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Portland Housing Bureau

# Web Compliance Management System

*WCMS User Guide*



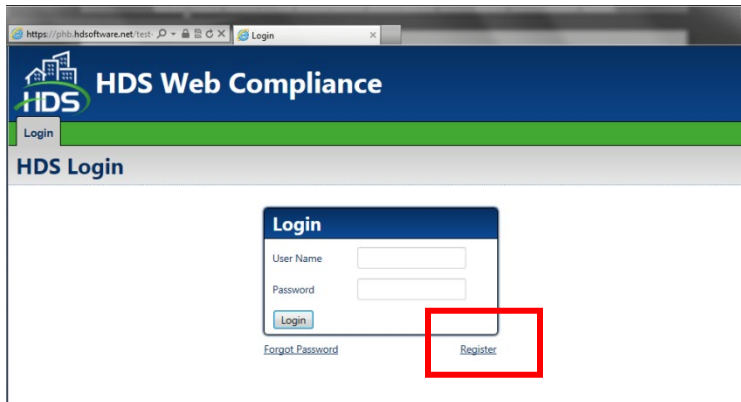
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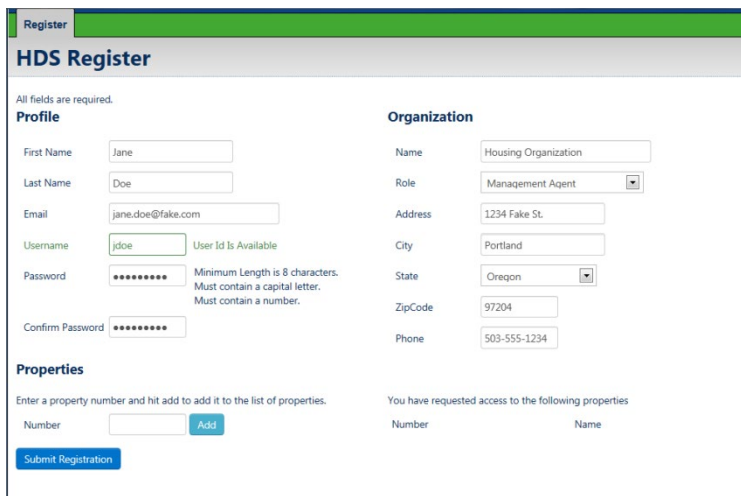
# Getting Started

## 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 Valerie at [Valerie.lee@portlandoregon.gov](mailto:Valerie.lee@portlandoregon.gov) to let her know that you have registered. Valerie 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**.

HDS Web Compliance

HDS Login

**Login**

User Name:

Password:

[Forgot Password](#) [Register](#)

## Change Your Email Address or Password

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

HDS Web Compliance

Home Profile

**Perspectives**

MF Compliance

[Asset Management](#)

[Tenant Compliance](#)

Profile Logout

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

HDS Web Compliance

Home > Profile

**Profile**

<b>Profile</b>		<b>Organization</b>	
First Name	Valerie	Name	PHB
Last Name	Lee	Role	Management Agent
Email Name	valerie.lee@portlandoregon.gov	Address	421 SW 6th Ave
		City	Portland
		State	Oregon
		Zip Code	97206
		Phone	5038230161

**Actions**

[Edit Profile](#)

[Change Password](#)

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

HDS Web Compliance

Home > Edit Profile

### Edit Profile

All fields are required.

