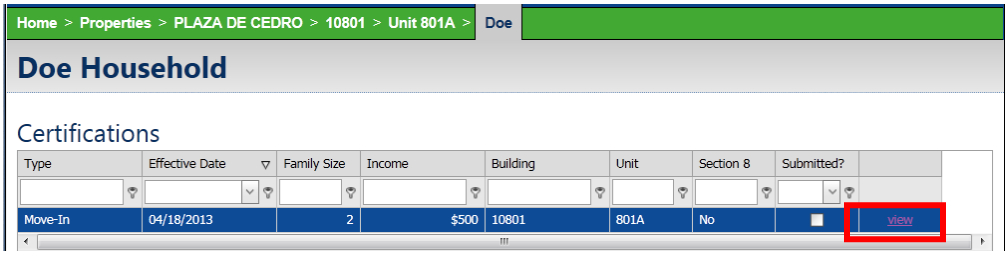
Manual Data Entry: Edit a Certification

- *You can edit tenants before you submit the certification.*
- *Once the certification has been submitted, please email Marrie.Sanders@portlandoregon.gov to unsubmit or delete the certification for you.*

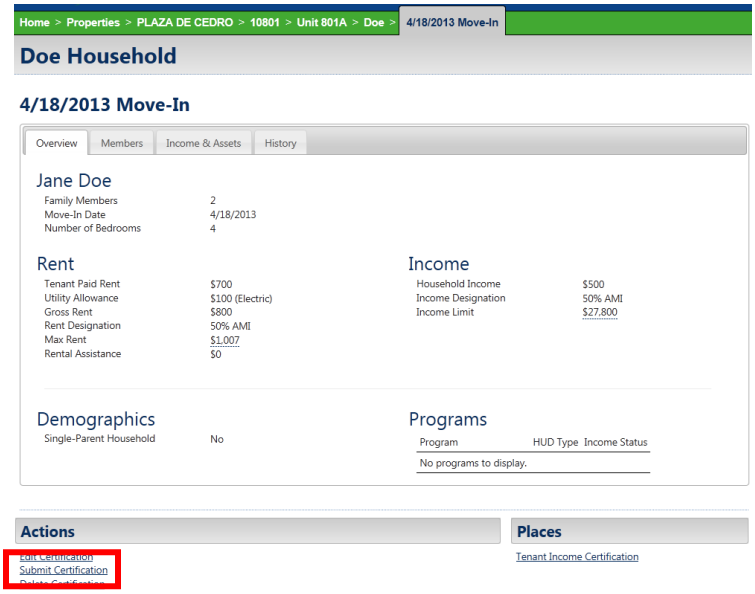
1. On the Unit page, next to the household, click **view**.



2. On the Certifications page, next to the certificate, click **view**.



3. To edit the certification, click **Edit Certification**, make changes, and then click **Save**.
4. To submit the certification, click **Submit Certification**.