**Profile**

First Name: Valerie  
Last Name: Lee  
Email: valerie.lee@portlandoregon.gov

**Organization**

Name: PHB  
Role: Management Agent  
Address: 421 SW 6th Ave  
City: Portland  
State: Oregon  
ZipCode: 97206  
Phone: 5038230161

**Actions**

Save Cancel

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

HDS Web Compliance

Home > Profile

### Profile

**Profile**

First Name: Valerie  
Last Name: Lee  
Email Name: valerie.lee@portlandoregon.gov

**Organization**

Name: PHB  
Role: Management Agent  
Address: 421 SW 6th Ave  
City: Portland  
State: Oregon  
Zip Code: 97206  
Phone: 5038230161

**Actions**

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.*

HDS Web Compliance

Home > Change Password

### Change Password

Current Password: [password field]

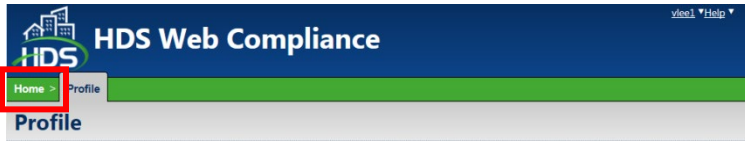
New Password: [password field] Minimum Length is 8 characters. Must contain a capital letter. Must contain a number.

Confirm New Password: [password field]

**Actions**

Change Password Cancel

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



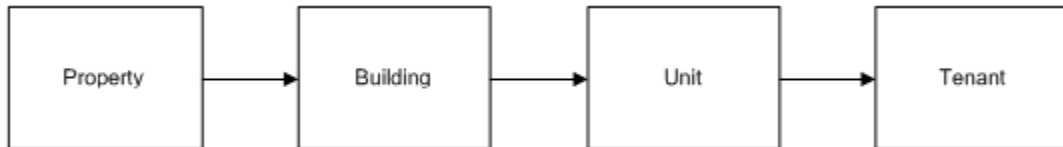
# Entering Tenant Compliance Data

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

- At this time, the accepted versions of XML are NAHMA 3.1 or 4.0.
- In most cases for XML upload errors, you will need to work with your software vendor to correct the errors; however, you can contact Valerie at [Valerie.lee@portlandoregon.gov](mailto:Valerie.lee@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**.

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

**Create Certification** ✕

Certificate Type

Effective Date

- 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
<b>Effective Date</b>	Effective date for the certification.
<b>Rent</b>	The monthly tenant paid rent.
<b>Utility Allowance</b>	The monthly utility allowance.
<b>Utility Type</b>	The type of utility.
<b>Rent Designation</b>	The rent designation amount.
<b>Rent Assistance</b>	The amount of rent assistance.
<b>Assistance Type</b>	Type of assistance provided to the tenant.

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

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

The screenshot shows the 'New Certification' page with a breadcrumb trail: Home > Properties > PLAZA DE CEDRO > Building > 801A > New Certification. Below the title, there are three tabs: Overview, Members (highlighted with a red box), and Income & Assets. Under the Members tab, there is an 'Effective Date' field with the value 4/18/2013.

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

This screenshot shows the 'New Certification' page with the 'Members' tab selected. Below the tab bar, there is a section titled 'Members' with a table header 'Member Relationship'. Below the header, there is a red box around the 'Add Member' button. At the bottom of the page, there is an 'Actions' bar with 'Save' and 'Cancel' buttons.

- 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.

The screenshot shows a form titled 'Jane Doe's Details' with the following fields and values:

First Name	Jane	Birth Date	12/1/1969
Middle Initial		Marital Status	Married
Last Name	Doe	Gender	Female
Relationship	Head of Household	Special Status	Select any special statuses
SSN		Occupation	Unemployed
Alien Reg. Number		Source of Income	Unemployment
Races	Native Hawaiian / Pacific Islander		
Ethnicity	Non-Hispanic		

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

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

Overview Members **Income & Assets**

Members

Member	Relationship	
Jane Doe	Head of Household	<a href="#">edit</a>   <a href="#">delete</a>
Jack Doe	Spouse	<a href="#">edit</a>   <a href="#">delete</a>

[Add Member](#)

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

Overview Members **Income & Assets**

Income

**Add Income**

ASSETS

No Assets  
[Add Asset](#)

Deductions

No Deductions  
[Add Deduction](#)

**Actions**

[Save](#) [Cancel](#)

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

**Add Income** ✕

Member

Source

Amount

[Ok](#) [Cancel](#)

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**.

The screenshot shows the 'Doe Household' page for a '4/18/2013 Move-In'. It includes sections for 'Jane Doe' (Family Members: 2, Move-In Date: 4/18/2013, Number of Bedrooms: 4), 'Rent' (Tenant Paid Rent: \$700, Utility Allowance: \$100 (Electric), Gross Rent: \$800, Rent Designation: 50% AMI, Max Rent: \$1,007, Rental Assistance: \$0), 'Income' (Household Income: \$500, Income Designation: 50% AMI, Income Limit: \$27,800), 'Demographics' (Single-Parent Household: No), and 'Programs' (No programs to display). At the bottom, the 'Actions' menu is highlighted with a red box, containing 'Edit Certification', 'Submit Certification', and 'Delete Certification'. The 'Places' section shows 'Tenant Income 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.*

The screenshot shows the 'Unit 801A' page. It includes an 'Overview' section (Number of Bedrooms: 4, Square Feet: 0, Vacant: No, Section 8: No, HOME: No) and a 'Households' table. The table has columns for 'Last Name', 'Date First Occupied', and 'All Submitted?'. A row for 'Doe' is highlighted with a blue background, showing '04/18/2013' and a 'View' link. Below the table are navigation buttons: 'First', 'Prev', 'Page: 1 of 1', 'Next', 'Last', 'Export Formats', 'PDF Document (\*.pdf)', 'Export', 'Field Chooser', and 'View'. At the bottom, the 'Actions' menu is highlighted with a red box, containing 'Edit Unit', 'Unit Transfer', 'Move Out', and 'Recertify'.

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

**Create Recertification** ✕

Certificate Type: Recertification

Effective Date: 04/22/2013

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

Home > Properties > PLAZA DE CEDRO > 10801 > Unit 801A > Doe > 4/22/2013 Recertification

**Doe Household**

**4/22/2013 Recertification**

Overview | Members | Income & Assets | History

**Jane Doe**

Family Members	2
Move-In Date	4/18/2013
Number of Bedrooms	4

<b>Rent</b>		<b>Income</b>	
Tenant Paid Rent	\$700	Household Income	\$500
Utility Allowance	\$100 (Electric)	Income Designation	50% AMI
Gross Rent	\$800	Income Limit	\$27,800
Rent Designation	50% AMI		
Max Rent	\$1,007		
Rental Assistance	\$0		

<b>Demographics</b>		<b>Programs</b>	
Single-Parent Household	No	Program	HUD Type Income Status
		No programs to display.	

**Actions** **Places**

[Edit Certification](#)  
[Submit Certification](#)  
[Delete Certification](#)

[Tenant Income 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.*

Home > Properties > PLAZA DE CEDRO > 10801 > Unit 801A

**Unit 801A**

**Overview**

Number of Bedrooms	4
Square Feet	0
Vacant	No
Section 8	No
HOME	No

**Households**

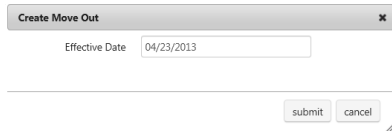
Last Name	Date First Occupied	All Submitted?	
Doe	04/18/2013	☑	<a href="#">View</a>

First Prev Page: 1 of 1 Next Last Export Formats PDF Document (\*.pdf) Export Field Chooser View