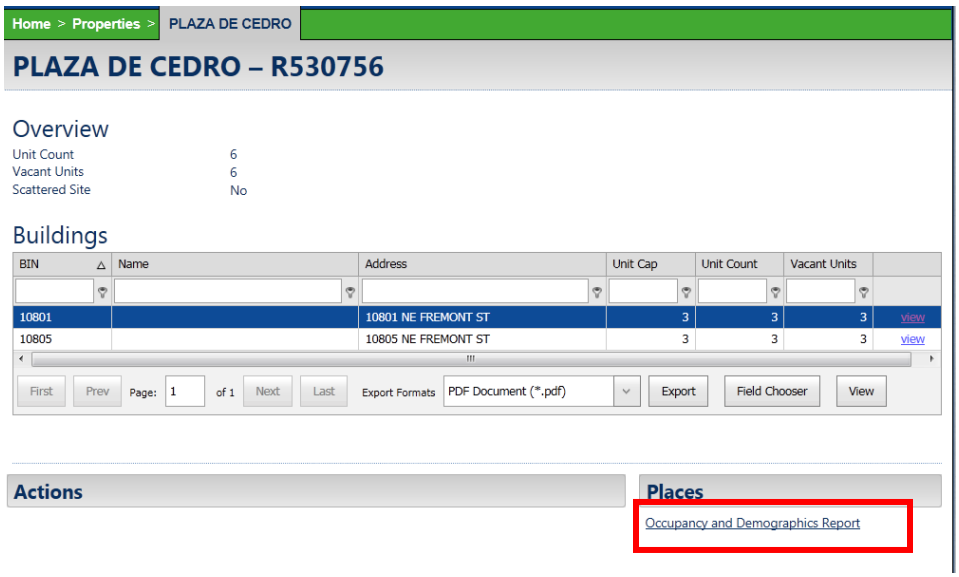


5. On the Submit Certification dialog box, click **yes**.

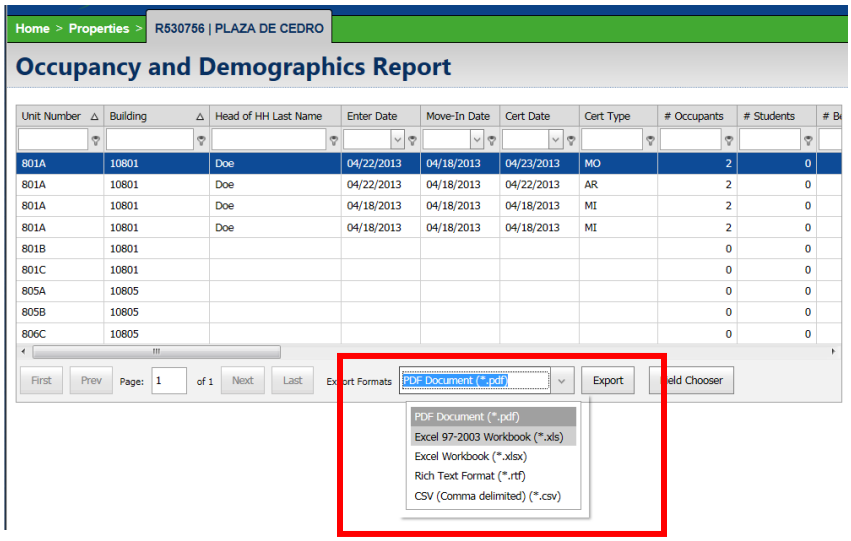
Reports

Occupancy and Demographics Report

1. From the property tab, under **Places** click **Occupancy and Demographics Report**.



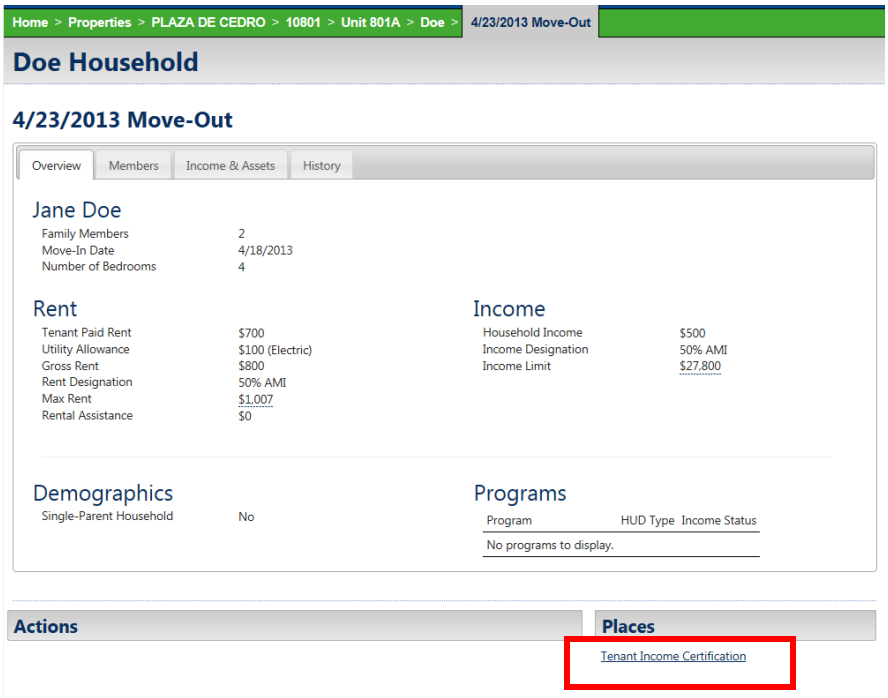
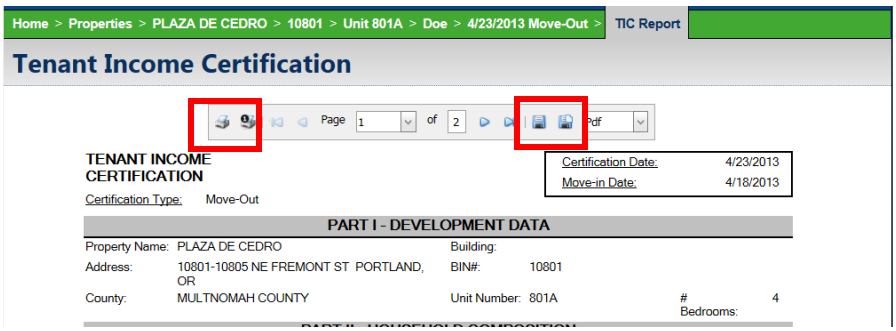
2. Scroll to the right to view the occupancy information. To export the data, choose the export format, and then click **Export**.



Tenant Income Certification

This report is just for your records if you are interested in a copy.

1. From the tenant certification tab, under **Places**, click **Tenant Income Certification**.



2. Click the printer icon to print, or click the save icon to save the certification.