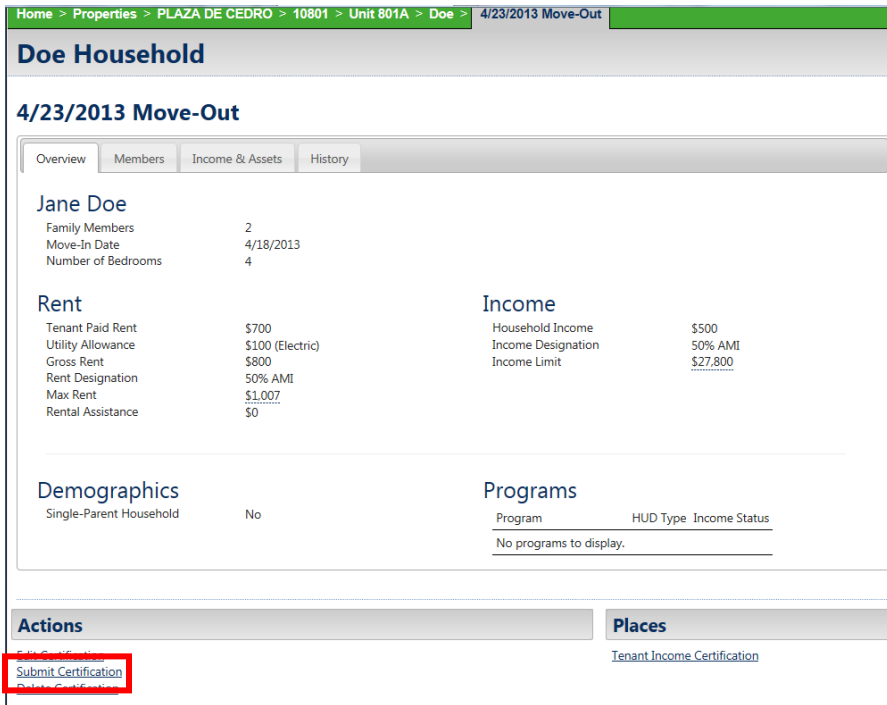
**Actions**

[Edit Unit](#)  
[Unit Transfer](#)  
[Move Out](#)  
[View](#)

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



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



Rent		Income	
Tenant Paid Rent	\$700	Household Income	\$500
Utility Allowance	\$100 (Electric)	Income Designation	50% AMI
Gross Rent	\$800	Income Limit	\$27,800
Rent Designation	50% AMI		
Max Rent	\$1,007		
Rental Assistance	\$0		

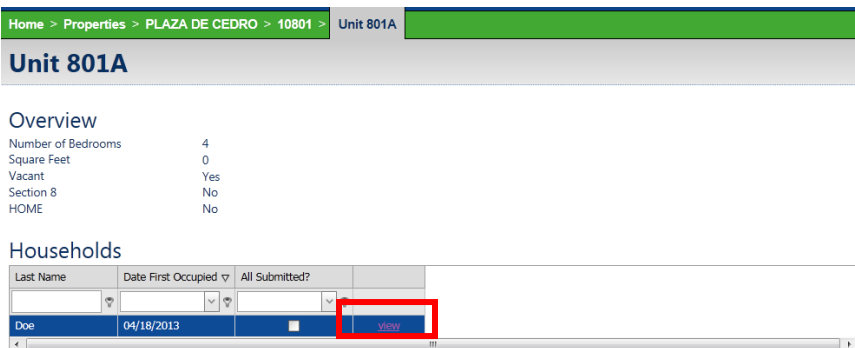
Demographics		Programs	
Single-Parent Household	No	Program	HUD Type Income Status
		No programs to display.	

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 [Valerie.lee@Portlandoregon.gov](mailto:Valerie.lee@Portlandoregon.gov) to unsubmit or delete the certification for you.

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



Last Name	Date First Occupied	All Submitted?
Doe	04/18/2013	<input type="checkbox"/>

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

Type	Effective Date	Family Size	Income	Building	Unit	Section 8	Submitted?	
Move-In	04/18/2013	2	\$500	10801	801A	No	<input type="checkbox"/>	<a href="#">view</a>

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

**4/18/2013 Move-In**

Overview Members Income & Assets History

**Jane Doe**

Family Members: 2  
Move-In Date: 4/18/2013  
Number of Bedrooms: 4

<b>Rent</b>		<b>Income</b>	
Tenant Paid Rent	\$700	Household Income	\$500
Utility Allowance	\$100 (Electric)	Income Designation	50% AMI
Gross Rent	\$800	Income Limit	\$27,600
Rent Designation	50% AMI		
Max Rent	\$1,007		
Rental Assistance	\$0		

**Demographics**

Single-Parent Household: No

**Programs**

Program: HUD Type: Income Status: No programs to display.

**Actions**

[Edit Certification](#)  
[Submit Certification](#)

**Places**

[Tenant Income Certification](#)

- 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**.

Home > Properties > PLAZA DE CEDRO

### PLAZA DE CEDRO – R530756

Overview

Unit Count: 6  
Vacant Units: 6  
Scattered Site: No

Buildings

BIN	Name	Address	Unit Cap	Unit Count	Vacant Units	
10801		10801 NE FREMONT ST	3	3	3	<a href="#">view</a>
10805		10805 NE FREMONT ST	3	3	3	<a href="#">view</a>

First Prev Page: 1 of 1 Next Last Export Formats PDF Document (\*.pdf) Export Field Chooser View

Actions **Places**

[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**.

Home > Properties > R530756 | PLAZA DE CEDRO

### Occupancy and Demographics Report

Unit Number	Building	Head of HH Last Name	Enter Date	Move-In Date	Cert Date	Cert Type	# Occupants	# Students	# B
801A	10801	Doe	04/22/2013	04/18/2013	04/23/2013	MO	2	0	
801A	10801	Doe	04/22/2013	04/18/2013	04/22/2013	AR	2	0	
801A	10801	Doe	04/18/2013	04/18/2013	04/18/2013	MI	2	0	
801A	10801	Doe	04/18/2013	04/18/2013	04/18/2013	MI	2	0	
801B	10801						0	0	
801C	10801						0	0	
805A	10805						0	0	
805B	10805						0	0	
806C	10805						0	0	

First Prev Page: 1 of 1 Next Last Export Formats PDF Document (\*.pdf) Export Field Chooser

PDF Document (\*.pdf)  
Excel 97-2003 Workbook (\*.xls)  
Excel Workbook (\*.xlsx)  
Rich Text Format (\*.rtf)  
CSV (Comma delimited) (\*.csv)

## 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**.

Home > Properties > PLAZA DE CEDRO > 10801 > Unit 801A > Doe > 4/23/2013 Move-Out

## Doe Household

### 4/23/2013 Move-Out

Overview Members Income & Assets History

**Jane Doe**  
 Family Members: 2  
 Move-In Date: 4/18/2013  
 Number of Bedrooms: 4

<b>Rent</b>		<b>Income</b>	
Tenant Paid Rent	\$700	Household Income	\$500
Utility Allowance	\$100 (Electric)	Income Designation	50% AMI
Gross Rent	\$800	Income Limit	\$27,800
Rent Designation	50% AMI		
Max Rent	\$1,007		
Rental Assistance	\$0		

**Demographics**  
 Single-Parent Household: No

**Programs**  
 Program: HUD Type: Income Status:  
 No programs to display.

**Actions** **Places**

Tenant Income Certification

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

Home > Properties > PLAZA DE CEDRO > 10801 > Unit 801A > Doe > 4/23/2013 Move-Out > TIC Report

## Tenant Income Certification

Page 1 of 2 Pdf

**TENANT INCOME CERTIFICATION**  
 Certification Type: Move-Out  
 Certification Date: 4/23/2013  
 Move-in Date: 4/18/2013

**PART I - DEVELOPMENT DATA**

Property Name: PLAZA DE CEDRO	Building:
Address: 10801-10805 NE FREMONT ST PORTLAND, OR	BIN#: 10801
County: MULTNOMAH COUNTY	Unit Number: 801A # Bedrooms: 4